



# 2023-2024

## ADOPTED BUDGET

OFFICE OF THE COUNTY ADMINISTRATOR / JUNE 20, 2023

SAN JOAQUIN COUNTY

# BOARD OF SUPERVISORS

2023-2024



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ADOPTED BUDGET

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*County Administrator*





June 20, 2023

Board of Supervisors  
County Administration Building  
Stockton, CA 95202

## **Fiscal Year 2023-2024 Adopted Budget**

Dear Board Members:

### **Introduction**

*“The greatest glory in living lies not in never falling, but in rising every time we fall.”*

*— Nelson Mandela*

### **COVID-19**

“COVID-19 is over...” Well, the emergency declarations have recently ended and things are quickly getting back to normal. The loss of lives and economic damage in our County have been catastrophic, and scars will certainly be evident as we move forward. Yet, we have moved forward. Businesses are open. Schools and churches are open. People are travelling. Masks are largely gone.

My past two budget messages have centered around the COVID-19 pandemic, and I am grateful to be able to focus on goals and achievements beyond those directed at the pandemic. While we continue to handle the residual effects of COVID-19, it is refreshing to not have our activities orbiting around it.

Therefore, I am pleased to report on a number of important topics which our County is currently focused upon. These are functions and issues which touch our organization and community in a variety of ways:

- Registrar of Voters and Elections
- San Joaquin General Hospital
- American Rescue Plan Act Funds
- Property Tax Sharing
- Floods
- SMART Goals

*“A successful man is one who can lay a firm foundation with the bricks others have thrown at him.”*

*— David Brinkley*

### **Registrar of Voters (ROV) and Elections**

During this past year, our County conducted mid-term Primary and General Elections. The Primary was challenged by the untimely passing of our new ROV, Heather Ditty, and was impacted by a ballot printing issue which required much manual intervention to properly process the effected ballots. Despite this, the Election was performed accurately and within the statutory timeframes. Our experiences with the Primary Election, along with the appointment of a new ROV, provided for a smooth General Election.

Going forward, and in order to increase election integrity and transparency, our Board has established an Elections Advisory Committee (EAC). The purpose of the EAC is to increase voter confidence, public trust, and voter engagement in the County. The ROV Office has also been restructured and expanded to provide more capacity and oversight over elections activity. We are positioning our ROV Office for successful, voter-engaged activities for the 2024 Presidential Primary and General Elections.

***“The way to get started is to quit talking and begin doing.”***

*— Walt Disney*

### **San Joaquin General Hospital (SJGH) Management Services Agreement (MSA)**

Beginning July 1, 2022, the County entered into a MSA between SJGH and Dignity Health (a component of CommonSpirit Health). The purpose of the MSA is to leverage on the expertise and resources of Dignity Health to enhance the clinical and financial operations of SJGH. As a part of this MSA, a new Chief Executive Officer was installed at SJGH along with other key executive staff. The new management team has been implementing clinical, operational, and fiscal best practices, and streamlining functions to optimize efficiency and effectiveness.

In addition to strengthening the SJGH management team, the MSA has provided the opportunity to utilize Dignity’s vendor base to take advantage of pricing for a variety of medical and non-medical materials and supplies. This process is still in the early stages, and we look forward to expanding this beneficial process further within SJGH and also to our other County healthcare functions outside the hospital.

The initial 18-month phase of the MSA will conclude in the middle of the upcoming fiscal year, and we are looking to extend that phase. Plans are currently in progress regarding the length of this extension and how we might eventually move toward a second phase of this MSA. I am looking forward to more discussion about this subsequent phase in next year’s budget message!

***“Money is a terrible master but an excellent servant.”***

*— P. T. Barnum*

### **American Rescue Plan Act (ARPA) Funds Deployment**

The County continues to deploy the ARPA funds received to offset the economic effects of COVID-19. These funds totaled \$148 million and were received in two tranches the past two fiscal years. Our goal has been to get these funds into our community as judiciously and quickly as possible, and we have committed nearly all of these funds to date.

Last fall, our organization committed the \$74 million second allocation of ARPA funds for a variety of projects which targeted high priorities within our County. These projects included transitional and supportive housing, the expansion of behavioral health workforce in the County, improvements to veterans’ facilities, mitigation of illegal dumping, and numerous projects within County departments and fire agencies which benefit our County and constituents.

These spending priorities were developed in the previous fiscal year based on a recovery plan, constituent survey, Board feedback, and County business groups. Our spending plan will deploy the related funds over the next several years and will be fully deployed by the required Federal deadline of December 2026. We look forward to seeing the improvement these expenditures provide in our communities.

***“The miracle is this: The more we share, the more we have.”***

*— Leonard Nimoy*

### **Property Tax Sharing Agreements with Cities**

During this past fiscal year, our County was approached by the cities of Lathrop and Lodi to ask about addressing long-standing issues related to property tax sharing agreements. These agreements are designed to be structured so the

County and a city receive an appropriate property tax share when an annexation occurs. This tax sharing should be equitable so that each jurisdiction is able to cover its cost of services in the newly annexed area.

For Lathrop, a long-standing anomaly was resolved which had resulted from a change in land use impacting the West Lathrop Specific Plan development, primarily impacting the River Islands development. We were happy to be able to remediate this with Lathrop so development could move forward in the area without a detrimental fiscal impact to the city.

Lodi had not had any agreement with the County since 2012 due to the inability to come to terms on a sharing amount. In January 2023, we were able to come to an agreement that provides economic benefits to both Lodi and the County for upcoming annexations in the city's sphere of influence.

Our County appreciates the collaborative efforts the city staff in both Lathrop and Lodi provided during these negotiations. It is a pleasure to have such great partners within our community!

***“Blizzards, floods, volcanos, hurricanes, earthquakes: They fascinate because they nakedly reveal that Mother Nature, afflicted with bipolar disorder, is as likely to snuff us as she is to succor us.”***

***— Dean Koontz***

## **Floods**

For many years now, California has seen severe drought conditions. The beginning of 2023 abruptly changed that and pivoted our County into a flood situation not seen in several decades. Emergency Operations commenced on New Year's Day and lasted throughout the month of January. Although we experienced flooding in residential areas, we were fortunate it was localized. Furthermore, emergency responses were swift and expansive, which mitigated the impacts significantly.

And just as we hoped things had moderated in the middle of January, storms resumed in March. These storms have created a record snowpack in the Sierras, which will keep us under flood watch until at least this summer. The good news is that our State's reservoirs are filling and groundwater is charging, something we have been desperately wanting for quite some time...just not all at once!

***“You have brains in your head. You have feet in your shoes. You can steer yourself in any direction you choose.”***

***— Dr. Seuss***

## **Specific Measurable Achievable Relevant Timely (SMART) Goals**

We have presented, for the first time ever in our County budget book, SMART goals for each of our departments. These goals have been developed from the Board's Three-Year Strategic Priorities set forth in May 2022. These SMART goals will create accountability for all of our department leaders to attain the objectives which support our overall organizational strategy.

These goals were created with much thoughtful effort from our management teams and their staffs, and I certainly appreciate the work it took to get this process started. We now have a well-defined road map to get from where we are to where we want to be as an organization. I encourage all who read this book to look through these departments and see the details of how they will move effectively forward during the coming years. These goals are the product of much innovative thinking, lots of good stuff.



## 2023-2024 Adopted Budget

The CAO is pleased to submit the 2023-2024 Adopted Budget, which is structurally balanced and provides resources for the Board's top priorities, and includes changes made by the Board during the Final Budget Hearing on June 20, 2023. This balanced budget fully funds current departmental staffing levels and, where appropriate, augments staffing to address critical operational needs. It transfers prior-year funding to reserves for future costs related to labor and Countywide information system improvements, and provides funding to support many significant capital projects.

The 2023-2024 Adopted Budget totals \$2.6 billion and reflects an increase of \$370.8 million when compared to the 2022-2023 adjusted budget. While the 2023-2024 Adopted Budget is structurally balanced, it is essential the County continue its focus on fiscal sustainability and maximize all available resources to lessen the burden on the General Fund. To this end, the County will:

- Negotiate only affordable and sustainable labor agreements;
- Assess the County's retirement rates and funding ratio in the event there is a significant increase in the retirement rates or reduction in the funding ratio;
- Advocate for the County's retention of its allotted share of property tax revenues;
- Use an objective analytical approval to determine if it can afford to assume new debt;
- Improve the revenue cycle and reduce operational costs of San Joaquin General Hospital;
- Only fill those positions that are necessary in anticipation of revenue shortfalls from the State and Federal governments; and
- Adhere to the County's No-Backfill Policy when reductions occur.

These practices will provide the foundation necessary for sustaining a structurally-balanced budget, now and in the future.

The 2023-2024 Adopted Budget has been carefully designed to serve the public interest, while at the same time remain fiscally sound. Many hours of hard work and collaboration were spent by the County's dedicated employees and executives to develop this spending plan. It is their talent, creative thinking, understanding, and commitment to public service that help make San Joaquin County such a thriving community.

**Budget Assumptions** – In the initial development of the Proposed Budget, the year-end available fund balance projections were developed utilizing midyear and third-quarter projections. The June 30, 2023 year-end fund balance is estimated at approximately \$180.0 million, much of which is transferred to reserves.

Utilizing the June 30, 2023 year-end fund balance, the Adopted Budget transfers \$40.0 million to the Approved Labor Agreements Reserve for future costs of existing labor contracts, \$40.0 million to the County Systems Automation Reserve for future costs related to the implementation of the Enterprise Resource Planning (ERP) system, \$16.6 million to the Capital Outlay Fund as unprogrammed funds to be used for various capital projects, and \$16.6 million to the Unfunded Pension Reserve.

**Labor** – Employee salary and benefit costs comprise approximately 45.6% of County's Adopted Budget. As of the writing of this message, the County has current labor agreements with 100% of the County labor force, and only one is set to expire at the end of 2022-2023. The Adopted Budget includes funding for all labor increases in 2023-2024, estimated at approximately \$100.2 million Countywide, or approximately \$28.0 million in the General Fund. Ten percent of the County's represented labor force works under a Memorandum of Understanding (MOU) that is set to expire during 2023-2024. Costs from these negotiations are unknown at this time; therefore, no cost increases are included in the Adopted Budget.

**Retirement** – In 2015-2016, the Board adopted a policy to contribute up to 5.0% additional funding toward the County's unfunded retirement liability. Through December 31, 2022, the total value of this 5.0% contribution is approximately \$189.3 million.

The 2023-2024 Adopted Budget includes \$30.5 million for contributions toward the unfunded retirement liability with a Net County Cost of \$10.4 million. The fund balance of the Unfunded Pension Reserve as of March 31, 2023 is \$53.0 million, and the Adopted Budget adds \$16.6 million to the Reserve.

**Health Insurance** – The County offers self-insured and fully-insured health plan options, including health maintenance organization (HMO) plans and high deductible health plan (HDHP) options for Kaiser Permanente and Sutter Health Plus for nearly all of its employees. The rates for Kaiser Permanente health insurance are projected to increase by 4.3%, while rates for the self-insured plans and Sutter Health Plus plans are projected to increase by 5.6% and 3.5% respectively. Dental insurance rates are projected to decrease by 40.0% due to the planned use of reserves. This is a one-time rate reduction, as rates are expected to return to normal in 2024-2025.

## Financial Overview

Appropriations in the 2023-2024 Adopted Budget total \$2.6 billion. This represents an increase of \$370.8 million from the 2022-2023 adjusted budget. Property tax revenue, the major source of General Purpose Revenue in San Joaquin County, is expected to grow by 5.0%, following actual increases of 9.38% and 6.73% in 2022-2023 and 2021-2022, respectively.

The Adopted Budget provides for increases in salaries and benefits stipulated in the existing labor agreements. In addition, the budget includes significant State and Federal revenues for health and human services programs, law and justice activities, and transportation projects. The budget includes the use of \$102.5 million of General Fund balance from the prior year, transferring funding to reserves for future balancing. Overall, \$2.2 billion, or 84.6% of the budget is provided by departmental revenues including State and Federal funding, charges for services, a one-time General Fund contribution, and non-General Fund available year-end fund balances. The remaining \$398.5 million is funded by General Purpose Revenue.

## All Funds

The 2023-2024 Adopted County Budget totals \$2,591,302,580, which is an increase of \$370,768,526 or 16.7% from the 2022-2023 adjusted budget. This includes the General Fund, Special Revenue Funds, Capital Project Funds, and four Enterprise operations. The appropriations and sources of funding are summarized below:

All Funds	2022-2023 Adjusted	2023-2024 Adopted	Increase/ (Decrease)
<b>Appropriations</b>			
Departmental Appropriations	\$2,216,167,436	\$2,588,085,868	\$371,918,432
Appropriation for Contingencies	4,366,618	3,216,712	(1,149,906)
<b>Total Appropriations</b>	<b>\$2,220,534,054</b>	<b>\$2,591,302,580</b>	<b>\$370,768,526</b>
<b>Sources of Funding</b>			
Departmental Revenues	\$1,830,699,496	\$2,054,295,808	\$223,596,312
General Purpose Revenues	368,479,065	398,526,000	30,046,935
Fund Balance			
General Fund	35,877,113	102,463,901	66,586,788
All Other Funds	(14,521,620)	36,016,871	50,538,491
<b>Total Sources of Funding</b>	<b>\$2,220,534,054</b>	<b>\$2,591,302,580</b>	<b>\$370,768,526</b>

## General Fund

The 2023-2024 Adopted General Fund Budget totals \$1,335,095,562, which includes an allocation of \$3.2 million for the Contingency Provision budget. General Funds represent approximately 51.5% of the overall County budget and the Appropriations and Sources of Funding are as follows:

General Funds	2022-2023 Adjusted	2023-2024 Adopted	Increase/ (Decrease)
<b>Appropriations</b>			
Departmental Appropriations	\$1,140,262,497	\$1,331,878,850	\$191,616,353
Appropriation for Contingencies	4,366,618	3,216,712	(1,149,906)
Total Appropriations	\$1,144,629,115	\$1,335,095,562	\$190,466,447
Departmental Revenues	740,272,937	834,105,661	93,832,724
<b>Net County Cost</b>	<b>\$404,356,178</b>	<b>\$500,989,901</b>	<b>\$96,633,723</b>
<b>Sources of Funding</b>			
General Purpose Revenues	\$368,479,065	\$398,526,000	\$30,046,935
Fund Balance			
General Fund	35,877,113	102,463,901	66,586,788
<b>Total Sources of Funding</b>	<b>\$404,356,178</b>	<b>\$500,989,901</b>	<b>\$96,633,723</b>

## Financial Analysis

### Appropriations

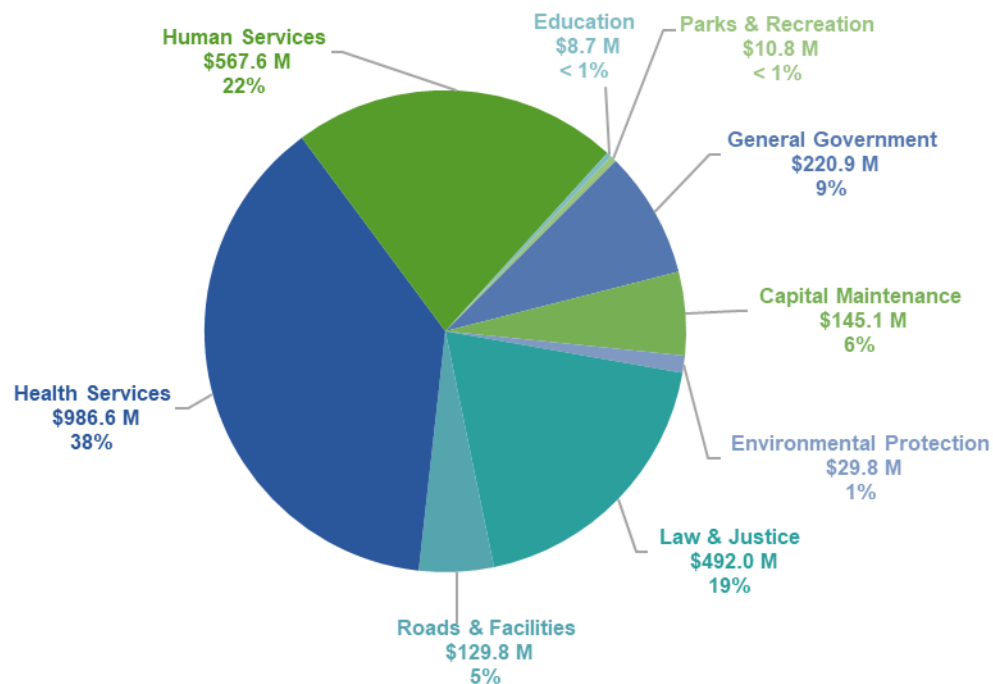
Appropriations are primarily based on the current State/County funding relationship. In the event State funding is less than the anticipated amounts as a result of the final State Budget, a commensurate reduction in local expenditures will be necessary, consistent with the County's Grant Funding Policy Guidelines (B-02-106). The guidelines are as follows:

- Funding over-matches for State and Federal grants shall be avoided.
- Grant funding resources should be maximized to meet community needs and to minimize Net County Cost.
- Program managers experiencing grant funding reductions or elimination will seek other non-County funding sources.
- When outside resources are exhausted, program managers will be directed to eliminate ongoing costs and/or develop plans for short-term program phase out.
- Any exceptions to these guidelines shall be limited to emergencies or to the support of critical Board Strategic Priorities, and must be reviewed and approved by the Board of Supervisors on a case-by-case basis.



The appropriations by functional area are as follows:

## 2023-2024 Appropriations \$2.59 Billion



Overall, appropriations increased \$370.8 million, primarily due to salary and benefit increases, investments in capital projects, increases in State and Federal funding, and General Fund transfers to reserves. Changes in the 2023-2024 appropriations by functional area are noted below:

➤ **General Government is projected to increase by \$55.0 million.**

General Government				
	2022-2023 Adjusted Budget	2023-2024 Adopted	Increase/(Decrease)	
			Amount	Percentage
Salaries & Benefits	\$49,288,394	\$55,026,653	\$5,738,259	11.64%
Services & Supplies	27,701,548	27,633,305	(68,243)	-0.25%
Centrally-Budgeted Expenses	15,273,873	14,659,354	(614,519)	-4.02%
Other Charges & Uses	360,961	464,000	103,039	28.55%
Capital Expenditures	1,239,311	5,638,937	4,399,626	355.01%
Operating Transfers Out	99,974,956	148,387,209	48,412,253	48.42%
Provision for Contingencies	3,981,618	3,216,712	(764,906)	-19.21%
Cost Reimbursements	(31,869,539)	(34,107,829)	(2,238,290)	7.02%
<b>Total</b>	<b>\$165,951,122</b>	<b>\$220,918,341</b>	<b>\$54,967,219</b>	<b>33.12%</b>

- **Capital Maintenance and Improvement is projected to increase by \$87.6 million.**

<b>Capital Maintenance and Improvement</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$8,371,340	\$9,297,159	\$925,819	11.06%
Services & Supplies	11,157,872	13,123,752	1,965,880	17.62%
Centrally-Budgeted Expenses	701,598	987,385	285,787	40.73%
Other Charges & Uses	15,019,202	406,350	(14,612,852)	-97.29%
Capital Expenditures	38,921,000	137,797,335	98,876,335	254.04%
Cost Reimbursements	(16,707,226)	(16,569,774)	137,452	-0.82%
<b>Total</b>	<b>\$57,463,786</b>	<b>\$145,042,207</b>	<b>\$87,578,421</b>	<b>152.41%</b>

- **Environmental Protection is projected to increase by \$1.8 million.**

<b>Environmental Protection</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$18,984,773	\$20,973,135	\$1,988,362	10.47%
Services & Supplies	8,756,197	8,578,370	(177,827)	-2.03%
Centrally-Budgeted Expenses	3,267,903	3,470,566	202,663	6.20%
Other Charges & Uses	253,220	259,638	6,418	2.53%
Capital Expenditures	1,541,850	1,592,492	50,642	3.28%
Operating Transfers Out	120,700	800	(119,900)	-99.34%
Cost Reimbursements	(4,886,631)	(5,026,760)	(140,129)	2.87%
<b>Total</b>	<b>\$28,038,012</b>	<b>\$29,848,241</b>	<b>\$1,810,229</b>	<b>6.46%</b>

- **Law and Justice is projected to increase by \$51.4 million.**

<b>Law and Justice</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$315,156,968	\$353,825,642	\$38,668,674	12.27%
Services & Supplies	88,328,890	97,027,886	8,698,996	9.85%
Centrally-Budgeted Expenses	38,777,764	40,428,411	1,650,647	4.26%
Other Charges & Uses	2,979,883	2,572,602	(407,281)	-13.67%
Capital Expenditures	4,419,704	7,003,057	2,583,353	58.45%
Operating Transfers Out	15,416,787	18,081,189	2,664,402	17.28%
Cost Reimbursements	(24,488,846)	(26,920,257)	(2,431,411)	9.93%
<b>Total</b>	<b>\$440,591,150</b>	<b>\$492,018,530</b>	<b>\$51,427,380</b>	<b>11.67%</b>

- **Roads and Facilities is projected to increase by \$4.5 million.**

<b>Roads and Facilities</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$31,126,704	\$33,823,045	\$2,696,341	8.66%
Services & Supplies	20,977,037	22,305,364	1,328,327	6.33%
Centrally-Budgeted Expenses	5,206,669	4,833,754	(372,915)	-7.16%
Other Charges & Uses	327,920	106,420	(221,500)	-67.55%
Capital Expenditures	21,339,795	10,448,109	(10,891,686)	-51.04%
Operating Transfers Out	389,890	883,000	493,110	126.47%
Loan to Other Funds	1,530,000	1,530,000	0	0.00%
Public Works Project Expense	56,043,565	67,335,826	11,292,261	20.15%
Cost Reimbursements	(11,656,521)	(11,466,023)	190,498	-1.63%
<b>Total</b>	<b>\$125,285,059</b>	<b>\$129,799,495</b>	<b>\$4,514,436</b>	<b>3.60%</b>

- **Health Services is projected to increase by \$87.4 million.**

<b>Health Services</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$484,613,154	\$521,539,649	\$36,926,495	7.62%
Services & Supplies	373,097,545	437,521,744	64,424,199	17.27%
Centrally-Budgeted Expenses	22,122,766	26,259,608	4,136,842	18.70%
Other Charges & Uses	10,535,845	5,635,236	(4,900,609)	-46.51%
Capital Expenditures	17,922,052	19,369,757	1,447,705	8.08%
Operating Transfers Out	56,346,123	49,801,123	(6,545,000)	-11.62%
Cost Reimbursements	(65,377,182)	(73,511,807)	(8,134,625)	12.44%
<b>Total</b>	<b>\$899,260,303</b>	<b>\$986,615,310</b>	<b>\$87,355,007</b>	<b>9.71%</b>

- **Human Services is projected to increase by \$80.0 million.**

<b>Human Services</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$156,908,795	\$183,349,848	\$26,441,053	16.85%
Services & Supplies	98,699,764	117,952,253	19,252,489	19.51%
Centrally-Budgeted Expenses	8,615,205	10,390,088	1,774,883	20.60%
Other Charges & Uses	229,288,277	261,109,339	31,821,062	13.88%
Capital Expenditures	7,786,622	10,548,882	2,762,260	35.47%
Cost Reimbursements	(13,731,839)	(15,792,926)	(2,061,087)	15.01%
<b>Total</b>	<b>\$487,566,824</b>	<b>\$567,557,484</b>	<b>\$79,990,660</b>	<b>16.41%</b>

- **Education is projected to decrease by \$350,992.**

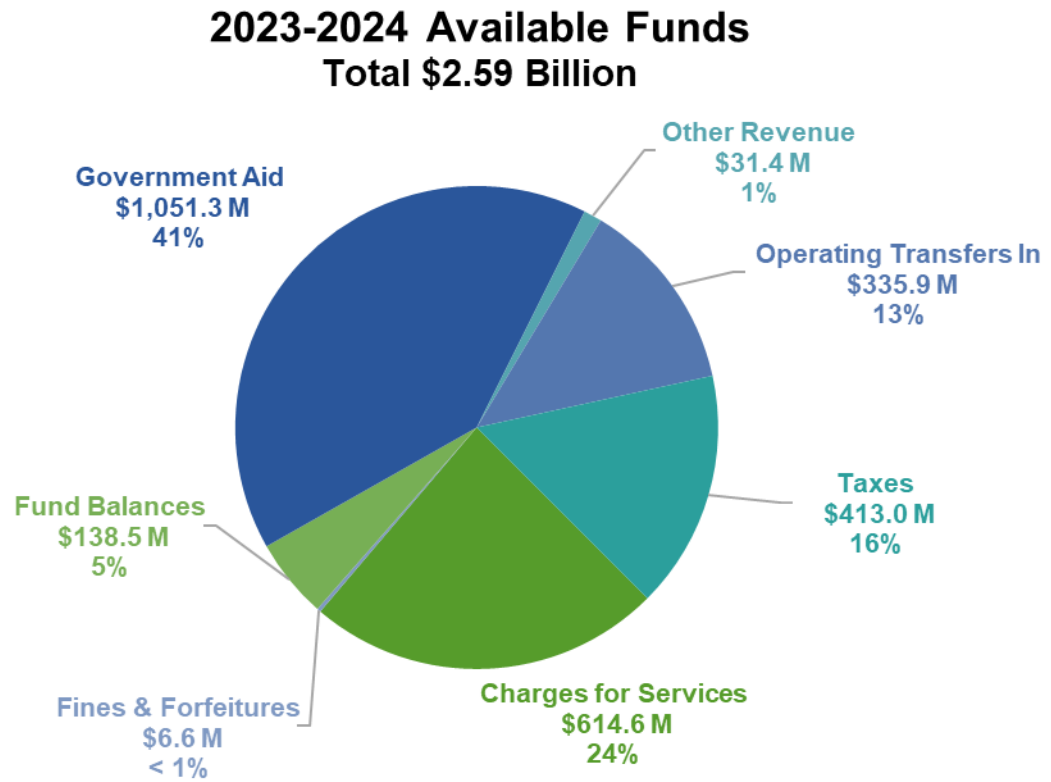
<b>Education</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$324,340	\$379,683	\$55,343	17.06%
Services & Supplies	219,544	259,541	39,997	18.22%
Centrally-Budgeted Expenses	497,976	495,644	(2,332)	-0.47%
Other Charges & Uses	8,001,536	7,557,536	(444,000)	-5.55%
<b>Total</b>	<b>\$9,043,396</b>	<b>\$8,692,404</b>	<b>(\$350,992)</b>	<b>-3.88%</b>

- **Parks and Recreation is projected to increase by \$3.5 million.**

<b>Parks and Recreation</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Salaries & Benefits	\$4,192,833	\$4,661,250	\$468,417	11.17%
Services & Supplies	1,812,575	2,040,251	227,676	12.56%
Centrally-Budgeted Expenses	926,754	2,135,335	1,208,581	130.41%
Other Charges & Uses	643,956	2,268,652	1,624,696	252.30%
Capital Expenditures	144,500	133,000	(11,500)	-7.96%
Cost Reimbursements	(386,216)	(427,920)	(41,704)	10.80%
<b>Total</b>	<b>\$7,334,402</b>	<b>\$10,810,568</b>	<b>\$3,476,166</b>	<b>47.40%</b>

## Available Funds

The 2023-2024 adopted expenditure plan is financed with the following estimates of available funding sources:



Overall, sources of funding are expected to increase by \$370.8 million, or 16.7% from the 2022-2023 adjusted budget. Notable changes in the 2023-2024 available funds by revenue category are reflected below:

- **Aid from Other Governments is projected to increase by \$154.6 million.**

	2022-2023 Adjusted Budget	2023-2024 Adopted	Increase/(Decrease)	
			Amount	Percentage
General Government	\$8,236,767	\$11,016,937	\$2,780,170	33.75%
Capital Maintenance and Improvement	0	36,511,286	36,511,286	N/A
Environmental Protection	7,188,350	7,467,127	278,777	3.88%
Law and Justice	196,947,798	221,944,030	24,996,232	12.69%
Roads and Facilities	54,022,361	49,393,435	(4,628,926)	-8.57%
Health Services	182,979,823	201,473,620	18,493,797	10.11%
Human Services	446,958,866	523,194,952	76,236,086	17.06%
Education	351,600	263,443	(88,157)	-25.07%
<b>Total</b>	<b>\$896,685,565</b>	<b>\$1,051,264,830</b>	<b>\$154,579,265</b>	<b>17.24%</b>

- **Other Financing Sources and Special Revenues for Solid Waste, Hospital, and Airport are projected to increase by \$27.1 million.**

<b>Other Financing Sources and Special Revenues (Solid Waste, Hospital, and Airport)</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
Capital Maintenance and Improvement	\$56,082	\$56,082	\$0	0.00%
Roads and Facilities	14,216,155	13,605,193	(610,962)	-4.30%
Health Services	416,856,559	444,568,448	27,711,889	6.65%
<b>Total</b>	<b>\$431,128,796</b>	<b>\$458,229,723</b>	<b>\$27,100,927</b>	<b>6.29%</b>

- **Taxes (including property taxes and sales tax) are projected to increase by \$26.2 million.**

<b>Taxes</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
General Government	\$353,201,825	\$378,666,000	\$25,464,175	7.21%
Law and Justice	256,188	370,730	114,542	44.71%
Roads and Facilities	23,522,458	23,317,463	(204,995)	-0.87%
Education	9,841,835	10,640,896	799,061	8.12%
<b>Total</b>	<b>\$386,822,306</b>	<b>\$412,995,089</b>	<b>\$26,172,783</b>	<b>6.77%</b>

- **Charges for Services are projected to increase by \$9.2 million.**

<b>Charges for Services</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
General Government	\$18,650,861	\$13,882,461	(\$4,768,400)	-25.57%
Capital Maintenance and Improvement	238,963	242,887	3,924	1.64%
Environmental Protection	2,507,502	2,104,750	(402,752)	-16.06%
Law and Justice	6,475,502	6,152,514	(322,988)	-4.99%
Roads and Facilities	8,141,000	5,921,000	(2,220,000)	-27.27%
Health Services	108,624,319	125,710,177	17,085,858	15.73%
Human Services	674,328	565,941	(108,387)	-16.07%
Education	43,892	43,892	0	0.00%
Parks and Recreation	1,822,572	1,790,909	(31,663)	-1.74%
<b>Total</b>	<b>\$147,178,939</b>	<b>\$156,414,531</b>	<b>\$9,235,592</b>	<b>6.28%</b>



- **Operating Transfers In are projected to increase by \$30.8 million.**

<b>Operating Transfers In</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Increase/(Decrease)</b>	
	<b>Adjusted Budget</b>	<b>Adopted</b>	<b>Amount</b>	<b>Percentage</b>
General Government	\$13,835,765	\$15,989,057	\$2,153,292	15.56%
Capital Maintenance and Improvement	44,540,202	44,018,143	(522,059)	-1.17%
Environmental Protection	1,564,627	1,553,604	(11,023)	-0.70%
Law and Justice	31,118,559	32,585,126	1,466,567	4.71%
Roads and Facilities	13,427,325	2,846,789	(10,580,536)	-78.80%
Health Services	141,734,181	162,825,401	21,091,220	14.88%
Human Services	13,418,981	1,248,417	(12,170,564)	-90.70%
Parks and Recreation	400,500	464,000	63,500	15.86%
Contingency	45,122,230	74,426,898	29,304,668	64.95%
<b>Total</b>	<b>\$305,162,370</b>	<b>\$335,957,435</b>	<b>\$30,795,065</b>	<b>10.09%</b>

- Use of Fund Balance for operations is projected to increase overall by \$191.6 million compared to the 2022-2023 Adjusted Budget, primarily due to the use of General Fund balance for transfers to reserves.

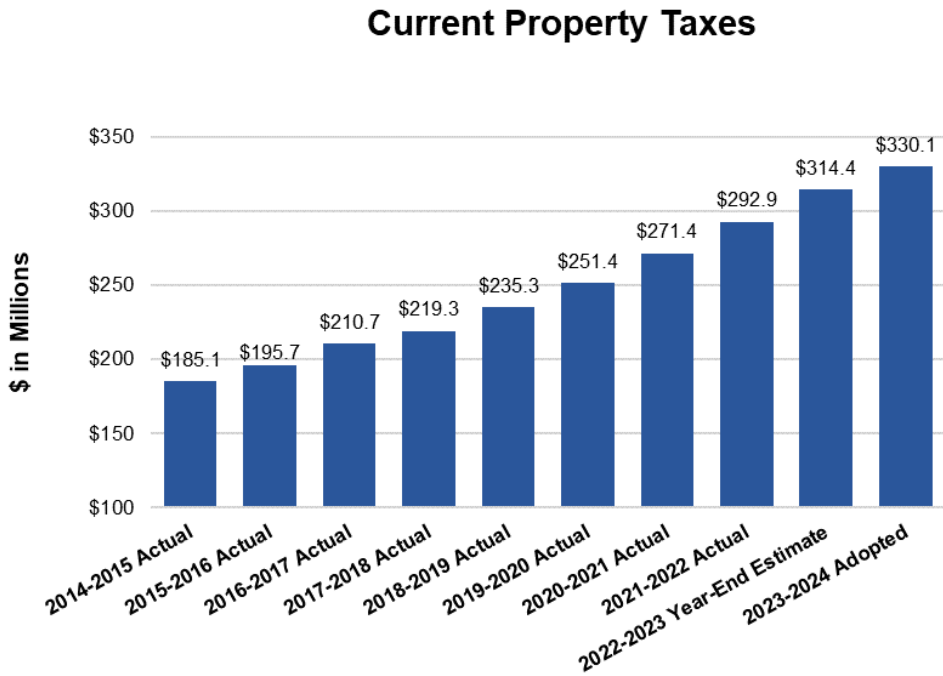
Changes in the General Purpose Revenue sources that support the \$398.5 million Net County Cost include:

<b>General Purpose Revenue (\$ In Millions)</b>				
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Amount</b>	<b>Percent</b>
	<b>Adjusted</b>	<b>Adopted</b>		
Current Property Taxes	\$306.4	\$330.1	\$23.7	7.7%
Sales Tax	35.0	33.5	(1.5)	-4.3%
Redevelop. Pass Through	5.5	7.3	1.8	32.7%
Penalties on Delinquent Property Taxes	2.6	3.6	1.0	38.5%
Property Transfer Taxes	5.5	5.5	0.0	0.0%
Franchise Fees	3.1	3.1	0.0	0.0%
Homeowner Exemption	1.2	1.2	0.0	0.0%
Other Taxes	5.3	8.7	3.4	64.2%
Other Revenues	1.4	1.0	(0.4)	-28.6%
Interest Income	2.0	4.0	2.0	100.0%
Vehicle License Fees	0.5	0.5	0.0	0.0%
<b>Total GPR</b>	<b>\$368.5</b>	<b>\$398.5</b>	<b>\$30.0</b>	<b>8.1%</b>

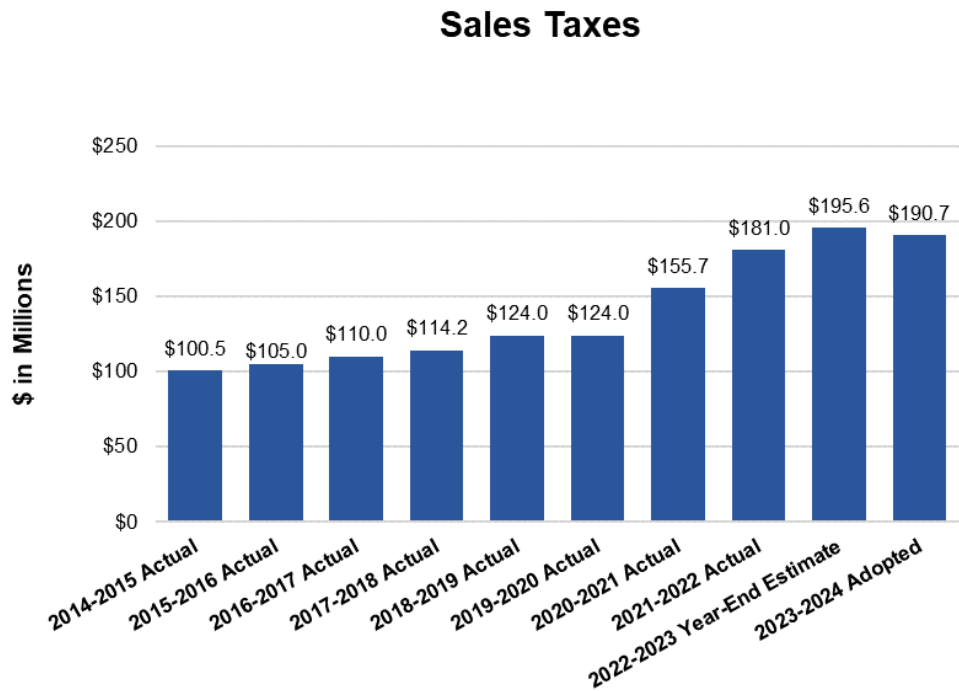
As shown in the table above, Current Property Taxes and Sales Tax are the two main sources of the County's General Purpose Revenue. Combined, they provide \$363.6 million in support of the County budget and represent 91.2% of the ongoing General Purpose Revenue. These revenue sources are extremely sensitive to the economic upswings and downturns.

The County is projecting an increase in property tax revenue for 2023-2024 of 5.0% from the 2022-2023 year-end estimates. The 2023-2024 property tax revenue is projected at \$330.1 million, which is an increase of \$23.7 million from the 2022-2023 adjusted budget.

The following chart depicts the Current Property Taxes for 2014-2015 to 2023-2024:



The 2022-2023 year-end estimates for Sales Taxes, including the County’s General Purpose Revenue, Proposition 172, and Realignment-Social Services total \$195.6 million. The 2023-2024 Adopted Budget assumes \$190.7 million, a decrease of 2.5%. The following chart depicts the Sales Taxes for 2014-2015 to 2023-2024. Sales Tax revenue included as part of General Purpose Revenue is projected to decrease by 1.5% from 2022-2023 year-end estimates, and Realignment revenue is projected to remain relatively flat. Proposition 172 revenue is estimated to decrease by approximately 4.0% from the 2022-2023 year-end estimate of \$119.0 million, when it was at its peak. Proposition 172 revenue nearly doubled between 2018-2019 and 2022-2023, primarily due to the increase in sales of taxable goods during the pandemic, which increased San Joaquin County’s pro rata share of the State’s Sales Tax pool for several years. Now that sales activity has begun to level off, the County’s pro rata share is projected to decline.



## Staffing Analysis

The County workforce is comprised of employees who hold permanently allocated positions and those who work in temporary, extra-help, and contract capacities. The following table illustrates the changes in overall allocated staffing for 2023-2024:

Staffing	2022-2023	2023-2024	Increase/(Decrease)	
	Adjusted*	Adopted	Amount	Percent
General Government	509.3	525.2	15.9	3.1%
Capital Maintenance	65.1	67.5	2.4	3.7%
Environmental Protection	155.1	159.4	4.3	2.8%
Law & Justice	2,000.0	1,984.3	(15.7)	-0.8%
Roads & Facilities	250.8	250.2	(0.6)	-0.2%
Health Services	3,466.3	3,477.5	11.2	0.3%
Human Services	1,466.7	1,528.5	61.8	4.2%
Education	4.0	4.0	0.0	0.0%
Parks & Recreation	49.1	50.1	1.0	2.0%
<b>Total Staffing</b>	<b>7,966.4</b>	<b>8,046.7</b>	<b>80.3</b>	<b>1.0%</b>
<i>*Totals include midyear adjustments approved by the Board of Supervisors.</i>				

There is an overall increase of 80.3 full-time equivalent (FTE) positions. The 80.3 FTEs are comprised of a net decrease of 94.7 FTE part-time positions and the net addition of 175 full-time allocations, which is comprised of 251 added positions and 76 deleted positions.

### Major Additions

- 251 full-time allocated positions are approved for addition. Below are some of the major additions by department:

Department	Additions
➤ Human Services Agency	69
➤ San Joaquin General Hospital	56
➤ Behavioral Health	48
➤ District Attorney	12
➤ Sheriff	8
➤ Public Works	8
➤ Whole Person Care	8
➤ Registrar of Voters	7

### Administrative Allocation Correction

To ensure transparency and accurate position allocation management, as part of the Countywide budget process, the Human Resources Division reviewed the current allocations of County departments to determine if any allocations were filled with a class not originally requested and authorized. Administrative Manual Section 2501 authorizes departments to underfill, the filling of an allocation at a lower salary than allocated, for a period not to exceed 12 months. Appropriate underfills such as multi-allocated or authorized block budget allocations were excluded from the administrative review process. Human Resources also determined if any block-budgeted positions were allocated at the incorrect level of the block.

As a result of this review, 45 allocations were identified that require administrative correction; in each case the department provided consent for the administrative allocation change. The following list of positions will be administratively corrected as part of this budget process. Please note, the administrative corrections will not affect the salary costs departments included in the 2023-2024 budgets. The incumbent salary, not the allocated position salary, is presented for Board of Supervisors' consideration.

POS #	BUDGET UNIT #	BUDGET UNIT NAME	CURRENT JOB CODE	CURRENT ALLOCATION	REVISED JOB CODE	REVISED ALLOCATION
10627	1014200000	GSD-Facilities Management	RC0402	Crafts Worker II	RC2011	Storekeeper I
19284	1014300000	GSD-Capital Projects	RE0101	Senior Engineering Aide	RO6700	Office Technician/Coordinator
17376	1014300000	GSD-Capital Projects	RE0101	Senior Engineering Aide	RO3011	Accounting Technician I
17789	1014300000	GSD-Capital Projects	RE1004	Engineer IV	RM0226	Management Analyst III
10670	1016000000	Surveyor	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
18059	2020200000	District Attorney	EL2390	Assistant District Attorney	EL2391	Chief Deputy District Attorney
19328	2021620000	Sheriff-Patrol	RP1003	Deputy Sheriff II	RB0205	Public Information Specialist
12086	2022700000	Probation-Juvenile	RP2004	Probation Unit Supervisor	RP2003	Probation Officer III
18823	2022700000	Probation-Juvenile	RS3410	Social Worker Supervisor I	RS3005	Social Worker Supervisor
16902	2023060000	Water Resources	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12602	3030103000	Public Works - Engineering	RE1004	Engineer IV	RE0113	Engineering Assistant III
16390	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
17506	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
18844	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12590	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12591	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12593	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12594	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12595	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12596	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12597	3030103000	Public Works - Engineering	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12645	3030105000	Public Works - Road Maintenance	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
12752	3030108000	Public Works - Development Svcs	RE0111	Engineering Assistant I	RE0112	Engineering Assistant II
13018	4040500000	HCS - Mental Health Services	RH6602	Rehabilitation Therapist II	RH7800	Psychiatric Rehab Therapy Asst.
17198	4040500000	HCS - Mental Health Services	RH1123	Staff Nurse III-Ambulatory	RH1505	MH Charge Nurse-Inpatient
17199	4040500000	HCS - Mental Health Services	RH1123	Staff Nurse III - Ambulatory	RH1505	MH Charge Nurse-Inpatient
19673	4040500000	HCS - Mental Health Services	RH1123	Staff Nurse III - Ambulatory	RH1505	MH Charge Nurse-Inpatient
19379	4040500000	HCS - Mental Health Services	RH1106	Staff NurseV-AsstNDptMg-Inpat	RH1505	MH Charge Nurse-Inpatient
19380	4040500000	HCS - Mental Health Services	RH1106	Staff NurseV-AsstNDptMg-Inpat	RH1505	MH Charge Nurse-Inpatient
19381	4040500000	HCS - Mental Health Services	RH1106	Staff NurseV-AsstNDptMg-Inpat	RH1505	MH Charge Nurse-Inpatient
17814	4040500000	HCS - Mental Health Services	RS2002	Mental Health Specialist II	RH2502	Senior Psychiatric Technician
18737	4040500000	HCS - Mental Health Services	RS2002	Mental Health Specialist II	RH2502	Senior Psychiatric Technician
18744	4040700000	HCS - Behavioral Health Admin	RH1505	Mental Health Charge Nurse-Inp	RH2502	Senior Psychiatric Technician
18745	4040700000	HCS - Behavioral Health Admin	RH1505	Mental Health Charge Nurse-Inp	RB6512	Management Analyst II
13775	4042000000	Environmental Health Svcs	RO2050	Administrative Secretary	RO1000	Office Supervisor
10049	5055103000	EEDD	RO1500	Senior Administrative Supervisor	RO6700	Office Technician/Coordinator
16361	8240000000	Information Systems Div - ISF	RI1102	Department Info Systems Analyst II	RI1323	Info Systems Specialist III
16358	8240000000	Information Systems Div - ISF	RI1003	Information Systems Analyst III	RI1004	Information Systems Analyst IV
16131	8260000000	Central Telephone	RI1003	Information Systems Analyst III	RI1004	Information Systems Analyst IV
17334	8260000000	Central Telephone	RI1003	Information Systems Analyst III	RI1004	Information Systems Analyst IV
15182	9221100000	S J General Hospital	RH3001	Nursing Assistant	RH0201	Hospital Unit Clerk

POS #	BUDGET UNIT #	BUDGET UNIT NAME	CURRENT JOB CODE	CURRENT ALLOCATION	REVISED JOB CODE	REVISED ALLOCATION
19110	9221100000	S J General Hospital	RH1106	Staff NurseV-AsstNDptMg-Inpat	RM0860	Manager of Sterile Proc Svcs
15510	9221100000	S J General Hospital	RH2002	Sr Licensed Vocational Nurse	RH2060	Dialysis Patient Care Technician
15530	9221100000	S J General Hospital	RH1106	Staff NurseV-AsstNDptMg-Inpat	RS3042	Clinical Social Worker II
15637	9221100000	S J General Hospital	RH4930	Medical Technician	RH4902	Laboratory Assistant II

## State Budget Status

Governor Newsom's May Revision was released on May 12, 2023 and proposes a \$306.5 billion budget, of which \$224.0 billion is General Fund. The May Revision added \$9.3 billion to January's projected budget deficit, which now totals a \$31.5 billion shortfall.

The projected budget shortfall and overall fiscal uncertainty is due to the State's progressive tax structure and market volatility, uncertainties around the Federal debt ceiling impasse, higher interest rates, ambiguity in financial institutions, and a projected \$42.0 billion delay in tax receipts as 55 of California's 58 counties were granted an October 2023 tax filing extension. The delay of income tax payments adds to the speculative May Revision revenue forecast.

Adjustments for the extra \$9.3 billion shortfall include:

- Revenue Borrowing \$3.7 billion
- General Fund Shifts \$3.3 billion
- Unspent Funds/Reductions \$1.1 billion
- Funding Delays \$695.0 million
- Reserve Withdrawals \$450.0 million

The Governor assured his commitment to preserving investments in the areas highlighted below.

- Education
  - K-12 Education
    - Fully funds cost-of-living adjustment and the Universal School Meals program.
  - Higher Education
    - Maintains commitments to the University of California and California State University systems.
- Housing and Homelessness
  - Flexible aid to local governments, commitments to Homekey, Project Roomkey, and the Behavioral Health Continuum Infrastructure Program.
- Health Care and Mental Health
  - Community Assistance, Recovery, and Empowerment (CARE) Act funding as follows: \$67.3 million in 2023-24, \$121.0 million in 2024-25, and \$151.5 million in 2025-26 and annually thereafter for county behavioral health department costs.
  - Funding for CalAIM, access to health care regardless of immigration status, reproductive health care, and a behavioral health bond to modernize the Mental Health Services Act.
- Climate
  - \$48.0 billion for clean transportation, zero-emission vehicles; wildfire and forest resilience; and a climate resilience bond.
- Water Resiliency
  - \$8.5 billion for drinking water, flood, and water supply reliability; habitat and watersheds; drought support; and conservation/agriculture.

- \$492.0 million for flood protection, \$290.0 million of which is newly proposed since the January 2023 budget release to support flood contingency, flood control subventions, and San Joaquin floodplain investments.
- Public Safety
  - Over \$800.0 million for public safety plans, victims' services, officer wellness and training, and funding to combat fentanyl.
- Economic Development and Workforce/Job Development
  - Continued funding for small business relief grants and workforce development.

## Budget Highlights

### Airpark 599

In 2022-2023, Airpark 599 development progress included construction of project roadway, detention basin, and offsite improvements, including phased widening and street frontage improvements at Arch-Airport Road, connections to City of Stockton sanitary sewer and water utilities, and construction of a new traffic signal. In March 2023, construction was completed on the first industrial building (Building 4) consisting of 1.2 million square feet on approximately 58 acres. The County's development partner, Catellus, is actively marketing the building. A second, larger building is under construction (Building 1) consisting of a 1.4 million square foot logistics facility on approximately 112 acres. Target Corporation has entered into a lease for the building, planned for occupancy in the third quarter of 2023-2024. Approximately 2,500 employees will staff the new facility, with seasonal variations. In 2023-2024, County staff will collaborate with Catellus to ensure the successful buildout of the project.

### Health Services

**Public Health Services (PHS)** – Public Health Services is using its \$4.0 million Future of Public Health funding award accepted by the Board in November 2022 to transition at least 20 positions previously funded under various COVID-19-related grants to permanent public health positions. The Adopted Budget also includes the deletion of 20 vacant grant-funded positions in order to manage available funding on existing grant programs.

**Emergency Medical Services (EMS)** – The 2023-2024 budget includes an increase in staffing of two full-time positions in order to establish a local paramedic training program, run through EMS, for the first time in decades. EMS plans on a spring 2024 course to expand access to paramedic training to help mitigate staffing shortages being experienced by all EMS providers. The Adopted Budget also includes \$200,000 in one-time funding to initiate the process to revise the EMS transportation plan through procurement of an EMS consulting service.

**Whole Person Care (WPC) Program** – WPC started as a pilot program under California's Section 1115 Federal Medicaid Waiver approved in December 2015. WPC coordinates the physical health, behavioral health, and social service needs for homeless individuals with a complex physical or behavioral health need who are unable to self-manage, who are transitioning from incarceration, or who meet Behavioral Health Services eligibility for persistent mental illness or substance use disorder. As part of the January 1, 2022 transition to California Advancing and Innovating Medi-Cal (CalAIM), WPC began shifting to County staff for outreach instead of contracting for services. To this end, seven positions were approved by the Board in November 2021. The 2022-2023 budget included an additional six positions. The 2023-2024 Adopted Budget includes eight positions, bringing full-time staffing to 21.

**Behavioral Health Services (BHS)** – BHS continues to partner with Human Resources to combat the high vacancy rate for mental health provider positions. During 2022-2023, this included wage increases for key clinical classification positions, addition of many BHS positions to the difficult to recruit classification list which permits various recruitment and retention bonuses, and the implementation of the Mental Health Workforce Pipeline Project, allocating \$5.2 million from American Rescue Plan Act (ARPA) funding to offer incentives and benefits to students and current employees pursuing mental health degrees. BHS is also leveraging Mental Health Services Act funding



to provide recruitment, retention, and educational stipends to eligible BHS staff. The 2023-2024 Adopted Budget includes a net addition of 47 full-time positions to expand services.

BHS received a State award of \$9.0 million for the renovation of a County-owned building to serve as an additional 16-bed inpatient psychiatric health facility and is currently working on an expenditure plan. In partnership with other Health Care Services agencies, BHS is also preparing a spending plan recommendation for the Opioid Settlement Fund Special Account balance of \$4.1 million (as of March 31, 2023). Funds will be used for opioid remediation efforts.

**San Joaquin General Hospital (SJGH)** – The 2023-2024 Adopted Budget includes \$3.0 million for 12 months’ cost of a Management Services Agreement with Dignity Health, approved by the Board on May 3, 2022. The initial 18-month term became effective July 1, 2022, and runs through December 31, 2023, with an option to extend if agreed upon by the County and Dignity Health.

MSA initiatives that have begun include revenue cycle improvements, Leapfrog Purchasing Program score improvement, Group Purchasing Organization affiliation, and electronic time clocks. Other goals in 2023-2024 for SJGH include a reduction in nursing turnover and reducing the pandemic-related increase in contract nursing.

**First 5 San Joaquin (First 5)** – The Board has allocated \$6.6 million in ARPA funds to First 5 San Joaquin. These funds will serve children ages 0 to 5 and their adult caretakers. ARPA funds will also address the long-term harmful effects of the COVID-19 pandemic. The 2023-2024 Adopted Budget includes appropriations of ARPA funds to support First 5’s oral health initiative, home visitation, and family and developmental services.

## **Housing and Homelessness**

Since 2017, the Board of Supervisors has remained committed to Housing First, an approach to the provision of supportive housing for people experiencing homelessness developed by the U.S. Interagency Council on Homelessness under the George W. Bush Administration. Although housing is the immediate solution to homelessness, it is not the long-term solution. The County must also help people address concerns related to their physical and mental health, employment, legal, and other issues that caused them to fall into homelessness. Housing First acknowledges that without basic necessities like food and a place to live, services intended to address the root causes of homelessness are ineffective and waste limited resources.

Essential funding from the State and Federal government to pay for supportive services, shelters, and affordable housing require recipients like the County to follow Housing First. By supporting Housing First, the County has been well positioned to take advantage of opportunities to bring these tax dollars back to the community and make an impact on reducing homelessness.

- Over the last two years, the County has implemented nearly \$100.0 million in State and Federal funding for housing and homelessness, with over half from COVID relief programs such as the CARES Act, Homekey, and ARPA.
- Using these resources, the County has directly supported the development of 268 new units of affordable housing for homeless veterans, homeless families, low-income seniors, and people struggling with serious mental illness through diverse projects such as Victory Gardens, Crossway Residences, and Town Center Studios, with plans for even more units in the years to come.

The County also uses local funding to support housing and homelessness projects through the services it provides every day for indigent households, via departments like Human Services Agency, Neighborhood Preservation, Behavioral Health Services, and Public Health Services. The County will continue to seek opportunities to expand affordable housing capacity and supportive services by leveraging its partnerships and resources to maximum benefit for the communities it serves. The County’s central role as administrator of the San Joaquin Continuum of Care has been a critical component of its success, dramatically enhancing its ability to convene and bring together stakeholders from throughout the region to increase support for these critical solutions to homelessness.

Resolving homelessness for any community is highly complex, and there is no single solution. The County has spent the last five years supporting the development of a comprehensive system of housing and services to meet the needs of everyone experiencing homelessness. At the center of that system is emergency shelter. Moving people quickly from the streets and into stable living situations requires sufficient capacity in both emergency shelter and affordable housing.

- The County has supported the addition of 930 new shelter beds in Stockton, Lodi, Manteca, Tracy, and the unincorporated areas by taking full advantage of unprecedented funding support from the State and Federal government.
- This includes \$7,248,482 in funding from the California Homeless Housing, Assistance, and Prevention Program, and \$31,492,467 from funds provided to the County through ARPA.

This support has made possible a 128% increase in shelter capacity over previous levels, by far the biggest expansion in San Joaquin County's history.

In addition to helping bring online more traditional shelters such as the Lodi Access Center, the Navigation Center expansion at Stockton Shelter for the Homeless, and the Arbor Avenue Shelter in Tracy, the County has enabled shelter solutions designed from the ground up for people who are experiencing not just chronic homelessness, but also serious mental illness and substance abuse issues. This includes the Community Medical Center Respite Center and a shelter in French Camp developed and operated by Behavioral Health Services. These new and innovative facilities serve a critical role in the County's shelter system by combining robust treatment and emergency shelter to provide an option for people experiencing homelessness who are in deep crisis, and an option for first responders to bring the highest-needs people experiencing unsheltered homelessness off the streets in the communities they serve.

## Human Services

**CalWORKs Assistance** – The CalWORKs program is the largest cash assistance program for families. It provides financial help to support the needs of families, such as shelter, food, and clothing. CalWORKs clients received a 22% benefit increase in 2022-2023. As a result, the 2023-2024 Adopted Budget includes an appropriations increase of \$20.2 million. This program receives 97.5% of its funding from State and Federal sources.

**Mary Graham Children's Shelter (MGCS)** – The Human Services Agency (HSA) received a Plan of Correction (POC) from the California Department of Social Services Community Care Licensing Division (CCLD) on November 3, 2022. The POC required MGCS to hire additional staff to improve the supervision of youth in its care. The Board approved 13 new positions on January 10, 2023 (R-23-4): 1 Shelter Supervisor I and 12 Shelter Counselor I-II positions. The POC is a two-year compliance plan, and HSA leadership continues to engage with CCLD to meet or exceed its requirements.

**Aging & Community Services (ACS)** – The 2023-2024 Adopted Budget includes six new positions to administer new and expanded funding in the Home Energy Assistance Programs and grants for older adults. These programs assist low-income households by installing energy-saving measures and completing repairs to improve energy efficiency. Qualifying households may also receive financial assistance to pay utility bills such as gas, electricity, wood, propane, oil, and water.

**Veterans Services Office (VSO)** – The effort to improve services and fill vacancies at the VSO was bolstered during 2022-2023 by increases in pay and revisions to the Veterans Service Representative I classification, allowing a new pathway for applicants with lived experience. In December 2022, two full-time positions were added to the VSO; the 2023-2024 Adopted Budget includes an additional three full-time positions, for a new total of 10 full-time positions, up from four in July 2021.

The Adopted Budget also includes funding to continue leasing office space for the VSO, which moved in February 2023 to central Stockton. The VSO continues to work with the General Services Department and Community Development Department on plans for the construction of a new VSO site in French Camp.

## Law and Justice

Collectively, the Adopted Budget for Law and Justice totals \$492.0 million, which is an increase of \$51.4 million from the 2022-2023 adjusted budget. Overall, the budget includes a net decrease of 11 positions for all Law and Justice budgets: 10 positions were deleted in the Probation Department budget, 9 positions were deleted in the Child Support Services budget, 4 positions were deleted in the District Attorney's budget consisting of 12 additions and 16 deletions, 8 positions were added in the Sheriff's budget, 3 positions were added in Correctional Health Services budget, and 1 position was added to the Public Defender's budget.

**Public Defender** – The Public Defender provides constitutionally-mandated indigent defense services in all criminal matters. The Adopted Budget funds initiatives to increase the Department's efficiency and improve service levels. Among these is the implementation of Defender by Karpel (DbK), a digital system able to receive discovery from the District Attorney electronically. DbK will increase efficiency and support the Department's SMART (Specific, Measurable, Attainable, Realistic, and Timely) Goal of becoming a paperless office.

Social Workers play an essential role in client defense. They are often responsible for evaluating client needs and referring them to services to support their success in the community. In doing so, Social Workers support client well-being and can help reduce recidivism. The Adopted Budget adds two new Social Worker positions to the Department: one Social Worker Supervisor and one Senior Social Worker. These positions will replace a vacant Social Worker III position, resulting in a net increase of one Social Worker.

**District Attorney's Bureau of Investigation** – Due to the rise in fentanyl cases, copper wire thefts, and stolen farm equipment and produce, the Bureau of Investigation is expanding investigative efforts and adding one District Attorney Investigator that will be dedicated to the County's Agriculture, Gang, Narcotics, and Enforcement Team (AGNET). The investigator will specialize in crimes related to agriculture, gangs, narcotics, and rural property.

**Data Analytics Software** – The District Attorney (DA)'s Office will implement of the Sicuro Data Analytics system designed to act in accordance with California's Racial Justice Act. The Sicuro software will assist the DA's Office with compliance of the Justice Data Accountability and Transparency Act. Implementation will occur in three phases over the next two years.

**Family Justice Center (FJC)** – Expansion of services and partnerships will continue to be an area of focus for the FJC. The FJC has brought back the Domestic Violence Task Force, which is made up of several partnering agencies which focus on the sharing of best practices for response and intervention to domestic violence. New partnerships with El Concilio and Chest of Hope will connect victims with free mental health services, transitional housing, and emergency shelter. An Office Technician Coordinator has also been approved to assist with the expansion of providing services at the FJC.

**DJJ Realignment** – On September 30, 2020, the Governor signed Senate Bill (SB) 823, which realigns youth traditionally committed to the California Department of Corrections and Rehabilitation, Division of Juvenile Justice (DJJ), to local probation departments. This legislative reform closed intake at DJJ on July 1, 2021, with some exceptions to continue to allow youth eligible for transfer hearings to be placed in DJJ. The Governor's current budget directs DJJ to have a final closure date of June 30, 2023.

Funding establishes the Juvenile Justice Realignment Block Grant program with Statewide funding set for 2022-2023 through 2024-2025 at \$121.4 million, \$199.2 million, and \$211.9 million, respectively. The DJJ realignment allocation to the County was \$3,477,211 in 2022-2023; \$5,785,151 in 2023-2024; and is expected to be \$6,160,840 in 2024-2025. County distributions are updated annually based on updated total eligible DJJ population and County age population of 10 to 17 years old.

In 2023-2024, the Probation Department anticipates utilizing \$3,097,530 of the \$5,785,151 allocation and placing the remaining portion of \$2,687,621 in the Juvenile Justice Realignment Block Grant General Fund Special Account (#12110).

**California Multi-Jurisdictional Methamphetamine Enforcement Team (Cal-MMET)** – Prior to 2023-2024, the Cal-MMET budget unit (#2021609000) was part of the Operational Grants budget. Beginning in 2023-2024, the Cal-MMET budget is a new standalone budget unit, and 10 positions will be transferred from Sheriff Detectives and Sheriff Patrol as a part of the reorganization. The Division will now consist of one Captain, one Lieutenant, one Sergeant, seven Deputy Sheriffs, one Office Assistant Specialist, and one Senior Office Assistant. The Department will track program expenditures to be offset with General Fund and non-General Fund sources.

**CAD/RMS Upgrade** – In 2023-2024, the Sheriff's Office will upgrade the Computer Aided Dispatch (CAD) and Records Management System (RMS) to integrate with the Department's evidence system and provide compatibility with body worn camera, taser, and drone equipment. The total estimated cost of the upgraded system is \$3,712,600 over five years. There is a one-time cost of \$444,300 for the CAD/RMS upgraded system and an ongoing annual maintenance cost of \$653,660. However, in 2020-2021, the Information Systems Division budget was augmented by \$625,504 for a CAD system upgrade. The project did not move forward at the time. As a result, funding is requested in the amount of \$472,456, which includes \$444,300 in one-time costs for the new system and an additional \$28,156 each year for five years for the annual maintenance costs.

**Correctional Health Services (CHS)** – The 2023-2024 Adopted Budget includes \$1,783,491 for year one of the Electronic Health Record system replacement project. This cost includes the addition of one full-time position, IT support from Health Care Services Administration, equipment, software, and associated supplies. The system is expected to result in increased efficiency and better patient outcomes.

**Child Support Funding** – For 2023-2024, the Governor's proposed budget includes an additional \$35.8 million (\$12.2 million State General Fund and \$23.6 million Federal match) for underfunded Local Child Support Agencies (LCSAs) administrative costs. The State Department of Child Support Services (State DCSS) has determined the County would receive \$1.96 million of the supplemental funding based on its allocation methodology. The Department's 2023-2024 Adopted Budget includes the \$1.96 million in additional funding. While the Department is receiving additional Federal and State Child Support funding, with negotiated salary and benefits adjustments in 2023-2024 totaling \$2.3 million, the Adopted Budget includes the deletion of nine vacant Senior Office Assistant positions to offset the increase.

## **Public Improvement**

The 2023-2024 Public Improvement program totals \$137.8 million and is primarily funded by Tobacco Settlement allocations for capital improvement projects, transfers from departments with specific projects, County Facilities Fees, and Capital Outlay Fund balance.

### ***Encumbrances Carried Forward to 2023-2024***

Funding for in-progress complex multiyear projects that will be re-budgeted includes \$1.0 million to partially fund the completion of the Behavioral Health Services Adult Residential Treatment Modular Campus in French Camp; \$19.2 million for Emergency Homeless Shelter projects in Lodi, Manteca, Tracy, and Stockton; and \$1.5 million of American Rescue Plan Act funding for various Parks projects.

### ***Five-Year Capital Improvement Plan***

In 2021-2022, staff developed a five-year Capital Improvement Program (CIP) that includes a prioritized listing of capital projects for the next five fiscal years. In June 2023, staff updated the CIP to report accomplishments and to add fiscal year 2027-2028 projects. Development of the CIP included an analysis of funding availability and expense forecasting for each project, recommended project sequencing, and an estimated timeline for project completion.

### ***New Construction – Planned and Funded Capital Improvements for 2023-2024***

- **Several Projects Will Enter the Construction Phase During 2023-2024 (\$56.9 million)** – \$19.6 million is appropriated for the 6 S. El Dorado Street Tenant Improvements project that includes renovation and tenant

improvements of the property acquired by the County in December 2021 to provide a replacement facility for the District Attorney's Office. In addition, \$27.5 million is appropriated for three pre-fabricated metal buildings on the Sheriff's Campus for a classroom facility, training facility, and evidence facility. Additionally, \$9.8 million is appropriated for the fabrication and installation of a warehouse and office replacement facility for Emergency Medical Services on the hospital campus.

- **County Detention and Program Facility – SB 1022 (\$37.0 million)** – The long-awaited SB 1022 Project includes the construction of a new single-story building that will be comprised of four medium-security housing units with 256 dormitory-style inmate beds, a 12-bed mental health unit, office space for staff, parking, and site improvements. The mental health unit will also include a dayroom, interview room, and an outdoor recreation yard. The Project's program and treatment spaces will replace the existing Honor Farm barracks-style inmate housing located in French Camp. The site layout and building are designed to be operationally and energy efficient, cost effective, durable, and low maintenance while still maintaining safety and security. The total estimated Project cost is \$49.5 million and SB 1022 funding in the amount of \$36.5 million will be used primarily for construction costs. The 2023-2024 Public Improvement budget includes approximately \$37.0 million for initiation of construction following requisite approvals from the State.
- **Morgue/Medical Examiner Facility Replacement (\$18.2 million)** – The County Morgue/Medical Examiner Facility Replacement Project consists of the design and construction of a replacement of the current Morgue Facility at the Sheriff's Office Complex in French Camp. The Project is a proposed single-story building of approximately 18,000 square feet. The design concept will seek to provide a controlled environment with a focus on security, sufficient spacing for modern forensic equipment, and adequate space for staff to complete tasks efficiently. Public spaces will be well defined and situated to meet needs for access, information, privacy, and expression of grief. The design will encourage interaction among staff while assuring confidentiality when required, emphasize the dignified handling of the decedent's remains and property while accommodating the needs of forensic investigation and chain of evidence, and provide an efficient facility with the flexibility to accommodate change and future expansion. The 2023-2024 Public Improvement budget includes appropriations of \$18.2 million for the initiation of construction activities.

## Roads and Facilities

**Public Works** – The Department will increase its efforts in streamlining document/information sharing through its online project management software that allows for collaboration on projects and processes. The Surveyor's Division will continue to convert paper documents to a digital format and store them in the document management system. In addition to this effort, Public Works will be furthering its pilot project of launching a work order/asset management system.

Public Works is providing leadership training to its 21 division leaders. The training is designed to maximize team productivity, individual fulfillment at work, and help Public Works leaders in being more effective in managing their teams.

Public Works will continue its participation as a member of the Illegal Dumping Task Force and assist with eradication efforts. In 2023-2024, Public Works is allocated \$200,000 from the ARPA fund to support the cleanup of water ways and other areas within the County.

**Organics Facility and New Economic Model for Solid Waste** – SB 1383 requires the County to take substantial measures to lower greenhouse gas emissions through a variety of efforts including the diversion of organic materials from County landfills by 75% (from 2014 levels). Over the next 10 years, it is projected that the volume of organic waste diverted from landfills will increase steadily and dramatically. Accommodating this increase will require new infrastructure and processing methods. Other County departments are affected by this legislation and have deliverables as well, ranging from the purchase of recycled-content products and the procurement of post-processed organic products to edible food programs to benefit the community. A needs assessment is currently being conducted to reveal how this legislation will impact solid waste operations. A new fund and additional revenue sources will be established

due to projected loss in gate fee revenues from decreased volumes and to offset costs incurred under this mandate. Additional staffing has been added to ensure that all new requirements are satisfied.

## Take-Home Vehicles (THVs)

In August 2020, an internal audit of THVs was released by the Auditor-Controller's Office. The audit recommended that the County Administrator's Office (CAO) establish a THV master list and forward to Fleet Services Division.

The CAO agreed with the recommendation and added a signature line on the THV form to sign off when approved by the CAO during the budget process. Beginning in 2022-2023, and subsequently during each year's annual budget process, a master list of all THVs is established by the CAO and forwarded to the Fleet Services Division of Public Works. In addition, to provide greater transparency, a summary list of the THVs assigned to various departments is included in the 2023-2024 Adopted Budget document.

Department	Vehicle Description	Quantity
<b>District Attorney</b>		
<i>District Attorney</i>	Intermediate Sedan	15
<i>District Attorney</i>	Pickup	1
<i>District Attorney</i>	Utility Vehicle	12
<b>Environmental Health</b>		
<i>Environmental Health</i>	Pickup	1
<i>Environmental Health</i>	Utility Vehicle	1
<b>Public Works</b>		
<i>Public Works</i>	Compact Sedan	1
<i>Public Works</i>	Compact Sedan - Electric	4
<i>Public Works</i>	Pickup	13
<i>Public Works</i>	Utility Vehicle	4
<b>Sheriff</b>		
<i>Sheriff</i>	Intermediate Sedan	37
<i>Sheriff</i>	Pickup	26
<i>Sheriff</i>	Utility Vehicle	42
<i>Sheriff</i>	Van	3
<b>Total Take-Home Vehicles</b>		<b>160</b>

## Tourism Recovery

In March 2023, the County entered into agreements with partners City of Tracy, Downtown Stockton Alliance, Lodi Winegrape Commission, Rampant Creative, Visit Lodi Conference & Visitors Bureau, and Visit Stockton to augment promotional efforts to increase awareness and drive visitation to Countywide activities, businesses, destinations, and events through various strategies, including web-based marketing, social media, radio, television, and print advertisements. The goal is to continue to help consumers rediscover the County as a compliment to broader economic recovery efforts and to encourage residents and visitors to support local businesses and promote the County as a year-round destination. Program activities will continue in 2023-2024 and the Economic Promotion budget includes \$280,000 for completion of these efforts by December 2023.

## Vacant Positions

As of April 30, 2023, the County had 7,137 allocated full-time positions, of which 1,178 or 16.5%, were vacant. This compares to 15.9% from the same period last year. Of the 1,178 vacancies, 729 are actively under recruitment.



Approximately 82.2% of the vacancies (as of April 30, 2023) are in the following County departments (included is the vacancy percentage of the departments):

Department	Vacancy	Vacancy %
➤ Probation	105	28.8%
➤ Public Health Services	82	28.8%
➤ Behavioral Health Services	174	23.6%
➤ District Attorney	55	18.3%
➤ San Joaquin General Hospital	211	15.3%
➤ Public Works	52	14.1%
➤ Sheriff	117	13.5%
➤ Human Services Agency	172	12.8%

With the exception of Probation, District Attorney, and Sheriff, the departments listed above are primarily funded by State and Federal revenue or service charges.

## Reserves & Contingencies

The General Reserve is a cash resource for financing during the dry period between the beginning of the fiscal year and the receipt of property taxes in December and April. Additionally, it acts as a contingency for the County in extreme emergencies. For 2023-2024, the General Reserve is maintained at the current level of \$10.0 million.

The Reserve for Contingencies covers day-to-day unforeseen budgetary needs and has been used by the Board of Supervisors sparingly in the past. In conformation with the Board's reserve policy (R-10-525), including a goal of setting the Reserve at 5.0% of the County budget, the Reserve for Contingencies is set at \$129.6 million in 2023-2024, which represents approximately 5.0% of the Adopted Budget. The balance in the Reserve as of March 31, 2023 was \$111.9 million, so a transfer of \$17.7 million is included in the Adopted Budget.

In 2015-2016, an Unfunded Pension Reserve was established to begin addressing the County's unfunded retirement contribution liabilities (B-15-135). The most recent audited financial statements prepared by the San Joaquin County Employees' Retirement Association identified an Unfunded Actuarial Liability totaling \$1.5 billion and San Joaquin County's share is approximately \$1.4 billion. The balance in the Reserve as of March 31, 2023 was \$53.0 million and the Adopted Budget adds \$16.6 million to the Reserve. The Adopted Budget also includes funding for the full 5.0% contribution toward the unfunded retirement liability, estimated at \$30.5 million.

In 2015-2016, a reserve for Economic Development was established to support the County's promotional/marketing efforts and economic development activities/programs, including incentives for businesses to relocate and/or expand in San Joaquin County. The balance in the Reserve as of March 31, 2023 was \$3.0 million, and the Adopted Budget directs \$135,000 of the Transient Occupancy Tax (Hotel/Motel Tax or TOT) to this Reserve. This represents the amount of the projected TOT that has not been programmed in the Adopted Budget for economic development-related activities and programs.

In 2019-2020, an Approved Labor Agreements Reserve was established to ensure that the County can keep its commitment to fund approved labor agreements. An initial \$5.0 million was transferred from the General Fund in 2019-2020, and an additional \$11.3 million was included in the 2020-2021 Adopted Budget. Total estimated labor costs are nearly \$80.0 million for 2024-2025 and 2025-2026, when most labor agreements expire. The Adopted Budget includes an additional contribution of \$40.0 million to the Reserve.

The County Systems Automation Reserve is used by the Information Systems Division to fund projects and improvements to information systems. The Adopted Budget transfers \$40.0 million to this Reserve for future costs related to the implementation and support of the Enterprise Resource Planning system, which is expected to cost in excess of \$100.0 million over 15 years.

## Supplemental Requests

Initial requests for supplemental funding from County departments and non-County organizations totaled \$23.8 million. Department heads initially submitted requests for supplemental funding totaling \$18.4 million. Subsequent to the County Administrator/Department Head Budget Meetings, department heads withdrew a total of \$0.7 million of their initial requests. As a result, the departmental supplemental funding requests were reduced to \$17.7 million, all of which is funded in the Adopted Budget. Additionally, 42 non-County organizations (NCOs) submitted requests for County funding totaling \$5.3 million. Based on the guidance provided to the applicants, the Adopted Budget includes \$2.6 million for these organizations, leaving an unfunded balance of \$2.7 million. Supplemental requests, both funded and unfunded, are outlined in Attachment A and detailed in individual budget narratives.

## Final Budget Hearing

On June 20, 2023, the County Administrator's Office and County department heads presented the 2023-2024 Proposed Budget to the Board of Supervisors at the Final Budget Hearing. During the Hearing, the Board approved two changes in appropriations that are reflected in the Adopted Budget. The changes are as follows: the allocation of up to \$1.6 million in matching funds for Pioneer Village funded by a transfer from the Contingency Provision budget, and the addition of two positions and deletion of one position in the Assessor-Recorder-County Clerk's budget in the amount of \$183,288 funded by a transfer from the Contingency Provision budget. The Contingency Provision budget began with a \$5.0 million balance, but was reduced to \$3.2 million to reflect the transfers approved by the Board during the Hearing. This resulted in no change in the total County budget.

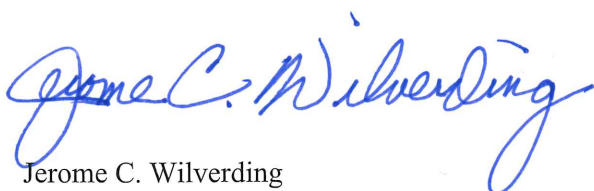
The impact of final State and Federal Budget actions are unknown at this time and creates a significant risk to the adopted spending plan. It may be necessary to return to the Board to re-open budget considerations after the 2023-2024 Final Budget is adopted, should additional funding become available or should major funding/program reductions be imposed based upon the adopted State and Federal Budgets.

## Appreciation

The CAO appreciates department heads' leadership, initiative, and innovation during this past fiscal year as the County continues to engage in new initiatives, projects, and challenges. It has certainly been encouraging to have the pandemic predominately behind us for the first time in years. The cooperative budget meetings with department heads and their budget teams have been instrumental in developing a collaborative budget which promotes the goals of the County and again delivers a structurally-balanced budget. Our Human Resources and Information Systems Divisions were crucial in providing analysis, insight, and support in the preparation of this document.

The County Administrator's staff have been indispensable in their ability to get the job done. For the first time in three years, the CAO team has been fully staffed, which is important during this critical process. The CAO team should be commended for their hard work, willingness to collaborate on assignments, thoroughness, and long hours which contributed to the preparation of this document. This is especially notable as the SMART goals mentioned earlier in this message were incorporated into this budget document for the very first time. The team's accuracy, comprehensive evaluation of budget material, and willingness to continuously raise the bar are greatly appreciated. Also appreciated is the energetic attitude which was evident throughout this process.

Very truly yours,



Jerome C. Wilverding  
County Administrator

## Attachment A

### Supplemental Budget Requests

Department	Amount Requested	Amount Funded	Supplemental Items	Page No.
➤ <b>Assessor</b>	\$182,125	\$182,125	Add a Business Intelligence Administrator for business development tasks.	A-32
	114,352	114,352	Add a Geographic Information Systems Specialist I-II, to provide increased support for existing GIS software.	A-32
	33,818	33,818	Add an Associate Geographic Information Systems Analyst, partially offset by deleting a Mapping Technician I-II position.	A-32
Total Assessor	\$330,295	\$330,295		
➤ <b>Recorder-County Clerk</b>	\$149,470	\$149,470	Add a Department Information Systems Analyst I-II to assist with innovation projects.	A-32
Total Recorder-County Clerk	\$149,470	\$149,470		
➤ <b>County Administrator</b>	\$85,047	\$85,047	Add a Senior Office Assistant, and associated equipment costs, to support increased workload in the office.	A-12
Total County Administrator	\$85,047	\$85,047		
➤ <b>District Attorney (DA)</b>	\$725,000	\$725,000	Purchase and implement new Sicuro criminal justice data analytics software to assist with data transparency.	D-15
	494,876	494,876	Add a Department Information Systems Specialist III, Department Information Systems Analyst III, and a Department Information Systems Manager to support new data analytics software and enhance current law enforcement services.	D-15
	229,370	229,370	Add a District Attorney Investigator I-II, and associated equipment and vehicle costs dedicated to the AGNET unit.	D-15
	114,911	114,911	Add a Victim Witness Advocate III, and associated equipment for the Victim Witness program.	D-15
	106,908	106,908	Add an Administrative Assistant I to address increased workload.	D-15
	95,501	95,501	Add a District Attorney Investigative Assistant I-II to support digital and electronic information harvesting.	D-15
	91,043	91,043	Add an Accounting Technician I, and associated equipment to support the fiscal unit.	D-15
	84,674	84,674	Add an Office Technician Coordinator to support the Family Justice Center.	D-15
Total District Attorney	\$1,942,283	\$1,942,283		

## Attachment A

### Supplemental Budget Requests

Department	Amount Requested	Amount Funded	Supplemental Items	Page No.
➤ <b>Environmental Health</b>	\$150,559	\$150,559	Funding for Small Public Water System Program due to loss of revenue from State grant.	F-64
Total Environmental Health	\$150,559	\$150,559		
➤ <b>General Services – Facilities Management</b>	\$162,300	\$162,300	Funding for armed guard security services in the County Administration building.	B-11
	300,000	300,000	Funding for maintenance and repairs of the Old Courthouse building located at 222 East Weber Avenue.	B-11
	86,699	86,699	Add an Office Supervisor, and associated equipment to provide additional administrative support.	B-11
<i>Parks and Recreation</i>	109,632	109,632	Funding to reimburse the cost of a dedicated Crafts Worker III position in Facilities Management.	I-8
	84,483	84,483	Add an Animal Care Specialist.	I-7
	50,000	50,000	Funding for arborist services.	I-8
Total General Services	\$793,114	\$793,114		
➤ <b>Health Care Services Agency – Emergency Medical Services (EMS)</b>	\$272,130	\$272,130	Add EMS Analyst and Pre-Hospital Care Coordinator to stand up local paramedic training program.	F-37
	200,000	200,000	Funding for EMS ambulance system design assessment.	F-37
	82,269	82,269	Add a vehicle and associated operating expense.	F-37
<i>Veterans Services Office (VSO)</i>	216,051	216,051	Funding for Veterans Service Representative III, Mental Health Specialist II, and Office Technician Coordinator to expand VSO services, partially offset by a decrease in extra-help costs in the amount of \$67,498.	G-46
	87,908	87,908	Funding for EEDD office lease.	G-46
Total Health Care Services Agency	\$858,358	\$858,358		
➤ <b>Human Resources</b>	\$61,896	\$61,896	Add an Employee Relations Analyst, partially offset by deleting a vacant Senior Office Assistant position.	A-52
Total Human Resources	\$61,896	\$61,896		

## Attachment A

### Supplemental Budget Requests

Department	Amount Requested	Amount Funded	Supplemental Items	Page No.
➤ <b>Information Systems Division</b>	\$4,090,000	\$4,090,000	Transfer funding to the Automation Reserve Fund.	A-76
	850,000	850,000	Funding for disaster recovery infrastructure upgrade.	A-76
	800,000	800,000	Funding for PeopleSoft human capital management upgrade.	A-76
	750,000	750,000	Funding for Adult Probation system replacement.	A-76
<i>Central Telephone</i>	675,000	675,000	Funding for network switch replacement.	A-81
<i>Central Telephone</i>	285,000	285,000	Funding for firewall refresh.	A-81
Total Information Systems Division	<u>\$7,450,000</u>	<u>\$7,450,000</u>		
➤ <b>Office of Emergency Services</b>	\$22,717	\$22,717	Funding for OES Duty Officer standby pay.	C-25
	50,000	50,000	Funding for emergency planning mapping software.	C-25
	39,750	39,750	Funding for Geographic Information Systems Specialist position reimbursement.	C-25
Total Office of Emergency Services	<u>\$112,467</u>	<u>\$112,467</u>		
➤ <b>Public Defender</b>	\$450,500	\$450,500	Funding for purchase, development, and implementation of Defender by Karpel to receive discovery information electronically.	D-52
	104,368	104,368	Add a Senior Social Worker to handle mental health investigations.	D-52
	27,299	27,299	Funding to increase part-time extra help hours to support attorneys.	D-52
	25,000	25,000	Funding for training opportunities to develop staff.	D-52
	5,669	5,669	Add a Social Worker Supervisor, partially offset by deleting Social Worker III, to supervise other social workers.	D-52
Total Public Defender	<u>\$612,836</u>	<u>\$612,836</u>		
➤ <b>Registrar of Voters</b>	\$159,246	\$159,246	Add an Elections Manager.	A-70
	108,048	108,048	Add an Administrative Assistant I.	A-71
	106,419	106,419	Add a Geographic Information Systems Specialist I.	A-71
	16,235	16,235	Add four Elections Technicians. Total cost of four positions is \$316,235, partially offset by \$300,000 in decreased extra help and consulting costs.	A-71
Total Registrar of Voters	<u>\$389,948</u>	<u>\$389,948</u>		

## Attachment A

### Supplemental Budget Requests

Department	Amount Requested	Amount Funded	Supplemental Items	Page No.
➤ Sheriff – Cal-MMET	\$38,186	\$38,186	Purchase a fuel trailer to be stored at the Stockton Metropolitan Airport.	D-67
	25,865	25,865	Funding for a new pilot training course.	D-67
Special Services Division	324,000	324,000	Purchase 4 additional vehicles assigned to the Special Services Division.	D-71
Patrol	156,200	156,200	Purchase truck and trailer for Mounted Patrol Unit.	D-79
	70,000	70,000	Funding of ongoing maintenance costs for 28 license plate reader cameras.	D-79
Detectives	1,135,490	1,135,490	Add five Deputy Sheriffs I-II, and associated equipment for technology crimes, human trafficking, and homicide/robberies.	D-85
	275,112	275,112	Add a Sergeant, and associated equipment for the Technical Services Unit.	D-85
	50,600	50,600	Funding for GrayKey subscription.	D-85
	40,621	40,621	Funding for interview rooms and office renovations.	D-85
	26,350	26,350	Funding for the purchase of a pole camera.	D-85
	15,000	15,000	Funding for purchase of Berla vehicle data extraction tools.	D-85
Administration-Support Services	500,000	500,000	Funding to build a roof covering for the existing range.	D-95
	287,000	287,000	Funding to replace the Coleman Range targeting system with moving targets.	D-95
	311,220	311,220	Funding to reimburse two new Personnel Analyst II positions in the Human Resources budget.	D-95
	121,515	121,515	Add an Administrative Assistant II to supervise administrative functions of the Sheriff's Office executive team.	D-95
	110,000	110,000	Purchase two vehicles for Background Investigators.	D-95
	85,933	85,933	Add an Office Technician Coordinator to administer and process department related travel and training requests.	D-95
	65,000	65,000	Funding to create a leadership development course.	D-95
	42,500	42,500	Purchase 1 vehicle for Public Information Specialist positions.	D-96

## Attachment A

### Supplemental Budget Requests

Department	Amount Requested	Amount Funded	Supplemental Items	Page No.
<i>Information Systems</i>	472,456	472,456	Funding is to upgrade the Computer Aided Dispatch (CAD) and Records Management System (RMS) to integrate with the Department's evidence system and provide compatibility with body worn camera, taser, and drone equipment.	D-96
	153,650	153,650	Funding for additional physical hard drive space.	D-96
	139,675	139,675	Funding to purchase 170 licenses for email, PC use, Teams access, and Microsoft Office applications.	D-96
	61,000	61,000	Funding to purchase data licensing for Microsoft Windows Server 2019.	D-96
	9,200	9,200	Funding to expand current Tenable capabilities.	D-96
<i>Custody</i>	177,522	177,522	Funding for 225 tasers.	D-103
Total Sheriff	\$4,694,095	\$4,694,095		
➤ <b>Treasurer-Tax Collector</b>	\$36,661	\$36,661	Add a Department Information Systems Analyst III.	A-25
Total Treasurer-Tax Collector	\$36,661	\$36,661		
➤ <b>UC Coop Extension</b>	\$8,444	\$8,444	Increase in various operational costs.	H-12
Total UC Coop Extension	\$8,444	\$8,444		
<b>Total Departmental Supplemental Requests</b>	<b>\$17,675,473</b>	<b>\$17,675,473</b>		



## Attachment A

### Supplemental Budget Requests

Non-County Organizations (NCOs)	Amount Requested	Amount Funded	Supplemental Items	Page No.
<b>Human Services</b>				
<i>Community Services</i>				
➤ A to Z Psychotherapy	\$88,082	\$0	Program support consisting of salaries and benefits and operational costs for mental health services.	G-20
➤ Amelia Ann Adams Whole Life Center	199,900	79,800	To support videographer services, the purchase of a van, and materials associated with several programs.	G-16
➤ American Seva Foundation	3,060	0	To provide food bags to underserved communities in the Lathrop area.	G-20
➤ Blue Angel of Hope	50,000	0	To provide support to law enforcement communities.	G-20
➤ Bread of Life	120,000	115,700	To support the purchase of a refrigerated sprinter van to expand the organization's services throughout the County.	G-17
➤ Breaking Barriers	200,000	0	To provide education services to youth and adults.	G-20
➤ CeliaWay Foundation, Inc.	174,000	174,000	To support Americans with Disabilities Act upgrades to the Hunter Street House and the purchase of a van to transport program participants.	G-17
➤ Child Abuse Prevention Council	32,000	32,000	To support the purchase and implementation of the organization's case management system.	G-17
➤ Children's Home of Stockton	200,000	200,000	To support the organization's Transition Aftercare program.	G-17
➤ Compassion Residio Services, Inc.	124,645	124,645	To support the setup of a new housing unit, the purchase of a van, and two generators.	G-17
➤ Congregation of Zion	120,000	25,000	To support the setup of a computer lab for an after school program.	G-17
➤ Delta Humane Society	498,160	254,400	To support the purchase and outfitting of a truck and trailer, and supplies for the mobile animal surgical hospital.	G-17
➤ Delta Sculling Center	66,412	66,412	To support the construction and design of office space and the purchase of a four-person sculling boat.	G-17
➤ Electric Auto Association San Joaquin Valley	2,500	0	To support the program materials needed to host an event for electric cars.	G-20

## Attachment A

### Supplemental Budget Requests

Non-County Organizations (NCOs)	Amount Requested	Amount Funded	Supplemental Items	Page No.
➤ Empowering Marginalized Asian Communities	100,000	92,000	To support the development of a media campaign for the hate crime reporting tool and hotline, and program materials.	G-18
➤ Equity Alliance Group, Inc.	200,000	32,000	To support grant writing services, office equipment, and marketing and advertising.	G-18
➤ Escalon Strong	200,000	42,500	To support the purchase of mobility scooters for seniors with limited mobility and materials needed for fix it eviction repairs.	G-18
➤ Five Keys Schools & Programs	99,834	99,834	To support the purchase of program materials, supplies, and equipment.	G-18
➤ Fruitful Cherry	10,850	0	To support program materials, supplies, and workshops.	G-20
➤ God's Church City of Stockton	250,000	0	To support building repairs and upgrades.	G-20
➤ Gospel Center Rescue Mission, Inc.	150,000	90,000	To purchase two generators for the main buildings.	G-18
➤ Grand Foundation (Arts Leadership Alliance)	70,000	70,000	To support community access programs, art education, and outreach.	G-18
➤ Haven of Peace	55,000	55,000	To support the construction of a roadside easement.	G-18
➤ Hoover Tyler Little League	123,183	123,183	To support the replacement costs of field three, its fencing, and bleachers.	G-18
➤ I Care Maternity Home	199,800	0	To set-up of housing for pregnant homeless women.	G-20
➤ Inspire Me, Inc.	12,000	12,000	To support materials for teen wellness camps and workshops.	G-19
➤ Mary Magdalene Community Services	109,232	109,232	To support repairs to the building, upgrades to the conference room, and the purchase of a van and furniture.	G-19
➤ Mims Corner	200,000	0	To support the purchase of a building to store the organization's donations.	G-20
➤ New Genesis Housing Development	20,000	0	To support a mobile vaccine clinic in the Victory Park area.	G-20
➤ Oasis City Center	316,595	316,595	To support the outfitting of a mobile soup kitchen and the expansion of the organization's outreach programs and partnerships.	G-19
➤ Oracles of Truth	59,989	0	To support the administration of Whole Person Care services.	G-20

## Attachment A

### Supplemental Budget Requests

Non-County Organizations (NCOs)	Amount Requested	Amount Funded	Supplemental Items	Page No.
➤ Prevail (Women's Center)	227,000	227,000	To support crisis intervention services, roof repairs, and the replacement of flooring and gates.	G-19
➤ Public Health Advocates	105,994	0	To support program materials, supplies, and space needed for workshops and events.	G-21
➤ Raising Youth Resilience	200,000	0	To support personnel needed to assist in the development of the organization's fundraising project.	G-21
➤ St. Basil's Greek Orthodox Church of Stockton	125,000	125,000	To support one third of the costs to build a shade structure for community events.	G-19
➤ Tracy Chamber of Commerce	25,000	0	To support the roof repairs needed on the building.	G-21
➤ Tracy Earth Project	6,600	0	To purchase and plant 100 trees in the City of Tracy area.	G-21
➤ Uplift All Foundation	137,878	137,878	To support the purchase and outfitting of a new van for laundry and shower services.	G-19
➤ Victory In Praise Church	300,000	0	To support the purchase of a van and fork lift, and upgrades to conference rooms/classrooms.	G-21
➤ Visionary Home Builders	200,000	81,800	To purchase desks, supplies, and materials for art therapy workshops.	G-19
➤ World of Wonders Science Museum	12,400	12,400	To support the purchase of a ball wall exhibit.	G-19
➤ YMCA of San Joaquin	24,948	24,948	To purchase materials and supplies for the after school program.	G-19
<i>Trust Fund Contribution</i>	<i>(110,000)</i>	<i>(100,000)</i>	<i>Funding from Domestic Violence Trust Fund</i>	G-19
<b>Total Supplemental Requests from NCOs</b>	<b>\$5,310,062</b>	<b>\$2,623,327</b>		
<b>Grand Total</b>	<b>\$22,985,535</b>	<b>\$20,298,800</b>	<b>Unfunded Requests = \$2,686,735</b>	



ADOPTED BUDGET

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*Budget Outlook and Statistics*

# Multiyear Budget Outlook 2023-2024 to 2027-2028

GENERAL FUND (\$ in Millions)					
	Adopted	Projected			
	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
<b>FUNDING SOURCES</b>					
<b>General Purpose Revenue (GPR)</b>					
Current Property Taxes	\$330.1	\$330.1	\$336.7	\$343.4	\$350.3
Sales Tax	33.5	34.2	35.2	36.3	37.3
Redevel Pass Through/Homeowner Rel	9.0	9.0	9.1	9.3	9.5
Property Transfer Tax	5.5	5.5	5.6	5.7	5.8
Interest Income	4.0	4.0	4.0	4.0	4.0
Franchise Fees/Fines/Penalties	16.4	16.4	16.5	16.5	16.5
<b>Total General Purpose Revenue</b>	<b>\$398.5</b>	<b>\$399.2</b>	<b>\$407.1</b>	<b>\$415.2</b>	<b>\$423.4</b>
<b>Other Sources</b>					
Departmental Revenues	\$834.1	\$850.8	\$867.8	\$885.2	\$902.9
General Fund Balance	102.5	0.0	0.0	0.0	0.0
General Fund Reserves	0.0	13.7	28.1	38.9	53.5
<b>Total Other Sources</b>	<b>\$936.6</b>	<b>\$864.5</b>	<b>\$895.9</b>	<b>\$924.1</b>	<b>\$956.4</b>
<b>Total Funding Sources</b>	<b>\$1,335.1</b>	<b>\$1,263.7</b>	<b>\$1,303.0</b>	<b>\$1,339.3</b>	<b>\$1,379.8</b>
<b>FUNDING USES</b>					
<b>Labor Costs</b>					
Salary	\$606.3	\$630.6	\$649.5	\$662.5	\$675.8
Retirement	294.3	306.1	315.3	321.6	337.9
- Unfunded Pension Liability Paydown	30.5	31.5	32.5	33.1	33.8
Extra-Help/Contract	62.9	65.4	67.4	68.7	70.1
Overtime/Holiday Pay	25.5	26.7	27.5	28.0	28.6
Health/Dental/Vision	101.2	107.3	113.7	120.5	127.8
Other Benefits	61.8	64.2	66.2	67.5	68.8
<b>Total Labor Cost</b>	<b>\$1,141.0</b>	<b>\$1,231.8</b>	<b>\$1,272.0</b>	<b>\$1,302.0</b>	<b>\$1,342.7</b>
<b>General Fund-Labor Cost (34.5%)</b>	<b>\$393.6</b>	<b>\$425.0</b>	<b>\$438.8</b>	<b>\$449.2</b>	<b>\$463.2</b>
Other Costs	810.6	834.9	859.9	885.7	912.3
Contributions to Labor/Automation Res.	80.0	0.0	0.0	0.0	0.0
Contributions to Capital Outlay Fund	16.6	0.0	0.2	0.2	0.2
Contributions to Unfund. Pension Res.	16.6	0.0	0.0	0.0	0.0
Contributions to Reserve for Conting.	17.7	3.9	4.0	4.1	4.2
<b>Total General Fund Cost</b>	<b>\$1,335.1</b>	<b>\$1,263.7</b>	<b>\$1,302.9</b>	<b>\$1,339.2</b>	<b>\$1,380.0</b>
<b>BUDGET SURPLUS/(DEFICIT)</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>
<b>RESERVES</b>					
Contingencies	\$129.6	\$133.5	\$137.5	\$141.6	\$145.8
General	\$10.0	\$10.0	\$10.0	\$10.0	\$1.8
Labor Agreements Reserve	\$56.4	\$42.7	\$14.6	\$0.0	\$0.0
Unfunded Pension Reserve	\$69.6	\$69.6	\$69.6	\$45.3	\$0.0
Economic Development	\$3.2	\$3.3	\$3.4	\$3.5	\$3.6
Excess Tax Loss	\$34.5	\$34.5	\$35.2	\$35.9	\$36.6

# Multiyear Budget Outlook

## 2023-2024 to 2027-2028

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The Multiyear Budget Outlook is intended to provide the Board of Supervisors a preliminary overview of the County’s finances beyond the budget year. Due to the dynamics of Federal and State budgets and their highly unpredictable impacts on the County, the outlook focuses primarily on the County’s General Purpose Revenue and General Fund, the areas over which the Board has more control. The Multiyear Budget Outlook includes the 2023-2024 Adopted Budget, and revenue and expenditure projections for 2024-2025 through 2027-2028.

Using the assumptions outlined below, structurally-balanced budgets (where ongoing revenues are sufficient to fund ongoing expenses) are anticipated through the forecast period 2023-2024. Projected deficits in fiscal years 2024-2025 and 2027-2028 will require the Board to consider strategies to address the deficits, including reducing costs, increasing revenue sources, or utilizing reserves.

Major Assumptions

### General Purpose Revenue

The following growth assumptions for 2024-2025 through 2027-2028 are made for the General Purpose Revenue forecast:

- **Current Property Taxes** are projected to remain flat for 2024-2025, and then increase by 2.0% for 2025-2026 through 2027-2028.
- **Sales Tax** is projected to increase by 2.0% in 2024-2025, and then 3.0% for 2025-2026 through 2027-2028.
- **Redevelopment Pass Through/Homeowners Relief** consists primarily of Homeowner Exemption and Redevelopment Pass Through. This revenue source is projected to increase at a rate similar to Current Property Taxes.
- **Property Transfer Tax** is projected to be \$5.5 million in 2023-2024 and increase at a rate similar to Current Property Taxes.
- **Interest Income** is projected to be \$4.0 million in 2023-2024, and remain flat for all future years.
- **Franchise Fees/Fines/Penalties** include Utility Franchise Fees, Penalties on Delinquent Property Taxes, and Supplemental Property Tax Assessment Fees and are projected to be \$16.4 million in 2023-2024, and remain relatively flat through 2027-2028.
- **Departmental Revenue** includes funding sources other than General Purpose Revenue, which can include charges for services, aid from governmental agencies, and other income. Departmental Revenue is estimated to grow by 2.0% per year through 2027-2028.
- **One-Time Sources** consist of General Fund balance and General Fund reserves, many of which are listed at the bottom of the table above. Beginning in 2024-2025, the model includes the use of General Fund reserves to fund costs in excess of available revenues, primarily due to recently-negotiated labor increases.
- **General Fund Year-End Balance** is projected at \$180.0 million by June 30, 2023. Utilizing this year-end fund balance, the Adopted Budget transfers \$40.0 million to the County Systems Automation Reserve for future costs related to the Enterprise Resource Planning system, \$40.0 million to the Approved Labor Agreements Reserve for costs of existing labor agreements, \$16.6 million to the Capital Outlay Fund as unprogrammed funds to be used for various capital projects, and \$16.6 million to the Unfunded Pension Reserve.

### **Labor Costs**

Labor costs represent the single, most costly expense of the County and consumes approximately 45.6% of the County budget. The 2023-2024 Adopted Budget includes 7,313.0 full-time allocated and 733.7 part-time positions at a total cost of \$1,182.9 million. The Multiyear Budget Outlook primarily focuses on the salary and benefits costs for full-time positions and accounts for minimal cost increases for part-time position costs over the next five years. Key assumptions include:

- **Salary** projections for 2024-2025 are based on existing labor contracts, many of which have negotiated increases through 2025-2026.
- **Retirement** contributions are based on a rate of salary costs. The retirement contribution rate is projected to remain flat through 2026-2027 and increase slightly in 2027-2028, based on the most recent actuarial reports.  
The 2023-2024 projection includes the 5.0% additional retirement contribution amount at a General Fund cost share of \$10.4 million and future years are calculated at 5.0% of the total cost for that year.
- **Health** premiums are projected at a 6.0% growth per year through 2027-2028.

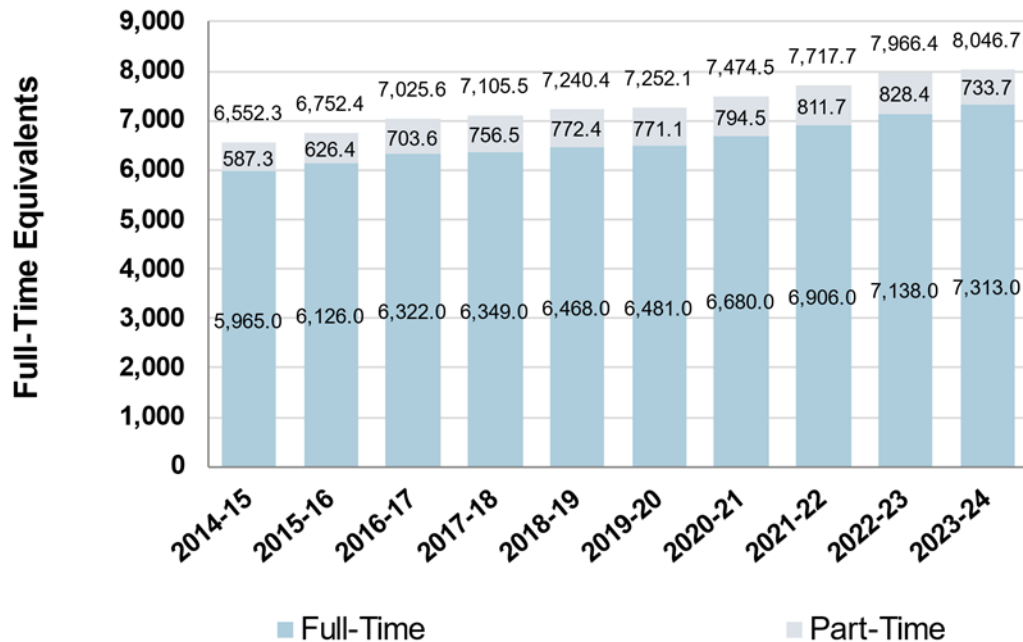
Approximately 65.5% of labor costs are funded by State/Federal programs and service charges/fees. The remaining 34.5% is provided by the County's General Purpose Revenue.

### **Others**

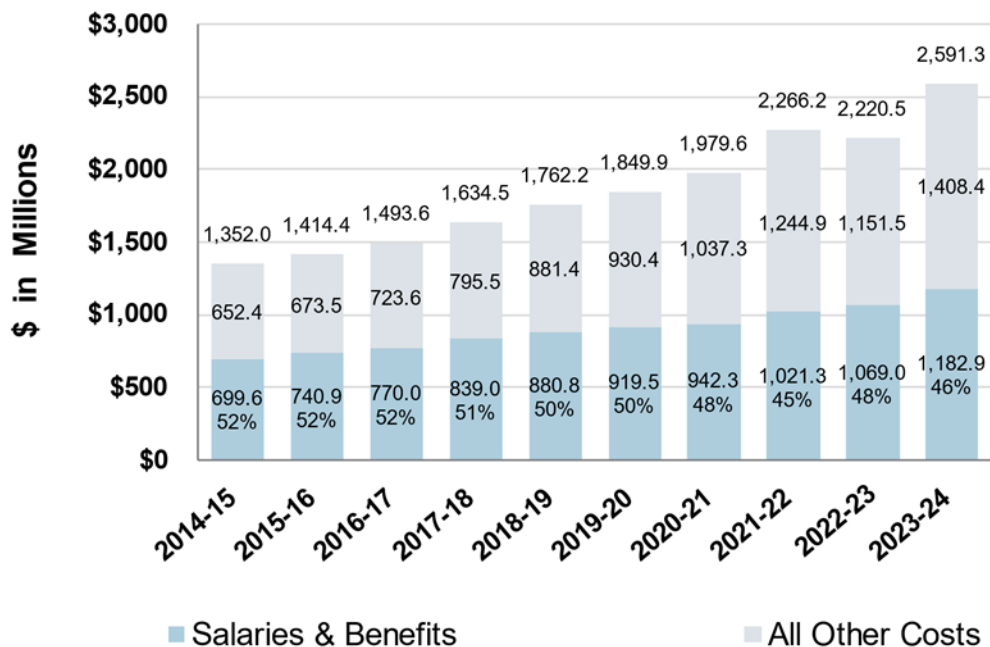
In addition to labor costs, the County is required to fund, from its General Purpose Revenue, Maintenance of Effort (MOE) contributions or required matches in order to receive certain Federal and State funds, long-term debt payments for County facilities financed with Certificates of Participation (COPs), and mandated programs such as General Assistance and elections. Generally, costs for these programs are projected to grow by approximately 3.0% per year through 2027-2028.

**Statistical Summary**  
**10-Year Trend: 2014-2015 to 2023-2024**

**Staffing Trend**

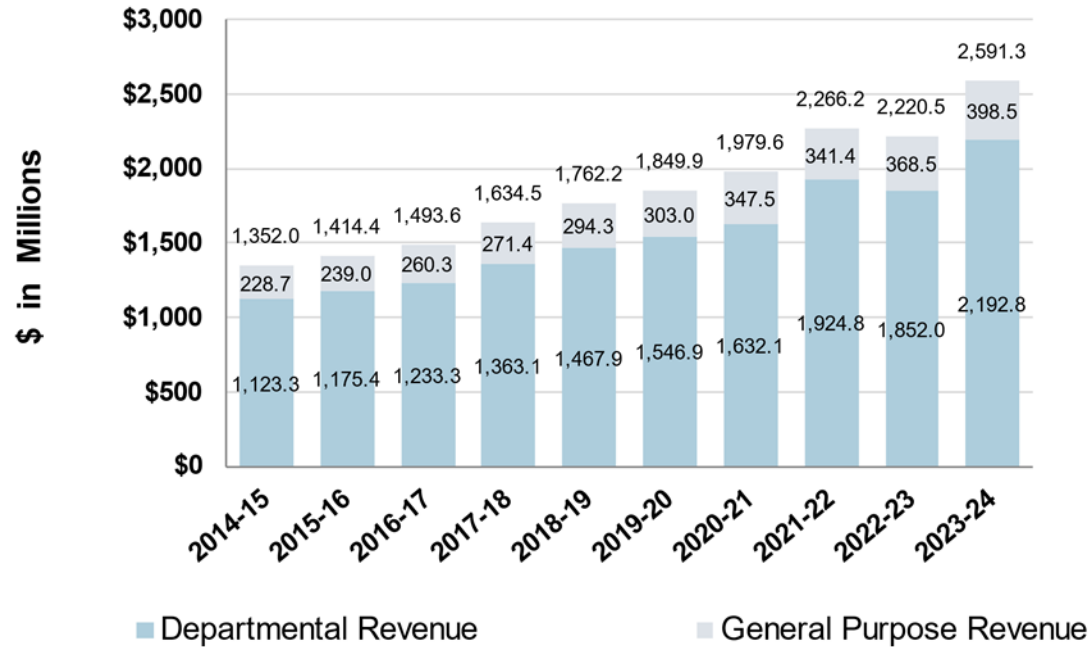


**Appropriations by Category**

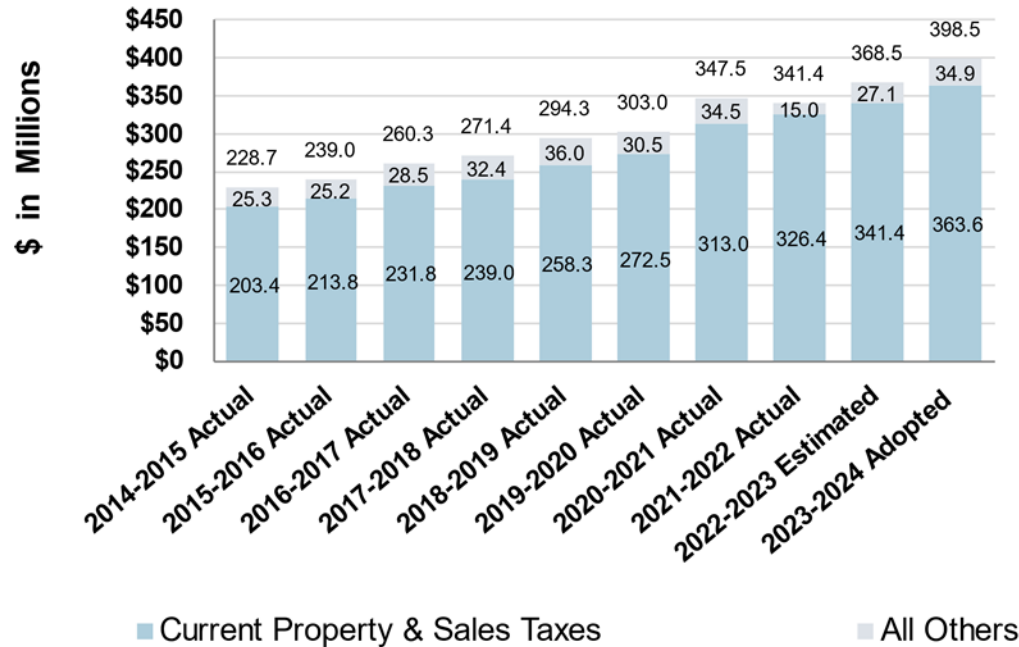




Appropriations by Source

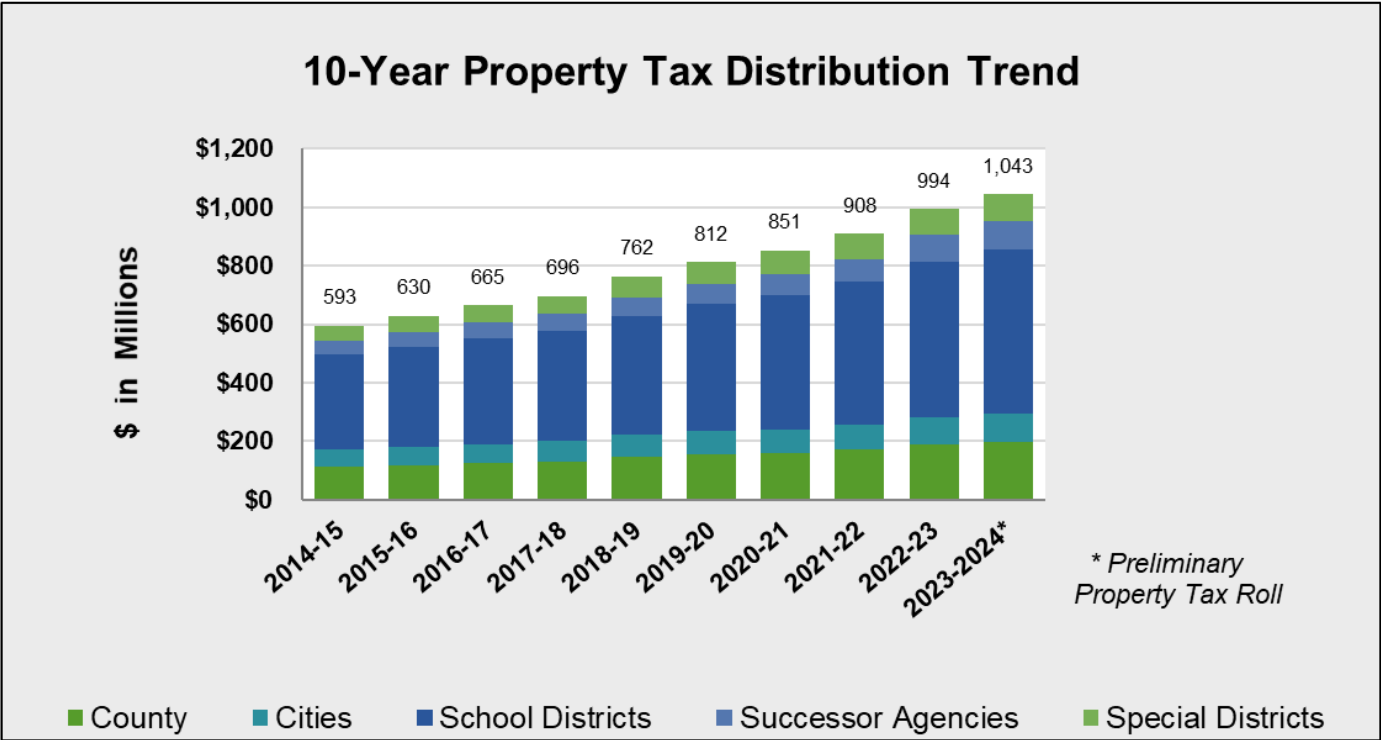
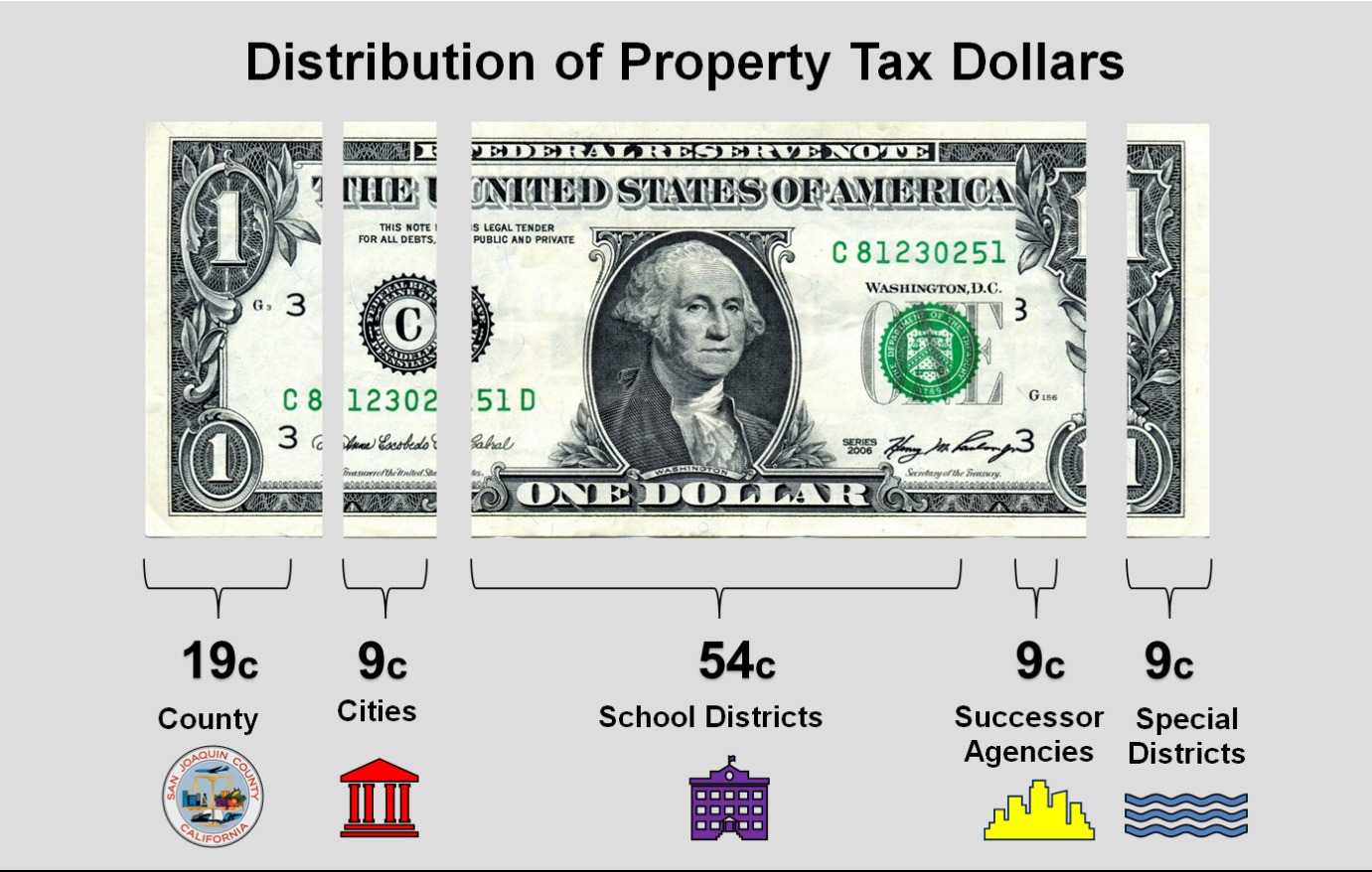


General Purpose Revenue Trend



# Distribution of Countywide Property Taxes

## 10-Year Trend: 2014-2015 to 2023-2024



## County Profile

	County	California
Population, 2022 estimate	793,229	39,029,342
Population, 2020	779,233	39,538,223
Population, 2010	685,306	37,253,956
Population, percent change, 2020 to July 1, 2022	1.8%	(1.3%)
Population, percent change, 2010 to July 1, 2022	15.8%	(0.6%)
Persons under 5 years, percent, 2020	6.6%	5.7%
Persons under 18 years, percent, 2020	26.7%	22.4%
Persons 65 years and over, percent, 2020	13.1%	15.2%
Female persons, percent, 2020	49.8%	50.0%
High school graduates, percent of persons age 25+, 2017-2021	80.3%	84.2%
Bachelor's degree or higher, % of persons age 25+, 2017-2021	19.5%	35.3%
Mean travel time to work (minutes), workers age 16+, 2017-2021	35.2	29.5
Housing units, July 2021	255,171	14,512,281
Homeownership rate, 2017-2021	59.1%	55.5%
Median value of owner-occupied housing units, 2017-2021	\$391,500	\$573,200
Median monthly owner costs with mortgage, 2017-2021	\$2,096	\$2,548
Median monthly gross rent, 2017-2021	\$1,387	\$1,698
Households, 2017-2021	234,662	13,217,586
Persons per household, 2017-2021	3.21	2.92
Per capita annual income (2020 dollars) 2017-2021	\$30,628	\$41,276
Median household income (2020 dollars) 2017-2021	\$74,962	\$84,097
Persons in poverty, percent	12.3%	12.3%
Persons with a disability, under 65, percent, 2017-2021	8.4%	6.8%
Persons without health insurance, under 65, percent	7.7%	8.1%
Unemployment rate, percent, March 2023	6.6%	4.8%

*Sources: U.S. Census Bureau, State of California Employment Development Department*



ADOPTED BUDGET

*General Government*

# General Government

## Appropriations

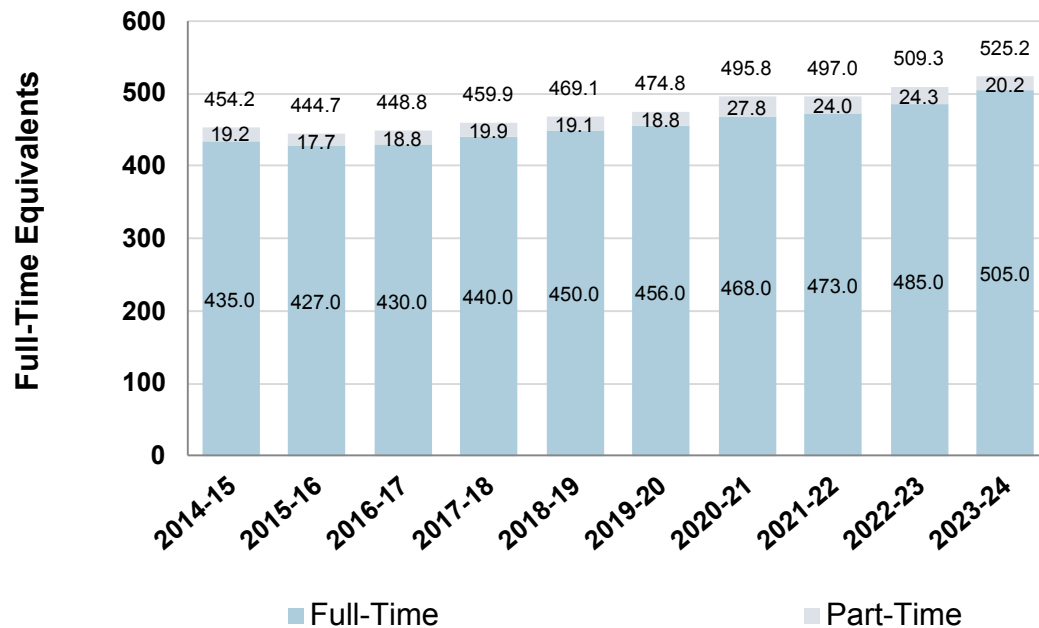
	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
1010100000 Board of Supervisors/Clerk of the Board	A-4	\$4,230,524	\$5,425,220	\$5,425,220	\$1,194,696
1010200000 County Administrator	A-8	4,962,597	6,059,627	6,059,627	1,097,030
1010800000 Auditor-Controller	A-13	3,176,135	4,363,712	4,363,712	1,187,577
1010804000 Operating Transfers	A-17	91,202,056	139,266,724	139,266,724	48,064,668
1010805000 Tobacco Settlement	A-19	7,300,000	7,300,000	7,300,000	0
1011000000 Treasurer-Tax Collector	A-21	8,021,915	7,962,676	7,962,676	(59,239)
<b>Summary — All Assessor-Recorder Budgets</b>	A-27				
1011100000 Assessor-Recorder-County Clerk	A-29	19,109,558	20,262,321	20,262,321	1,152,763
2025901000 Recorder-Equipment/Automation	A-34	1,614,639	2,212,072	2,212,072	597,433
1011200000 Purchasing & Support Services	A-35	390,313	255,942	255,942	(134,371)
8400112200 Purchasing ISF*	A-39	7,715,851	7,713,753	7,713,753	(2,098)
1011800000 County Counsel	A-41	1,200,411	710,869	710,869	(489,542)
1012400000 Human Resources	A-45	3,036,181	3,109,025	3,109,025	72,844
8592500000 Self-Insurance ISF-Health*	A-54	37,552,087	35,321,049	35,321,049	(2,231,038)
8592600000 Self-Insurance ISF-Dental*	A-56	6,641,423	5,916,147	5,916,147	(725,276)
8594800000 Self-Insurance ISF-Medical Malpractice*	A-58	3,299,071	3,811,984	3,811,984	512,913
8594900000 Self-Insurance ISF-Casualty*	A-60	13,930,329	17,258,253	17,258,253	3,327,924
8595000000 Self-Insurance ISF-Workers' Comp. *	A-63	14,909,187	16,810,075	16,810,075	1,900,888
8595100000 Self-Insurance ISF-Unemployment*	A-66	1,275,572	1,117,622	1,117,622	(157,950)
1013000000 Registrar of Voters	A-67	14,485,688	18,369,992	18,369,992	3,884,304
8240000000 Information Systems Division Internal Service Fund (ISF)*	A-72	34,831,667	40,611,612	40,611,612	5,779,945
8250000000 Office Automation ISF*	A-77	8,495,022	8,425,719	8,425,719	(69,303)
8260000000 Telephone ISF*	A-79	5,701,556	7,204,202	7,204,202	1,502,646
8270000000 Radio ISF*	A-82	3,569,822	8,235,868	8,235,868	4,666,046
1015400000 Economic Promotion	A-84	877,770	765,000	765,000	(112,770)
1016000000 Surveyor	A-87	604,864	672,965	672,965	68,101
1016500000 Rebates/Refunds & Judgments/Damages	A-89	36,000	41,000	41,000	5,000
1018000000 Equipment Use Allowance/ Debt Service	A-90	1,335,853	924,484	924,484	(411,369)
8190000000 Fleet Services ISF*	A-92	18,246,079	20,494,709	20,494,709	2,248,630
Less: ISF Appropriations*		(156,167,666)	(172,920,993)	(172,920,993)	(16,753,327)
<b>Total - General Government</b>		<b>\$161,584,504</b>	<b>\$217,701,629</b>	<b>\$217,701,629</b>	<b>\$56,117,125</b>

\*Internal Service Fund (ISF) appropriations are included in departmental budgets.

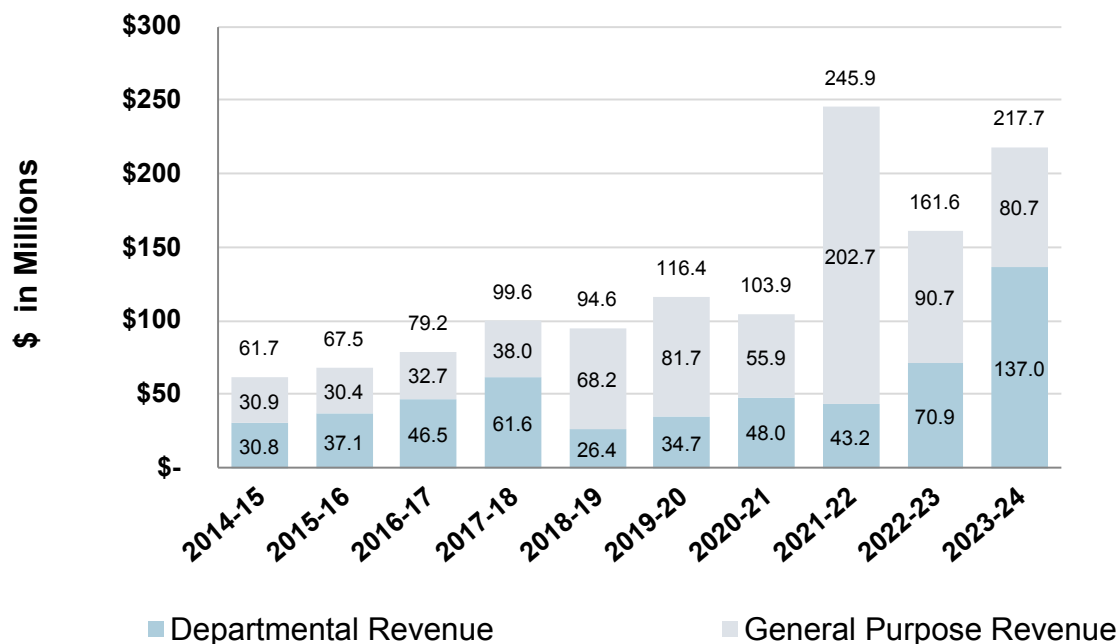
# General Government

## Appropriations

### Staffing Trend



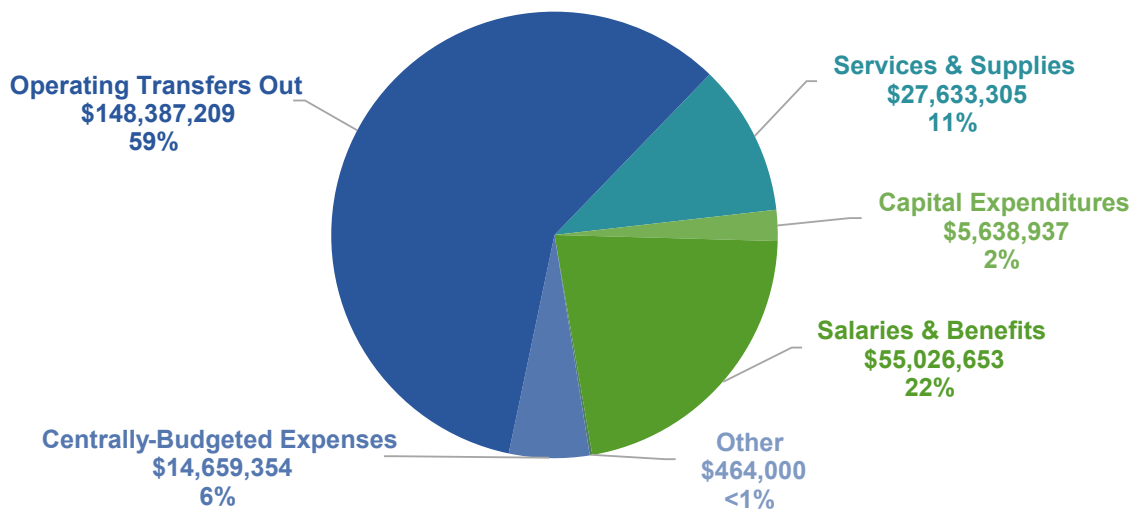
### Appropriations by Source



# General Government

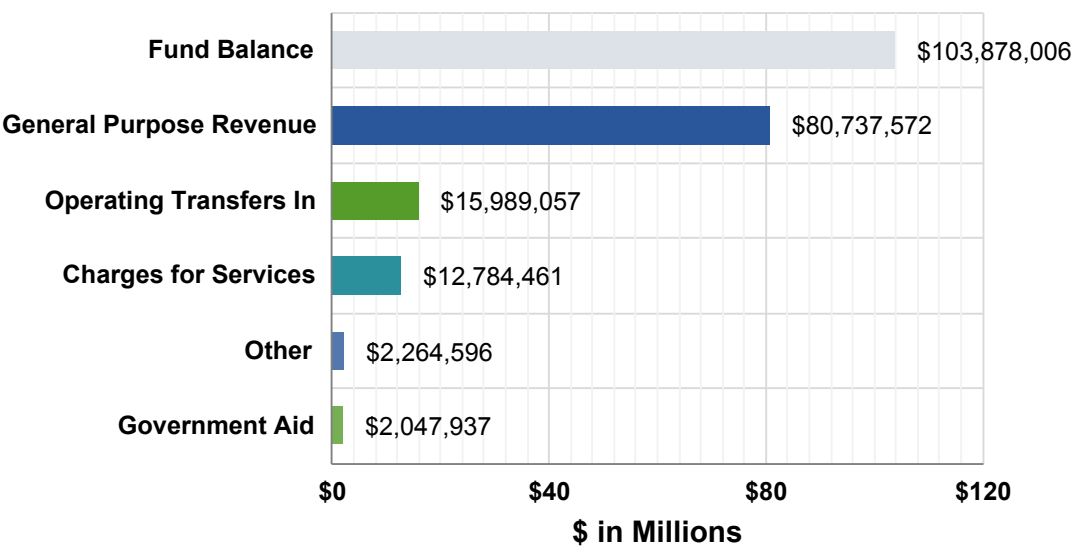
## Appropriations

**Use of Funds**  
**2023-2024 Adopted Budget**  
**Total Appropriations \$217,701,629 \***



\* \$251,809,458 Expenditures less \$34,107,829 Cost Reimbursements

**Source of Funds**  
**2023-2024 Adopted Budget**  
**Total Revenue \$217,701,629**



# 1010100000—Board of Supervisors/Clerk of the Board

## General Government

Robert Rickman, *Chairman*

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,513,093	\$2,698,868	\$3,054,862	\$3,054,862	\$355,994
Services & Supplies	138,380	182,651	1,459,468	1,459,468	1,276,817
Centrally-Budgeted Expenses	2,447,366	1,349,135	911,020	911,020	(438,115)
Total Expenditures	\$5,098,839	\$4,230,654	\$5,425,350	\$5,425,350	\$1,194,696
Expenditure Reimbursements	(15,164)	(130)	(130)	(130)	0
Total Appropriations	\$5,083,675	\$4,230,524	\$5,425,220	\$5,425,220	\$1,194,696
<b>Earned Revenues By Source</b>					
Charges For Services	\$9,963	\$8,275	\$8,275	\$8,275	\$0
Total Revenues	\$9,963	\$8,275	\$8,275	\$8,275	\$0
<b>Net County Cost</b>	\$5,073,712	\$4,222,249	\$5,416,945	\$5,416,945	\$1,194,696
<b>Allocated Positions</b>	17.0	18.0	18.0	18.0	0.0

## Purpose

The Board of Supervisors (Board) is mandated by law and responsible to ensure the public trust through representative government. As the governing body of the County, the Board:

- Sets County and public policy.
- Adopts ordinances/resolutions.
- Appropriates funds and levies necessary fees.
- Represents the citizens of San Joaquin County in matters involving the State/Federal governments.
- Plans land use and determines zoning for unincorporated areas.
- Represents the public on several County commissions, special district boards, and local committees.
- Works with constituents to resolve problems and issues.

The Clerk of the Board (COB) office maintains the Board of Supervisors legislative history and prepares agendas, minutes, and resulting documents for the Board of Supervisors, Countywide Oversight Board, City Selection Committee and two Assessment Appeals Boards. The COB receives Assessment Appeals Applications, maintains the Boards and Commissions Rosters and Fact Sheets for over 50 commissions and 500 volunteers, prepares the Board/COB budget, records all claims against the County, administers the Hearing Officer Panel and Lobbyist Registration Log, and provides administrative support to the Board of Supervisors.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:



# 1010100000—Board of Supervisors/Clerk of the Board

## General Government

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Work with Human Resources to review classification and compensation structure of classes in the Clerk of the Board's (COB) Office	Class structure which makes succession planning challenging and does not encourage internal promotion	Class structure which ensures professional roles are reflected and encourages succession planning and internal promotion	June 2024
Demonstrate Leadership Development	Current	Target	Deadline
➤ COB to complete NACo High Performance Leadership Academy	12-week program that began January 2023	Complete	April 2023
➤ Chief Deputy Clerk to complete NACo High Performance Leadership Academy	12-week program that begins July 2023	Complete	November 2023
➤ Expand membership to California Clerk of the Board of Supervisors Association	One full-year membership and three half-year memberships	Four full-year memberships	July 2023
Augment Digitization and Automation	Current	Target	Deadline
➤ Contract with Rolling Orange, Inc. to design a professional website for the Board of Supervisors and Clerk of the Board	Boilerplate website created by Information Systems Division and maintained by COB	Professionally designed website maintained by COB staff	June 2024

## Major Budget Changes

### Salaries & Employee Benefits

- \$219,124 Salary and benefits adjustments.
- \$136,870 Full-year cost of Public Information Specialist.

### Services & Supplies

- \$1,250,000 Increase in allocation for district specific project funds based on Board established policy.
- \$20,000 Increase in travel costs.

### Centrally-Budgeted Expenses

- \$79,244 Increase in Casualty insurance costs.
- (\$525,363) Cost Allocation Plan adjustment.

## Program Discussion

The 2023-2024 recommended budget for the Board of Supervisors (Board)/Clerk of the Board (COB) totals \$5,425,350, which is an increase of \$1,194,696 from the 2022-2023 adjusted budget.

### Board of Supervisors

In 2022-2023, San Joaquin County voters elected two new Supervisors to the Board, Paul Canepa of District 2 and Steven J. Ding of District 4. Supervisors Katherine Miller and Charles Winn termed out of office at the end of 2022, both having completed two full terms.

Following the June 2022 election, the Board formed an ad hoc Citizen's Election Advisory Committee to review and evaluate the integrity of San Joaquin County elections. The Board received a report from the Registrar of Voters on the findings of this review and in 2023, directed staff to bring back recommendations for a standing Citizen's Election Advisory Committee to provide ongoing review of the election process in San Joaquin County. On April 11, 2023,

# **1010100000—Board of Supervisors/Clerk of the Board**

## **General Government**

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the Board approved the composition, role, responsibilities, and operating procedures of the Election Advisory Committee.

In March 2023, the Board officially ended its nearly three-year local emergencies related to the COVID-19 pandemic, while declaring two new and separate winter storm emergencies in January and March of 2023, respectively. Extreme winter storm weather due to atmospheric rivers has brought record-breaking rain and snow, challenging local waterways and levee systems throughout the County.

The Board reached agreements with four bargaining units and approved resolutions with four unrepresented units reflecting significant wage increases over the next three years including a 6% increase in October 2022, 5% in July 2023, 4% in July 2024, and 3% in July 2025. The Board further directed staff to evaluate establishing a Human Resources Division (HR) within the Sheriff's Office to address hiring difficulties within the Office. After further discussions between HR and the Sheriff, the Board approved adding two Personnel Analysts in the HR Division; the staff will be assigned to work at the Sheriff's Department, effective July 1, 2023.

In June 2022, the Board appointed Richard Castro as the new Chief Executive Officer of San Joaquin General Hospital, the first step toward implementing a Management Services Agreement in which Dignity Health provides assistance in the day-to-day administration of the County's hospital.

On September 27, 2022, the Board adopted an illegal dumping ordinance to protect County and City roadways, waterways, and private and public property from illegal dumping, which among other things, makes any vehicle or trailer owner liable and responsible if their vehicle or trailer is used for illegal dumping (Ordinance No. 4604). The Board also directed staff to explore the adoption of a shopping cart ordinance to address the stolen and abandoned shopping carts in the unincorporated County.

On January 24, 2023, the Board created a Homeless Review Ad Hoc Committee to gather information about services provided to vulnerable unsheltered populations and bring a proposal to the Board for consideration to address any gaps in services. The Board appointed Supervisors Patti (District 3) and Canepa (District 2) to the Ad Hoc Committee, which has been meeting regularly with providers and local agencies to gather this information. It is anticipated the Board will receive a report and take action before the end of 2022-2023.

In support of local non-County agencies who provide vital services to the residents and veterans of San Joaquin County, the Board authorized \$12.5 million from the American Rescue Plan Act (ARPA) to fund various projects for 16 Fire

Districts and \$2.6 million to fund various projects for 6 Veterans Service Organizations. The Board further directed staff to evaluate options for the relocation of the Veterans Services Office (VSO). The VSO successfully relocated in February of 2023 to a temporary location within the County's Employment and Economic Development Department campus at 6221 West Lane, Stockton. This will provide greater access and space necessary to serve veterans.

The Board will continue to focus on its strategic priorities and serving the people of the County, working with County departments to ensure optimal organizational structure.

### ***Supervisory District Funds***

In May 2023, the Board adopted the Use Guidelines and Process for Supervisory District Funds. Key elements included in the Guidelines are as follows:

1. The County Administrator, as part of the Proposed Budget each year, may allocate up to \$250,000 for each supervisory district. In years that the County budget is not structurally balanced, no funds will be available for this purpose.
2. Unspent funds will not be carried forward into the following fiscal year.
3. The Auditor-Controller will maintain and track the uses of these funds by supervisory districts.
4. A Board Member, upon review of the merits and needs of the proposed projects or activities, will prepare recommendations for the Board's consideration regarding the use of Supervisory District Funds. Supervisory district-funded projects must be approved by a simple majority vote of the Board and subject to existing County policy and business practice.
5. Board approval of projects should include consideration of the following:
  - a. Supervisory District Funds can be used as start-up funds for community programs or activities benefiting the community within the respective supervisory district.
  - b. The recommended projects or activities will primarily result in public benefit within the supervisory district, but those benefits may extend beyond the proposing district limits.
  - c. The recommended projects or activities will have a nexus to County-operated or funded programs.
  - d. Funding for projects or activities should be considered one-time and not be used for

# **1010100000—Board of Supervisors/Clerk of the Board**

## **General Government**

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- ongoing funding support from Supervisorial District Funds.
- e. Any organization receiving funding must agree to be audited as required by the County.
  - f. Funds cannot be allocated on a retroactive basis.
  - g. Funds cannot be used for political purposes.
6. Board Members may identify projects or activities proposed to be funded with Supervisorial District Funds, to be included as part of the upcoming budget. Once identified, the County Administrator will include these projects and/or activities as part of the Proposed Budget to be considered by the Board of Supervisors during Final Budget hearings. If approved, these projects and/or activities will not require a separate midyear Board review and will be implemented by appropriate County staff. Projects not in the Adopted Budget will require a separate Board item and be subject to a simple majority vote of the Board.

The 2023-2024 Board of Supervisors/Clerk of the Board Budget includes a General Fund contribution of \$250,000 for each Supervisorial District, for a total of \$1.25 million.

### **Clerk of the Board**

As the liaison to the public, the COB attended community events including the Stand Down Veteran's Event hosted by State Assembly member Carlos Villapudua, District 13, and

the Easter Egg Hunt hosted by the San Joaquin County Parks Division at Micke Grove. The COB gave presentations to members of the public at the Mega Municipal Advisory Councils meeting, Lockeford Municipal Advisory Council meeting, and was a guest speaker at the monthly Retired Employees' Association luncheon. The COB also facilitates presentations by the County Administrator, County Counsel, and Clerk of the Board offices to the Greater Stockton Chamber of Commerce Leadership class each year in December.

The COB facilitated in-person special events including recognition of First Responders, Veterans, Boards and Commissions volunteers and the County Executive leadership team. The COB resumed in-person Youth in Government Day for the first time in October 2022, collaborating with the San Joaquin County Office of Education to offer students throughout San Joaquin County an opportunity to meet with various County departments and learn about a career in public service. This year included the addition of hands-on demonstrations by the Sheriff, Probation, Montezuma Fire District, and Public Works of some of the heavy equipment used in their day-to-day operations.

The COB will continue to efficiently and accurately administer democratic processes, ensuring transparency and equitable access to the people's business. In 2023-2024, the COB will evaluate new technology to provide improved services including Agenda management programs, records digitization, and website development.

# 1010200000—County Administrator

## General Government

Jerome C. Wilverding, County Administrator  
[www.sjgov.org/departments/cao](http://www.sjgov.org/departments/cao)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$3,485,898	\$3,613,346	\$4,454,874	\$4,454,874	\$841,528
Services & Supplies	2,176,174	2,037,530	2,484,465	2,484,465	446,935
Centrally-Budgeted Expenses	463,855	614,554	779,072	779,072	164,518
Total Expenditures	\$6,125,927	\$6,265,430	\$7,718,411	\$7,718,411	\$1,452,981
Expenditure Reimbursements	(4,015,382)	(1,302,833)	(1,658,784)	(1,658,784)	(355,951)
Total Appropriations	\$2,110,545	\$4,962,597	\$6,059,627	\$6,059,627	\$1,097,030
<b>Earned Revenues By Source</b>					
Charges For Services	\$135,176	\$382,258	\$174,177	\$174,177	(\$208,081)
Miscellaneous Revenues	3,958	0	0	0	0
Operating Transfers In	0	220,000	662,000	662,000	442,000
Total Revenues	\$139,134	\$602,258	\$836,177	\$836,177	\$233,919
<b>Net County Cost</b>	\$1,971,411	\$4,360,339	\$5,223,450	\$5,223,450	\$863,111
<b>Allocated Positions</b>	13.0	15.0	16.0	16.0	1.0

## Purpose

The County Administrator leads the administrative functions of County government. Specifically, the position oversees five departments; directs and coordinates all other County departments and agencies; acts to enforce ordinances, policies, rules, and regulations as adopted by the Board of Supervisors; advises and makes recommendations to the Board on a vast number of issues; supervises preparation of the annual County budget; monitors departmental and agency revenues and expenditures throughout the fiscal year; prepares the County's legislative platforms and monitors legislation that can significantly affect County programs; coordinates and leads efforts/activities related to County economic development; and leads efficiencies in customer service delivery, innovation, and labor negotiations.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve County vacancy rate	16.4 % vacancy rate as of March 2023	Reduce Countywide vacancy rate by 2%	June 2024

# 1010200000—County Administrator

## General Government

Fiscal Optimization			
Effectively Manage One-Time Funds	Current	Target	Deadline
➤ Develop and Maintain American Rescue Plan Act (ARPA) list	Commitment list approved in October 2022	Full commitment of funds	December 2024
Responsibly Consider Resources Addressing Pension Liability	Current	Target	Deadline
	\$0	\$50 million	June 2022
➤ Pension Costs – 115 Trust	\$50 million	\$70 million	June 2024
	\$70 million	\$90 million	June 2025

### Major Budget Changes

#### Salaries & Employee Benefits

- \$136,974 Salary and benefits adjustments.
- \$441,420 Full-year costs of Assistant County Administrator added midyear 2022-2023.
- \$182,087 Full-year costs of Management Analyst III added midyear 2022-2023.
- \$81,047 Add a Senior Office Assistant.

#### Services & Supplies

- \$500,000 Increase in one-time expense for Delta College Internship Program for 2023-2024.
- \$430,520 Increase in advertising and media costs for illegal dumping efforts.
- \$171,316 Increase in special departmental expense for unanticipated Board of Supervisors' projects.
- (\$650,578) Decrease in consultant services expense due to one-time payment in 2022-2023.

#### Centrally-Budgeted Expenses

- \$223,222 Increase in data processing charges.
- (\$63,268) Decrease in Casualty insurance costs.

#### Expenditure Reimbursements

- \$355,951 Cost Allocation Plan adjustment.

#### Revenues

- (\$208,081) Decrease in A-87 reimbursement from non-County agencies.

#### Operating Transfers In

- \$442,000 Increase in Operating Transfers from ARPA funds for illegal dumping efforts.

### Program Discussion

The 2023-2024 recommended budget for the County Administrator's Office (CAO) totals \$7,718,411, which is an increase of \$1,452,981 from the 2022-2023 adjusted budget.

Included in the increase are full-year costs of two positions added midyear 2022-2023. On December 13, 2022, the Board approved adding an additional Assistant County Administrator position to the CAO budget to fully support and execute the Board's policy directives, including the Board Strategic Priorities for 2022-2025 (R-22-225). On March 14, 2023, the Board approved adding a Management Analyst III to the CAO budget to assist in implementing a new budget system and assist with the Countywide Enterprise Resource Planning effort (R-23-42).

The following highlights provide an overview of several projects, programs, and activities led and administered by the CAO.

# 1010200000—County Administrator

## General Government

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### Economic Recovery

The County continues to deploy the American Rescue Plan Act (ARPA) funds received to offset the economic impacts of COVID-19. These funds totaled \$148.0 million and were received in two tranches the past two fiscal years. The goal has been to get these funds into the community as judiciously and quickly as possible, and nearly all of these funds have been committed to date.

A variety of projects targeting high priorities within the County include transitional and supportive housing, the expansion of behavioral health workforce in the County, improvements to veterans' facilities, mitigation of illegal dumping, and numerous projects within County Departments and fire agencies which benefit the County and constituents.

Spending priorities were developed in previous fiscal years based on a recovery plan, constituent survey, Board feedback, and discussions with County business groups. The spending plan will deploy the related funds over the next several years and will be fully spent by the required Federal deadline of December 2026.

### Professional Development

Professional development of the County's executive and senior staff is a high priority for the CAO.

Through October 2022, department heads and their senior staff were encouraged to enhance leadership development through Franklin Covey's training platforms – Jhana and All Access Pass. These platforms provided participants valuable resources to support their everyday activities, as well as self-paced courses to reframe, provoke ideas, build relationships, or teach and reinforce skills.

While continuing to support development growth, the CAO engaged the services of GoldSRD, a leading provider of staff augmentation, executive recruiting, and professional development services. GoldSRD provided a half-day training to department heads and senior management with a focus on negotiating and emotional intelligence, which are two critical components of effective leadership.

In 2023-2024, the CAO plans to explore and contract services for additional Countywide leadership training for executive and senior management staff.

### Labor Related Costs

During 2022-2023, new memorandums of understanding (MOUs) were reached with the Service Employees International Union (SEIU), covering six bargaining units (B-22-567) and the Attorneys Association (B-22-589). This represents 78% of the County's represented employees.

An agreement amending the MOU for the Middle Management unit was also reached with the SJC Management Association (B-22-624). This agreement included extending the expiration of the MOU from June 30, 2023, to June 30, 2027. During 2022-2023, seven agreements were reached, extending the existing MOU by one year. One-year extension agreements were reached with the Deputy Sheriffs Association, Sheriff Deputy Sergeant Association, Law Enforcement Management Association, and the California Nurses Association (B-22-591); Union of American Physicians & Dentists (B-22-625); the Probation Officers Association (B-22-677); and the Correctional Officers Association (B-23-15). Bargaining began during 2022-2023 with the District Attorney Investigators Association; MOU expires on June 30, 2023.

Bargaining will continue during 2023-2024 with the Union of American Physicians & Dentists, whose MOU expires on January 5, 2024; the California Nurses Association, whose MOU expires on April 30, 2024; and the Sheriff Deputy Sergeants Association, whose MOU expires on June 30, 2024.

### Property Tax Sharing Agreements with Cities

In 2022-2023, the County was approached by the cities of Lathrop and Lodi to ask about addressing long-standing issues related to property tax sharing agreements. These agreements are designed to be structured so the County and a city receive an appropriate property tax share when an annexation occurs. This tax sharing should be equitable so that each jurisdiction is able to cover its cost of services in the newly annexed area.

On January 10, 2023, the Board of Supervisors approved a Tax Allocation Agreement with the City of Lathrop (B-23-27). For Lathrop, a long-standing anomaly was resolved which had resulted from a change in land use impacting the West Lathrop Specific Plan development, primarily impacting the River Islands development.

The City of Lodi had not had an agreement with the County since 2012, due to the inability to come to terms on a sharing amount. On February 28 2023, the County and the City of Lodi were able to come to an agreement that provides economic benefits to both Lodi and the County for upcoming annexations in the city's sphere of influence (B-23-90).

### Projects and Activities

Throughout 2022-2023, the County Administrator actively participated in several successful projects and activities. The County Administrator's Office will continue to provide leadership and support in 2023-2024 for ongoing projects and activities:

# 1010200000—County Administrator

## General Government

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➤ **Legislative Platforms** – In April 2023, CAO staff presented for Board consideration, the County’s Biennial State and Federal Legislative/Regulatory Platforms and Policy Guidelines for 2023 and 2024. The Platforms provide a means of communicating the County’s legislative and regulatory agendas, the Board Strategic Priorities and interests, and guide the County’s legislative advocacy efforts, allowing the County to take positions on pending legislation and regulations in a timely manner. Legislative issues not identified in the Platforms will be presented to the Board for consideration as they emerge. The Board of Supervisors approved the 2023-2024 Legislative Platforms on April 25, 2023 (B-23-673).

➤ **Registrar of Voters (ROV)** – During this past year our County conducted mid-term Primary and General Elections. The Primary was challenged by the untimely passing of our new ROV, Heather Ditty, and was impacted by a ballot printing issue which required much manual intervention to properly process the effected ballots. Despite this, the Election was performed accurately and within the statutory timeframes. Experiences with the Primary Election, along with the appointment of a new ROV, provided for a smooth General Election.

To increase election integrity and transparency, the Board established an Elections Advisory Committee (EAC) on April 11, 2023 (B-23-164). The purpose of the EAC is to increase voter confidence, public trust, and voter engagement in the County. The ROV Office has also been restructured and expanded to provide more capacity and oversight over elections activity. The ROV is better positioned for successful, voter-engaged activities for the 2024 Presidential Primary and General Elections.

➤ **San Joaquin General Hospital (SJGH)** – Beginning July 1, 2022, the County entered into a Management Services Agreement (MSA) between SJGH and Dignity Health (a component of CommonSpirit Health) (B-22-233). The purpose of the MSA is to leverage on the expertise and resources of Dignity Health to enhance the clinical and financial operations of SJGH. As a part of the MSA, a new Chief Executive Officer was installed at SJGH along with other key executive staff. The new management team has been implementing clinical, operational, and fiscal best practices, and streamlining functions to optimize efficiency and effectiveness.

In addition to strengthening the SJGH management team, the MSA has provided the opportunity to utilize Dignity’s vendor base to take advantage of pricing for a variety of medical and non-medical materials and

supplies. This process is still in the early stages, and the County looks forward to expanding this beneficial process further within SJGH and also to other County health care functions outside the Hospital.

The initial 18-month phase of the MSA will conclude in the middle of 2023-2024, with plans to extend that phase. Plans are currently in progress regarding the length of this extension and how the County might eventually move toward a second phase of this MSA.

➤ **Former In-Shape Building** – The County continues to move forward with the development of the former In-Shape building located at 6 South El Dorado Street, Stockton, tailoring to the needs of the District Attorney’s Office. The architectural and design phase was recently completed and the project will be moving into the renovation phase. The completion date of December 2024 is still on target.

### Economic Development

During 2022-2023, the CAO continued to support the efforts of County departments and community agencies focused on advancing economic development opportunities throughout the County. The following highlights provide an overview of efforts administered by the CAO:

➤ **Airpark 599 Project** – In its current configuration, Airpark 599 is planned to include approximately 3.5 million square feet of industrial space, in addition to approximately 12,000 square feet of commercial space. The project is driving new economic activity adjacent to the Stockton Metropolitan Airport and is expected to create approximately 5,000 new jobs at project buildout, depending on the businesses sited within the industrial park.

In March 2023, construction was completed on the first industrial building (Building 4) consisting of 1.2 million square feet on approximately 58 acres. Catellus is actively marketing the building to prospective tenants. A second, even larger building is under construction (Building 1) consisting of a 1.4 million square foot logistics facility on approximately 112 acres. Target Corporation has entered into a lease for the building, planned for occupancy in the third quarter of 2023-2024. Approximately 2,500 employees will staff the new facility, with seasonal variations.

In 2023-2024, County staff will continue to collaborate with Catellus and project consultants to ensure the successful buildout and marketing of the project.

➤ **iHub San Joaquin (iHub SJ)** – CAO staff continues to participate as a member of the iHub San Joaquin Board of Directors. The County and other public and private sector partners continue to invest local funding and

# 1010200000—County Administrator

## General Government

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provide in-kind contributions to support iHub’s efforts to stimulate partnerships, economic development, and job creation.

In 2023-2024, iHub SJ will continue to work with partners throughout the region to provide opportunities that foster the Agri-Business, Health Care, and Sustainable Construction technologies. Events include workshops, technical assistance or referrals, conferences, industry and technology showcases, industry matchmaking, and entrepreneurial pitch competitions. iHub SJ is also working with the San Joaquin Partnership, educational institutions, civic incubators, and others to convene County stakeholders on planning efforts to undertake inclusive economic and community development opportunities with the State through the Community Economic Resiliency Fund (CERF) program. In 2023-2024, iHub SJ will host the annual Hackathon in partnership with the San Joaquin County Office of Education and CodeStack Academy. This one-day competition challenges middle school, high school, and college students to develop applications to solve water issues.

- **Tourism Recovery** – In March 2023, the County entered into agreements with City of Tracy, Downtown Stockton Alliance, Lodi Winegrape Commission, Rampant Creative, Visit Lodi Conference & Visitors

Bureau, and Visit Stockton to augment promotional efforts to increase awareness and drive visitation to Countywide activities, businesses, destinations, and events through various strategies, including web-based marketing, social media, radio, television, and print advertisements. The goal is to help consumers rediscover San Joaquin County as a compliment to broader economic recovery efforts, encourage residents and visitors to support local businesses, and promote the County as a year-round destination.

### Supplemental Request

The County Administrator is requesting supplemental funding totaling \$85,047 for the following:

#### *Senior Office Assistant*

Funding is requested in the amount of \$85,047 for one Senior Office Assistant, and associated equipment costs, to support the increased workload in the Office. The Office Assistant will assist with sorting and sending mail, scanning and filing office records, reviewing and formatting documents, manage contact rosters, ordering office supplies, and other basic clerical duties to support the Office.

The recommended budget has been augmented by \$85,047 to address this request.



# 1010800000—Auditor-Controller

## General Government

Jeffery M. Woltkamp, Auditor-Controller  
[www.sigov.org/department/aud](http://www.sigov.org/department/aud)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$3,888,289	\$4,704,782	\$5,040,081	\$5,040,081	\$335,299
Services & Supplies	425,880	402,590	481,353	481,353	78,763
Centrally-Budgeted Expenses	2,218,628	2,411,363	2,286,011	2,286,011	(125,352)
Capital Expenditures	13,536	0	0	0	0
Total Expenditures	\$6,546,333	\$7,518,735	\$7,807,445	\$7,807,445	\$288,710
Expenditure Reimbursements	(4,755,872)	(4,342,600)	(3,443,733)	(3,443,733)	898,867
Total Appropriations	\$1,790,461	\$3,176,135	\$4,363,712	\$4,363,712	\$1,187,577
<b>Earned Revenues By Source</b>					
Interest/Rents	\$199	\$0	\$0	\$0	\$0
Aid From Other Governments	26,085	24,000	26,000	26,000	2,000
Charges For Services	1,251,184	1,525,702	1,399,915	1,399,915	(125,787)
Miscellaneous Revenues	251,749	180,050	150,000	150,000	(30,050)
Total Revenues	\$1,529,217	\$1,729,752	\$1,575,915	\$1,575,915	(\$153,837)
<b>Net County Cost</b>	\$261,244	\$1,446,383	\$2,787,797	\$2,787,797	\$1,341,414
<b>Allocated Positions</b>	34.0	35.0	35.0	35.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	0.7	0.0	0.0	0.0	0.0
<b>Total Staffing</b>	34.7	35.0	35.0	35.0	0.0

## Purpose

The Auditor-Controller's Office (ACO) provides accounting and auditing services for departments, districts, and agencies throughout the County.

The ACO has four major functions:

- Property tax calculations and allocations;
- Employee payroll and benefits maintenance;
- Fund and budget reporting, accounts payable, and claim processing; and
- Internal audits and cost allocation.

Functions of the Auditor-Controller are mandated while service levels are discretionary. Duties include maintenance of accounting records, preparation of financial reports, auditing, processing payments and payrolls, and a wide variety of accounting support to County operations.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

# 1010800000—Auditor-Controller

## General Government

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve office vacancy rate	14.7% as of June 30, 2022	3% vacancy rate 0% vacancy rate	June 2023 June 2024
Demonstrate Leadership Development	Current	Target	Deadline
➤ Obtain professional staff certifications	No Certified Internal Auditors (CIAs) on staff	One or more CIAs on staff	June 2024
Augment Digitization and Automation	Current	Target	Deadline
➤ Implement departmental voucher scanning functionality	Only San Joaquin General Hospital submits electronically	All County departments submit electronically	June 2024
➤ Implement a telephone directory system for incoming calls to main line	All incoming main line calls go to multiple individuals at once	New system will prompt callers to select a desired division	June 2023
➤ Implement electronic vendor payments	Limited instances of manually-processed wires	Electronic (ACH) payments to all requesting vendors	June 2024
Fiscal Optimization			
Proactively Manage Labor Costs	Current	Target	Deadline
➤ Decrease overtime costs	Under \$20,000 in 2022-2023	Under \$5,000 per fiscal year	June 2024

## Major Budget Changes

### Salaries & Employee Benefits

- \$335,299 Salary and benefits adjustments.

### Services & Supplies

- \$102,364 Increase in independent audit fees.
- \$6,183 Increase in stationary office expense for newly elected Auditor-Controller.

### Centrally-Budgeted Expenses

- (\$100,981) Decrease in data processing charges.
- (\$30,014) Decrease in Casualty insurance costs.

## Expenditure Reimbursements

- (\$8,188) Decrease in accounting and auditing charges.
- (\$890,679) Cost Allocation Plan adjustment.

## Revenues

- \$60,000 Increase in property tax assessment processing fees.
- \$55,000 Increase in charges to outside agencies.
- \$10,000 Increase in outlawed warrants.
- (\$40,000) Decrease in other sales.
- (\$240,787) Decrease in Cost Allocation Plan reimbursement from non-County agencies.

# **1010800000—Auditor-Controller**

## **General Government**

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### **Program Discussion**

The 2023-2024 recommended budget for the Auditor-Controller's Office (ACO) totals \$7,807,445, which is an increase of \$288,710 from the 2022-2023 adjusted budget.

The ACO performs essential operational business functions for the County and operates as the County's financial hub. These functions include property tax, payroll, general accounting, internal auditing, grants, and cost allocations. In 2022-2023, the ACO calculated and allocated \$1.02 billion in property tax revenue to the County, its 7 cities, 14 school districts, 132 Special Districts, and 4 redevelopment successor agencies, which is an increase of approximately \$86.9 million from 2021-2022. The gross annual salary and benefits processed for fiscal year 2021-2022 for the County and Special Districts exceeded \$1.08 billion and covered over 8,000 employees. Over 140,000 checks to vendors are processed each year. The ACO also tracks and accounts for grant money from Federal and State sources allocated for schools, human services, public safety, and realignment.

Additionally, the ACO is responsible for the County's financial reporting and controls. This includes the annual financial audit, audits of Special Districts (Board-governed and locally-governed), single audits of grant programs, and Title 2, Code of Federal Regulations, Part 200 - Cost Allocation Plan. The previous contract with an independent audit firm, Eide Bailly, LLP, to provide single audit services for fiscal year 2021-2022 expired, and the County initiated a request for proposal for a new contract for fiscal year 2022-2023 and beyond.

In 2019-2020, the ACO engaged the NBS Government Finance Group (NBS) to generate the County's Cost Allocation Plan and submission to the State Controller's Office. The purpose of the engagement was to leverage NBS's knowledge and experience as a premier provider of cost-plan services for local governments. The ACO is contracted with NBS for services through 2023-2024. This successful collaboration produced a more equitable allocation of Countywide indirect costs.

### **Payroll Division**

The ACO's Payroll Division recently completed a multi-year implementation of system enhancements involving electronic timesheet entry and absence management capabilities. Ongoing improvements will continue during fiscal year 2023-2024, involving long-term leave management and other user-interface enhancements, including mobile functionality.

### **Audit Division**

As the financial oversight function for the County, the Auditor-Controller maintains an Internal Audit Division, which performs mandated and discretionary audits. In 2022-2023, the Division completed mandatory projects, such as the quarterly and annual Treasury compliance audits, County departmental cost rate calculations, and the 2023-2024 Countywide Cost Allocation Plan. Filling staffing vacancies allowed for minimal discretionary audits to resume, including County trust fund audits, review of the Sheriff's Office departmental cash handling procedures, and best practice analysis for the District Attorney's Office.

The audits planned for 2023-2024 are mandatory audits of Treasury quarterly and annual compliance, discretionary audits of County departmental cash handling procedures, departmental Board of Supervisors agenda items, vendor spending, Juvenile Probation Victim Restitution program, and the final disposition of Improvement District 51 surplus funds. The Division will also prepare the 2024-2025 Countywide Cost Allocation Plan.

For all audits performed, reports have been issued, and copies have been filed with the County Clerk of the Board.

### **Redevelopment Dissolution**

The Auditor-Controller is charged with the accounting functions related to redevelopment dissolutions, which include redevelopment tax revenue, associated pass-through payments, and allocation of residual monies to affected taxing entities. Additionally, State law requires a Countywide Redevelopment Oversight Board to be staffed by the Auditor-Controller. This Oversight Board generally holds its annual meeting each January.

### **County Accounting and Personnel System**

The ACO is a significant participant in upgrading and maintaining the County Accounting and Personnel System (CAPS), the core automated administrative system. Initially implemented in 2003-2004, CAPS was upgraded during late fiscal year 2022-2023 to bring the system current version. In partnership with Information Systems Division and the County Administrator's Office, further evaluation of additional CAPS functionalities/modules to enhance internal controls, productivity, and efficiencies in all County departments will continue in 2023-2024.

# 1010800000—Auditor-Controller

## General Government

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Treasury Deposit Receipts</b>	14,676	14,311	13,817	14,000	14,300
<b>Disbursements</b>					
<i>Checks Handled</i>	148,941	138,657	142,463	135,000	140,000
<i>Direct Deposits</i>	193,965	193,856	192,677	190,000	193,000
<i>Purchase Orders &amp; Claims</i>	144,528	152,333	143,649	150,000	152,000
<i>1099s Issued</i>	1,399	1,460	2,827*	1,470	1,500
<b>Journal Entries</b>	24,712	26,494	25,678	25,500	26,500
<b>Property Taxes</b>					
<i>Changes to Tax Roll</i>	10,231	13,161	13,736	22,257**	15,100
<i>Auditor's Tax Refunds</i>	3,050	3,310	4,026	3,144	3,200
<i>Tax Redemptions</i>	479	374	674	336	350
<i>Supplemental Billings</i>	22,948	29,378	28,243	28,329	28,400
<b>Internal Audit Engagements/Projects</b>	20	31	35	35	35

\*Includes 1,405 one-time distributions of Cares Act funds to outside entities.

\*\*Includes 7,200 one-time mass roll corrections.

# 1010804000—Operating Transfers

## General Government

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$50,600,000	\$0	\$0	\$0	\$0
Services & Supplies	48,650	250,000	150,000	150,000	(100,000)
Operating Transfers Out	126,012,649	90,952,056	139,116,724	139,116,724	48,164,668
Total Appropriations	\$176,661,299	\$91,202,056	\$139,266,724	\$139,266,724	\$48,064,668
<b>Earned Revenues By Source</b>					
Operating Transfers In	\$13,267,500	\$0	\$0	\$0	\$0
Total Revenues	\$13,267,500	\$0	\$0	\$0	\$0
Net County Cost	\$163,393,799	\$91,202,056	\$139,266,724	\$139,266,724	\$48,064,668

## Purpose

This appropriation provides General Fund monies to be transferred to other funds and received as revenue transfers from other funds to the General Fund.

## Major Budget Changes

### Services & Supplies

- (\$100,000) Decrease in professional services for cleanup of waterways.

### Operating Transfers Out

- \$40,000,000 Increase in operating transfers out to the Approved Labor Agreements Reserve for future labor costs.
- \$40,000,000 Increase in operating transfers out to the County Systems Automation Reserve for future costs related to the Enterprise Resource Planning system.
- \$17,691,898 Increase in operating transfers out to the Contingency Reserve.
- \$4,090,000 Increase in operating transfers out to the County Systems Automation Reserve for future technology projects.
- \$3,360,000 Increase in operating transfers out to Information Systems Division and Telephone budgets for technology projects included as supplemental requests.

- (\$28,400,000) Decrease in operating transfers out to the Unfunded Pension Reserve, from \$45.0 million in 2022-2023 to \$16.6 million in 2023-2024.
- (\$28,400,000) Decrease in operating transfers out to the Capital Outlay Fund, from \$45.0 million in 2022-2023 to \$16.6 million in 2023-2024.
- (\$190,000) Decrease in operating transfers out to Whole Person Care to purchase vehicles for homeless outreach and engagement in 2022-2023.

## Program Discussion

The 2023-2024 recommended budget for Operating Transfers totals \$139,266,724, which is an increase of \$48,064,668 from the 2022-2023 adjusted budget. The State Controller requires that transfers between funds of end-of-the-year balances be done by appropriating the funds in the next fiscal year and transferring them to the receiving fund where they are recorded as revenues. Operating Transfers are reflected in the budget for 2023-2024 as follows:

- **Airport Enterprise Fund** – \$639,826 will be provided as a loan to support Airport (#9230901000)

# 1010804000—Operating Transfers

## General Government

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operations, which is not covered by its operating revenues and available fund balance.

- **Approved Labor Agreements Reserve** – \$40,000,000 will be transferred to the Approved Labor Agreements Reserve (#10015) for future labor costs. Total estimated costs are nearly \$80.0 million for 2024-2025 and 2025-2026, when most labor agreements expire.
- **Capital Outlay Fund** – \$16,600,000 will be transferred to the Capital Outlay Fund (#37004) as unprogrammed funds to be used for various capital projects.
- **Contingency Reserve** – \$17,691,898 will be transferred to bring the Contingency Reserve (#10011) to the recommended level of \$129,565,129 for 2023-2024, which represents 5.0% of the total 2023-2024 recommended budget appropriations.
- **County Systems Automation Reserve** – \$44,090,000 will be transferred to the County Systems Automation Reserve (#10130) for future implementation and support costs of the Enterprise Resource Planning (ERP) system (\$40,000,000) and future technology projects, such as network switch

replacements, disaster recovery infrastructure upgrade, Adult Probation system replacement, and firewall refresh (\$4,090,000). Total estimated costs for the ERP system are in excess of \$100.0 million over 15 years.

- **Economic Development Reserve** – \$135,000 will be transferred to the Economic Development Reserve (#10014) reflecting the estimated non-programmed Transient Occupancy Tax revenue for 2023-2024 to bring the Reserve balance to approximately \$3.1 million.
- **Information Systems Division Budgets** – \$2,400,000 will be transferred to Information Systems Division budget (#8240000000) and \$960,000 to Telephone budget (#8260000000), to fund technology projects included in the Division's supplemental requests.
- **Unfunded Pension Reserve** – \$16,600,000 will be transferred to the Unfunded Pension Reserve (#10013) for future pension liability payments.

The recommended budget also appropriates \$150,000 to reimburse Public Works for non-Road Fund related projects or program costs.

# 1010805000—Tobacco Settlement

## General Government

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Operating Transfers Out</i>	\$6,700,000	\$7,300,000	\$7,300,000	\$7,300,000	\$0
<i>Total Appropriations</i>	\$6,700,000	\$7,300,000	\$7,300,000	\$7,300,000	\$0
<b>Earned Revenues By Source</b>					
<i>Operating Transfers In</i>	\$8,378,984	\$7,300,000	\$7,300,000	\$7,300,000	\$0
<i>Total Revenues</i>	\$8,378,984	\$7,300,000	\$7,300,000	\$7,300,000	\$0
<b>Net County Cost</b>	(\$1,678,984)	\$0	\$0	\$0	\$0

## Purpose

This appropriation provides the annual allocation of local Tobacco Settlement Funds based on the policy guidelines established by the Board of Supervisors.

In November 1998, a national tobacco industry settlement was reached. The California portion of the settlement allows counties to share in the settlement and specifies that the dollars are discretionary for counties. The State and counties recognize that there are uncertainties surrounding the level of funds to be received over time.

## Program Discussion

In November 1999, the Board adopted the Tobacco Settlement Policy Guidelines and a general funding formula for a ten-year time frame that ended in 2007-2008. However, due to substantial budget shortfalls, most of the Tobacco Settlement Funds were directed to support County operations for 2008-2009 through 2010-2011.

In October 2010, the Board reaffirmed the Policy Guidelines (B-10-964) and modified the allocation funding formula to reflect the Board's priorities. These Policy Guidelines and the modified allocation formula are summarized as follows:

- Restrict Tobacco Settlement Trust Fund monies to one-time uses with multiyear benefits, not operational program expansions and staffing.
- Maximize the use of non-County funding resources to meet community needs, while avoiding building up service levels that cannot be supported with ongoing revenues.
- Minimize debt financing costs requiring ongoing support.

- Adopt a general allocation formula as follows for a 10-year time frame, effective 2011-2012 through 2020-2021 with a comprehensive review and recommendation for another ten-year allocation when the time frame expires.

During 2020-2021, a review was completed and it was determined that the Policy Guidelines and allocation formula set by the Board in October 2010 were still appropriate. During the 2021-2022 final budget hearing process, the Board approved (R-21-93) the Policy Guidelines and allocation formula for another 10-year period (2021-2022 through 2030-2031).

The 2022-2023 Tobacco Settlement budget totaled \$7.3 million; however, the actual Tobacco Settlement payment received in late April 2023 for 2022-2023 totaled \$7,601,804, an increase of \$301,804. For 2023-2024, receipts from the Tobacco Settlement program are expected to remain at \$7.3 million.

### Funding Allocation

Based on the Board-adopted guidelines, the funding allocation to four identified areas and the specific recommendations and project descriptions are as follows:

# 1010805000—Tobacco Settlement

## General Government

2023-2024 Funding Allocation One-Time Uses/Multiyear Benefits		
Identified Area	Percentage	Allocation
Health Care Facilities	50%	\$3,650,000
Capital Improvement Program	20%	1,460,000
Automation Replacement/Expansion	20%	1,460,000
Public Works - Non-Road Fund Services & Delta/Water-Related Activities	10%	730,000
<b>Total</b>	<b>100%</b>	<b>\$7,300,000</b>

### Health Care Facilities - \$3,650,000

- Since 2010, capital funds have been accumulated for facility projects to address the changing health care environment. The Public Health Facility Replacement project is an example of the type of one-time utilization for which Tobacco Settlement funds have been allocated. The construction project completed in 2022-2023 was partially funded with approximately \$20.0 million in Tobacco Settlement funds designated for Health Care facilities. In 2022-2023, approximately \$4.2 million was used to augment grant funding for the Behavioral Health Services Adult Residential Treatment Modular Campus construction project to provide adult mental health treatment services within a licensed social rehabilitation facility. Anticipated future project-specific funding recommendations will be scheduled for Board consideration at the next stage of project development.

The recommended budget allocates \$3,650,000 of the 2023-2024 Tobacco Settlement funds for health care facilities projects. This amount will bring the total funding available for future Health Care facilities projects to approximately \$29.6 million. By assembling funding now, potential future debt financing costs are minimized.

See Public Improvement budget (#1040148000) for additional details.

### Capital Improvement Program - \$1,460,000

- **\$1,085,000** – Sheriff's Office Jail Digital HVAC Controls Replacement project.
- **\$375,000** – Honor Farm Restroom Enlargement project.

See Public Improvement budget (#1040148000) for additional details.

### Automation Replacement/Expansion - \$1,460,000

- **\$500,000** – Business Intelligence and Enterprise Data Management.
- **\$260,000** – Infrastructure Upgrades.
- **\$250,000** – Enhancements/Upgrades to Cybersecurity Systems.
- **\$250,000** – Robotic Process Automation.
- **\$200,000** – Digital Services Strategic Planning.

See Information Systems Division Internal Service Fund budget (#8240000000) and Telephone Internal Service Fund budget (#8260000000) for additional details.

### Public Works - \$730,000

- **\$730,000** – To supplement the General Fund support of the advocacy efforts and activities related to the Delta and the County's water rights.

See Delta Activities budget (#2023070000) for additional details.

## Fund Balance

### Tobacco Settlement Trust Fund

The Tobacco Settlement General Fund Special Account (#10116) fund balance as of March 31, 2023 is \$1,569,233. Including the excess revenue from 2021-2022, the projected balance as of June 30, 2023 is approximately \$3.6 million.



# 1011000000—Treasurer-Tax Collector

## General Government

Phonxay Keokham, *Treasurer-Tax Collector*  
[www.sjgov.org/departments/ttc](http://www.sjgov.org/departments/ttc)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,176,031	\$4,473,134	\$4,933,227	\$4,933,227	\$460,093
Services & Supplies	711,031	1,185,711	1,259,100	1,259,100	73,389
Centrally-Budgeted Expenses	2,857,887	2,884,862	2,212,141	2,212,141	(672,721)
Operating Transfers Out	230,000	230,000	260,000	260,000	30,000
Total Expenditures	\$7,974,949	\$8,773,707	\$8,664,468	\$8,664,468	(\$109,239)
Expenditure Reimbursements	(799,022)	(751,792)	(701,792)	(701,792)	50,000
Total Appropriations	\$7,175,927	\$8,021,915	\$7,962,676	\$7,962,676	(\$59,239)
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$201,035	\$200,000	\$195,000	\$195,000	(\$5,000)
Fines/Forfeitures/Penalties	194,885	300,000	280,000	280,000	(20,000)
Interest/Rents	455,257	400,000	400,000	400,000	0
Aid From Other Governments	8,671	20,000	5,000	5,000	(15,000)
Charges For Services	2,576,979	2,363,700	2,651,089	2,651,089	287,389
Miscellaneous Revenues	54,127	78,500	80,500	80,500	2,000
Operating Transfers In	0	50,000	0	0	(50,000)
Total Revenues	\$3,490,954	\$3,412,200	\$3,611,589	\$3,611,589	\$199,389
<b>Net County Cost</b>	\$3,684,973	\$4,609,715	\$4,351,087	\$4,351,087	(\$258,628)
<b>Allocated Positions</b>	41.0	40.0	40.0	40.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	0.7	0.7	0.7	0.7	0.0
<b>Total Staffing</b>	41.7	40.7	40.7	40.7	0.0

## Purpose

This narrative includes the following budgets:

- 1011000000 Treasurer-Tax Collector (TTC)
- 1011600000 Revenue and Recovery Division (RRD)

Functions of the TTC are mandated, while service levels are discretionary. Duties of the TTC include the safekeeping and investing of funds for the County and other public entities and the collection and processing of property tax payments. The investments generate interest earnings for the County and the agencies depositing funds with the Treasury. These earnings, along with the collection of property taxes, provide a major source of General Purpose Revenue and support vital local government services for the residents and taxpayers of San Joaquin County.

The RRD collects debts owed to the County and takes appropriate legal action to secure such debts. Its services are not mandated.

# 1011000000—Treasurer-Tax Collector

## General Government

### Board Strategic Priorities 2022-2023 through 2024-2025

The TTC's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Augment Digitization and Automation	Current	Target	Deadline
➤ Modernize mail communication with taxpayers	Legacy FileMaker Pro database	Laserfiche database with Megabyte Property Tax System connectivity	June 2025
➤ Increase social media outreach to promote online payments and reduce delinquencies	2 Accounts	3 Accounts 4 Accounts 5 Accounts	June 2023 June 2024 June 2025
Fiscal Optimization	Current	Target	Deadline
➤ Increase online property tax payments to reduce costs and improve services	21%	22% 23% 24%	June 2023 June 2024 June 2025
➤ Reduce parcels with disqualifying conditions for tax sale	70 Parcels	60 Parcels 45 Parcels 30 Parcels	June 2023 June 2024 June 2025

### Major Budget Changes

#### Salaries & Employee Benefits

- \$377,432 Salary and benefits adjustments.
- \$169,060 Add a Department Information Systems Analyst III.
- (\$86,399) Delete a vacant Senior Collections Clerk.

#### Services & Supplies

- \$25,000 Increase in professional services for counsel.
- \$25,000 Increase in office supply costs.

#### Centrally-Budgeted Expenses

- \$120,312 Increase in data processing charges.

- \$14,433 Increase in Casualty insurance costs.
- (\$34,183) Decrease in Workers' Compensation insurance costs.
- (\$782,377) Cost Allocation Plan adjustment.

#### Operating Transfers Out

- \$30,000 Increase in operating transfers out to the Equipment Maintenance Fund (#10330).

#### Expenditure Reimbursements

- (\$50,000) Decrease in charges to San Joaquin General Hospital.

#### Revenues

- \$181,662 Increase in property tax administration fees.

# 1011000000—Treasurer-Tax Collector

## General Government

- \$112,927 Increase in Treasury investment service fees.
- \$25,000 Increase in unsecured property tax collection fees.
- (\$35,000) Decrease in collection of fees for the Probation Department.
- (\$20,000) Decrease in penalties on delinquent taxes.

### Operating Transfers In

- (\$50,000) Decrease in operating transfers due to tax payment kiosk purchased in the previous year.

## Program Discussion

The 2023-2024 recommended budget for the Treasurer-Tax Collector (TTC) totals \$8,664,468, a decrease of \$109,239 from the 2022-2023 adjusted budget.

### Treasury Division

State law requires that all funds of the County, school districts, and certain special districts be held by the TTC. The Treasury Division performs the County's treasury functions, including investing all funds within the County investment pool and managing banking services for the entities above. The funds on deposit are predominantly derived from local government revenues consisting of property taxes, State and Federal funding, and other fees.

### Investment Strategy

In 2022-2023, the TTC managed liquidity and risk effectively to meet short-term cash needs. With the Federal Open Market Committee increasing rates seven times in 2022 and additional rate increases expected for 2023, the TTC has incorporated longer-term securities into the portfolio, resulting in improved earnings for pool participants. The TTC will monitor market conditions and adjust its strategy accordingly. The TTC continues to prioritize safety and liquidity concerning the investment portfolio.

### Investment Pool

During 2022-2023, the average daily balance of the investment pool was approximately \$5.2 billion, an increase of \$800 million from 2021-2022. Investment earnings of approximately \$125 million are expected to be apportioned to all participating entities in 2022-2023. This represents an estimated increase of \$106.3 million from the \$18.7 million

apportioned in 2021-2022. The increase is mainly due to the rising interest rate environment.

In July 2023, the Health Plan of San Joaquin (HPSJ) is expected to discontinue using County financial services such as accounting and treasury. As a result, funds belonging to HPSJ will be transferred to its treasurer for financial management. Although the investment pool is expected to decrease, the transfer will not have a material impact on the investment pool.

### Cybersecurity Awareness

In 2022-2023, TTC staff continued to thwart attempts to defraud the County, preventing taxpayer funds' loss. In February 2023, the Department held cybersecurity training for its financial partners, including County departments, special districts, and school districts. This training promoted cybersecurity awareness and best practices to prevent cyberattacks.

### Tax Division

The Tax Division is responsible for billing and collecting property tax, Transient Occupancy Tax (TOT), and business license fees. In 2021-2022, approximately 300,000 secured, unsecured, and supplemental property tax bills, representing approximately \$1.4 billion in charges, were mailed and processed; and approximately \$1.3 billion was collected and processed for the County, schools, special districts, and cities. Approximately \$1.0 million in TOT and \$175,000 in business license fees were collected.

### Tax Division Chief

In 2018-2019, the TTC requested a Chief Deputy to oversee the Tax Division. A Management Analyst III was added in 2019-2020. In 2022-2023, a reclassification study was completed to reclassify the Management Analyst III to a Chief Deputy Treasurer-Tax Collector. The position has allowed the Department to complete modernization projects, improve collections, enhance succession planning, and assist the Department with its strategic goals.

### Property Tax Outreach Efforts

In 2022-2023, the TTC distributed a property tax information brochure to all property owners to educate taxpayers about the billing process and how to avoid common issues when paying property taxes. The TTC also began posting public announcements on the Nextdoor neighborhood social media platform and increasing targeted mailing campaigns. These efforts resulted in increased public interactions and awareness. In 2023-2024, the TTC will continue to expand on methods of informing constituents and property owners by engaging additional media outlets and community newspapers Countywide. These efforts will inform the public

# 1011000000—Treasurer-Tax Collector

## General Government

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about the Department's services, such as online tax notification, billing, and payment options. Outreach will continue to expand with additional social media channels.

### *Property Tax Assistance*

In June 2022, California Housing Finance Agency (CalHFA) launched a new property tax assistance program to help homeowners who fell behind on their property taxes due to financial hardship they experienced during the COVID-19 pandemic. The TTC promoted the program to San Joaquin County homeowners, and as of March 2023, nearly 400 qualified homeowners received assistance with nearly \$8.5 million in CalHFA grants. As this program expands, the TTC will continue to help distressed San Joaquin County homeowners benefit from available relief.

### *Electronic Payments*

The Tax Division will continue to promote the use of electronic payments by highlighting the benefits on the TTC's website, tax bills, social media content, email communications, and in the Office. The Tax Division will also continue to enhance its online services to reduce costs and efficiently deliver vital information.

### *Sealed Bid Tax Auction*

The TTC held a sealed bid tax auction for tax-defaulted properties that are not eligible for sale at a public tax sale due to lack of access or disqualifying conditions. These tax sales aim to return tax-defaulted properties to a tax-generating status.

In 2023-2024, the Tax Division intends to pursue the following:

- **Cash Payment Kiosk** – After years of research and discussion, the TTC has received approval from its property tax system vendor to develop a kiosk to accept cash payments. The TTC identified a low-cost solution and projects to have a cash payment kiosk available to the public in 2023-2024.
- **Lockbox** – The TTC selected a lockbox vendor in 2022. A lockbox service receives and processes payments on behalf of TTC and would allow TTC staff to perform other essential duties. The lockbox vendor is refining its service, and a trial is scheduled for 2023.
- **Business License Automation** – In 2020-2021, the TTC began evaluating new software to automate its business license process. After discussion with other County departments, it was determined that a Countywide solution would be more advantageous to businesses, taxpayers, and the County. The TTC has

collaborated with various County departments in evaluating Countywide permitting and business licensing proposals. In 2021-2022, Accela was selected and approved. The Countywide solution is expected to streamline the process to obtain and renew business licenses while allowing the public to verify the validity of a business's license. This project is expected to be completed in 2023-2024.

- **TOT Enhancement Project** – In 2018, the TTC initiated a TOT Enhancement Project. This resulted in a Voluntary Collections Agreement (VCA) with Airbnb generating approximately \$140,000 in TOT annually. In 2022-2023, an agreement with Deckard Technologies was approved to identify compliance with short-term rentals. In addition, the TTC is working with Accela for online registration, payment, and licensing. These enhancements are expected to increase and streamline collections.
- **Document Content Management System Modernization** – The TTC is actively working to replace an obsolete letter generation and storage system with the County's Laserfiche enterprise content management system. Once implemented, document images would be accessible directly from the property tax system, improving customer service and reducing the cost associated with paper documents. The project is scheduled to be completed in 2023-2024.

## Revenue & Recovery Division

The Revenue and Recovery Division (RRD) is the designated collection agency for the County and is responsible for managing and collecting outstanding fees due to County departments. Approximately 95% of the RRD's referrals are from San Joaquin General Hospital (SJGH) and the Probation Department.

In 2021-2022, assignments decreased to \$44.2 million from \$54.1 million in the prior year due to issues with preparing and transferring debts to the RRD. Additionally, legislation changes canceled Probation fees.

Collections increased to \$5.5 million in 2021-2022 compared to \$4.7 million in 2020-2021 due to the return of RRD staffing and the resumption of State income tax refund intercepts.

### *Collection System Replacement*

The RRD debt collection system is nearly obsolete and may no longer be supported. In 2022-2023, the RRD collaborated with the Information Systems Division (ISD) to evaluate and select a replacement system. A new debt collection system is anticipated to be implemented in 2023-2024.

# 1011000000—Treasurer-Tax Collector

## General Government

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### *Outside Collection Agency*

The RRD is pursuing a replacement collection service agreement with an outside agency in 2022-2023. Debt requiring significant collection resources is referred to as an outside collection agency. Much like RRD employees, external collection agency employees must follow the Fair Debt Collection Practices Act's provisions, be courteous, and respect the debtor's rights.

### *San Joaquin General Hospital*

In 2021-2022, the RRD received over \$600,000 in revenue from SJGH for its collection services on delinquent medical bills. In 2021-2022, assignments from SJGH decreased to \$36.9 million from \$53.3 million in the prior year. In 2021-2022, collections totaled \$2.1 million compared to \$2.2 million in 2020-2021. Collections are estimated to be \$2.3 million for 2022-2023 and increase to \$2.4 million for 2023-2024.

### *Probation Department*

The RRD collects probation fines, supervision fees, probation pre-sentence report fees, processing fees, and restitution accounts. In 2021-2022, the RRD received approximately \$240,000 in revenue from the Probation Department for collection services. Total collections in 2021-2022 were approximately \$670,000, slightly decreasing from the \$675,000 collected in 2020-2021.

In September 2020, Assembly Bill (AB) 1869 was signed into law. AB 1869 eliminates many administrative fees in the criminal justice system, effective July 1, 2021. Additionally, in November 2021, AB 177 was signed into law and further eliminated fees and outstanding debt. These administrative fees related to legal representation, probation, and incarceration are charged to defendants, probationers, or arrestees. Probation fines and restitution were not affected. In 2022-2023, the RRD worked with the Probation Department to identify and cancel fees pursuant to AB 1869 and AB 177. The Division discharged associated debts, returned affected payments, and issued satisfaction of judgment. Total fees canceled amounted to \$1.6 million. Probation account referrals and collections have significantly decreased due to both laws. Assignments decreased to \$1.9 million in 2021-2022 from \$4.6 million in 2020-2021.

RRD collection revenue is based on collection activity performed. The decline in assignments of Probation fees will result in a corresponding decrease in Probation collection revenue. To offset the anticipated reduction in revenue, the 2022-2023 recommended budget includes the deletion of a vacant Senior Collections Clerk. The RRD will continue to analyze the impacts of AB 1869 and AB 177 and may return to the Board of Supervisors for a midyear budget adjustment, if necessary.

## Fund Balance

### Equipment Maintenance Fund

As of March 31, 2023, the TTC Equipment Maintenance General Fund Special Account (#10330) had a balance of \$2,776,426. The funds are derived from delinquent fee charges transferred from the TTC budget and are set aside for future replacement costs of equipment and systems.

### Unclaimed Tax Refund Fund

As of March 31, 2023, the Unclaimed Tax Refund Trust Fund (#81110) had a balance of \$78,595. The fund is a clearing account for unclaimed and outlawed property tax refund warrants.

### TTC Tax Collection Cash Overage Fund

As of March 31, 2023, the TTC Tax Collection Cash Overage Trust Fund (#81235) had a balance of \$24,702. The fund is used to offset property tax payment differences.

## Supplemental Request

The TTC is requesting supplemental funding totaling \$169,060 for the following:

### Department Information Systems Analyst III (DISA III)

Funding of \$169,060 is requested to add a DISA III. The additional DISA III will enhance public service by providing departmental information technology administration and project management.

The recommended budget has been augmented to address this request.

# 1011000000—Treasurer-Tax Collector

## General Government

	Workload Data			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	Actual— 2020-2021	2021-2022		
<b>Treasury Division</b>					
<i>Investment Pool-Daily Avg.</i>	\$3.4 billion	\$4.0 billion	\$4.7 billion	\$5.2 billion	\$4.5 billion
<i>Investment Earnings</i>	\$60,030,710	\$21,068,465	\$18,677,740	\$125,000,000	\$150,000,000
<b>Property Tax Division</b>					
<i>Total Tax Charge</i>	\$1.2 billion	\$1.3 billion	\$1.4 billion	\$1.5 billion	\$1.5 billion
<i>Total Tax Collected</i>	\$1.1 billion	\$1.2 billion	\$1.3 billion	\$1.4 billion	\$1.4 billion
<i>Property Tax Bills Produced</i>	280,222	289,244	278,712	295,000	300,000
<i>Delinquent Notices</i>	21,376	24,477	27,819	32,000	33,000
<i>Property Tax Defaulted</i>	16,318	17,179	16,281	16,500	16,700
<i>Properties</i>					
<i>Approved-Auction</i>	153	127	75	10	110
<i>Redeemed/Removed</i>	87	93	54	2	50
<i>Sold</i>	53	32	15	1	40
<i>Tax Proceeds from the Auction</i>	\$2,142,857	\$3,199,015	\$985,000	\$50,000	\$2,000,000
<i>Business Licenses Issued</i>	1,888	2,027	1,963	2,050	2,100
<b>Revenue &amp; Recovery Division</b>					
<i>Referrals Processed</i>	23,663	12,349	15,463	16,000	16,500
<i>Statements Mailed</i>	120,800	103,003	91,924	73,000	75,000
<i>Dollars Collected</i>	\$5,734,341	\$4,671,229	\$5,485,039	\$4,800,000	\$4,900,000

# Summary

## All Assessor-Recorder Budgets

Steve J. Bestolarides, Assessor-Recorder-County Clerk  
[www.sjgov.org/department/assessor](http://www.sjgov.org/department/assessor)

	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$11,803,014	\$13,188,410	\$14,616,269	\$14,616,269	\$1,427,859
Services & Supplies	3,355,259	3,641,224	3,501,486	3,501,486	(139,738)
Centrally-Budgeted Expenses	2,639,373	3,077,263	3,021,742	3,021,742	(55,521)
Other Charges & Uses	5,287	5,600	8,000	8,000	2,400
Operating Transfers Out	60,000	1,097,900	1,700,485	1,700,485	602,585
Total Expenditures	\$17,862,933	\$21,010,397	\$22,847,982	\$22,847,982	\$1,837,585
Expenditure Reimbursements	(424,088)	(286,200)	(373,589)	(373,589)	(87,389)
Total Appropriations	\$17,438,845	\$20,724,197	\$22,474,393	\$22,474,393	\$1,750,196
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$3,758	\$2,940	\$3,129	\$3,129	\$189
Interest/Rents	25,928	75,000	70,000	70,000	(5,000)
Charges For Services	8,434,386	7,921,866	6,929,489	6,929,489	(992,377)
Miscellaneous Revenues	123,743	5,250	3,892	3,892	(1,358)
Operating Transfers In	0	1,412,100	1,889,432	1,889,432	477,332
Total Revenues	\$8,587,815	\$9,417,156	\$8,895,942	\$8,895,942	(\$521,214)
<b>Net County Cost</b>	\$8,851,030	\$11,307,041	\$13,578,451	\$13,578,451	\$2,271,410
<b>Allocated Positions</b>	112.0	112.0	115.0	115.0	3.0
<b>Temporary (Full-Time Equivalent)</b>	1.6	1.3	1.6	1.6	0.3
<b>Total Staffing</b>	113.6	113.3	116.6	116.6	3.3

## Purpose

Functions of the Assessor-Recorder-County Clerk are mandated, while service levels are discretionary.

The Assessor is dedicated to preparing fair and equitable assessments for all taxable property in San Joaquin County. The Office has a constitutional responsibility to determine the value of and assess all taxable property in the County.

The Recorder-County Clerk maintains public records, records documents, and files notary public bonds. The Recorder-County Clerk issues and registers marriage licenses, vital statistics, and other public documents. Additionally, the Recorder-County Clerk receives passport applications on behalf of the U.S. Department of State.

This is a summary of the budgets administered by the Assessor-Recorder-County Clerk (ARCC). These include:

- 1011100000 Assessor
- 2025900000 Recorder-County Clerk
- 2025901000 Recorder-Equipment/Automation

# Summary

## General Government

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization				
Improve Recruitment and Retention Rates		Current	Target	Deadline
➤ Improve vacancy rate		23%	15%	July 2024
			12%	June 2025
Demonstrate Leadership Development		Current	Target	Deadline
➤ Continue to enroll managers in leadership development training		1 per year	2 per year	July 2023
			3 per year	July 2024
			4 per year	June 2025
Augment Digitization and Automation		Current	Target	Deadline
➤ Fully implement mass valuation programs		50% residential	95% residential	July 2023
		0% commercial	100% commercial	July 2024
		0% rural	100% rural	June 2025
Fiscal Optimization				
Effectively Manage One-Time Funds		Current	Target	Deadline
➤ Participate in the State-approved California Assessors’ Association Joint Powers Agency (JPA) \$30.0 million technology-related funding opportunity	Formed JPA and applied for the first \$10.0 million in funding		\$10.0 million granted	July 2023
			\$20.0 million granted	July 2024
			\$30.0 million granted	June 2025
Economic Development				
Enhance COVID Recovery		Current	Target	Deadline
➤ Secure ARCC satellite office sites to expand public access and serve as alternative worksites in the disaster recovery plan	No satellite office sites		develop plan	July 2023
			1 worksite	July 2024
			2 worksites	June 2025
➤ Develop ARCC geographic information system (GIS) applications and programs to provide timely data management reports	Base parcel fabric layer		workload application	July 2023
			workload layer GIS	July 2024
			dashboard	June 2025



# 1011100000—Assessor-Recorder-County Clerk

## General Government

Steve J. Bestolarides, Assessor-Recorder-County Clerk  
[www.sigov.org/departments/assessor](http://www.sigov.org/departments/assessor)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$11,803,014	\$13,188,410	\$14,616,269	\$14,616,269	\$1,427,859
Services & Supplies	3,159,295	3,071,224	2,936,638	2,936,638	(134,586)
Centrally-Budgeted Expenses	2,632,632	3,070,524	3,015,003	3,015,003	(55,521)
Other Charges & Uses	5,287	5,600	8,000	8,000	2,400
Operating Transfers Out	60,000	60,000	60,000	60,000	0
Total Expenditures	\$17,660,228	\$19,395,758	\$20,635,910	\$20,635,910	\$1,240,152
Expenditure Reimbursements	(424,088)	(286,200)	(373,589)	(373,589)	(87,389)
Total Appropriations	\$17,236,140	\$19,109,558	\$20,262,321	\$20,262,321	\$1,152,763
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$3,758	\$2,940	\$3,129	\$3,129	\$189
Charges For Services	7,173,528	6,843,866	6,208,625	6,208,625	(635,241)
Miscellaneous Revenues	123,743	5,250	3,892	3,892	(1,358)
Operating Transfers In	0	1,409,100	1,882,329	1,882,329	473,229
Total Revenues	\$7,301,029	\$8,261,156	\$8,097,975	\$8,097,975	(\$163,181)
<b>Net County Cost</b>	\$9,935,111	\$10,848,402	\$12,164,346	\$12,164,346	\$1,315,944
<b>Allocated Positions</b>	112.0	112.0	115.0	115.0	3.0
Temporary (Full-Time Equivalent)	1.6	1.3	1.6	1.6	0.3
Total Staffing	113.6	113.3	116.6	116.6	3.3

## Purpose

Functions of the Assessor-Recorder-County Clerk are mandated, while service levels are discretionary. This narrative includes the Assessor (#1011100000) and the Recorder-County Clerk (#2025900000) budgets.

The Assessor produces annual property assessment rolls based on property tax revenue, including real and personal property. The Assessor discovers, values, and enrolls all taxable property in the County. The Office also determines the change in property ownership status and values that property with the difference, monitors the planting/removal of all commercial trees and vines, administers the constitutional exemption on young trees and vines, revalues Williamson Act property annually, makes reductions to Proposition 13 values where appropriate, administers various tax exemption programs, maintains the Countywide ownership data parcel maps, as well as produces and maintains the Geographic Information System (GIS) parcel layer and maps.

Approximately 84% of the local public agencies' General Purpose Revenue comes from property taxes. The Assessor's property tax assessment roll establishes the property tax base for all local government agencies in the County, including cities, public safety, special districts, and school districts. Currently, the County collects approximately \$1.3 billion in taxes for these entities. Maximum revenue is achieved only through an active, fair, and complete assessment program.

The Recorder-County Clerk (RCC) maintains recorded parcel maps, property, birth, marriage, and death records. It also records fictitious business name statements, issues marriage licenses, processes notary bonds, registers process servers, unlawful detainer assistants, professional photocopyers, and processes Department of Fish & Game notices of determination. In June 2021, the RCC also began receiving passport applications on behalf of the U.S. Department of State.

# 1011100000—Assessor-Recorder-County Clerk

## General Government

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$891,698 Salary and benefits adjustments.
- \$182,125 Add a Business Intelligence Administrator.
- \$149,470 Add a Department Information Systems Analyst I-II.
- \$130,519 Add an Associate GIS Analyst.
- \$114,352 Add a GIS Specialist I-II.
- (\$96,701) Delete a vacant Assessors Mapping Technician I-II.
- \$56,396 Increase in extra-help.

#### Services & Supplies

- \$217,729 Increase in consultant fees for GIS, compliance, digitization, and integration of map projects.
- \$63,190 Increase in software and related license fees.
- (\$412,693) Decrease in special services due to the completion of the Kofile digitization project.

#### Centrally-Budgeted Expenses

- \$173,663 Increase in Casualty insurance costs.
- \$18,469 Increase in rents and leases of automation equipment.
- (\$252,692) Cost Allocation Plan adjustment.

#### Expenditure Reimbursements

- \$87,589 Increase in tax administration direct charge.

#### Revenues

- \$246,707 Increase in tax administration revenue.
- (\$875,107) Decrease in recording fee revenue.

### Operating Transfers In

- \$473,229 Increase in operating transfers from General Fund Special Accounts and Special Revenue Funds, primarily due to overhead costs for automation projects.

### Program Discussion

The 2023-2024 recommended budget for the Assessor-Recorder-County Clerk (ARCC) totals \$20,635,910, which is an increase of \$1,240,152 from the 2022-2023 adjusted budget.

The recommended budget includes fund transfers of \$1,640,485 from the Recorder's Modernization Special Revenue Fund (#20037), \$72,765 for the Assessor's Automation General Fund Special Account (#10225) for automation projects and upgrades, administrative support, and services, and \$60,000 from the Recorder's Vital and Health Statistics General Fund Special Account (#12020) to support Public Health Services' effort to maintain and update its vital records database.

The Department's focus is monetary policy, the inflation rate, and the impact they have on housing and real estate in San Joaquin County. Increasing interest rates, softened sales prices, and reduced recordings may adversely impact Countywide assessments. Federal monetary policy to raise rates to combat inflation has correlated to increased mortgage rates that will continue to move sales prices, volume, and inventory. This represents a critical transition point in our local economies.

The ARCC continues to pivot and adjust to legislative mandates from the State that impact the Department directly. Assembly Bill (AB) 1466 authorizes a person who holds an ownership interest in property to record a Restrictive Covenant Modification document that would have racially or otherwise unlawfully restrictive covenant language redacted. Various requirements have been imposed on the Department to create an implementation plan outlining methods by which the Office would identify and redact unlawfully restrictive covenants. The Department's website has been updated to provide information on how a property owner can prepare and record a Restrictive Covenant Modification to comply with the legislation. The Department has a plan, and implementation will commence in 2023-2024.

Proposition 19 allows homeowners over age 55 to keep their lower existing property tax bill when they sell one house and buy another, which has increased administrative duties to transfer property values, as the legislation outlines. Proposition 19 also restricts the ability of parents/children to

# 1011100000—Assessor-Recorder-County Clerk

## General Government

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transfer property to their parents/children by now requiring the recipient live in the home.

2023-2024 ARCC projects include:

- **Passport Services** – In 2020, the RCC worked with the San Francisco Passport Agency to become a passport acceptance facility. The U.S. Department of State - Bureau of Consular Affairs, Passport Services must approve all new acceptance offices, and on February 3, 2021, the RCC received notice of approval. The RCC began accepting passport applications and offering passport photo services in July 2021. In 2021-2022, the Department took 2,329 passport applications. The Department anticipates surpassing 4,500 applications in 2022-2023 and plans to remodel the RCC lobby to accommodate passport services with dedicated counter and office space.
- **GIS Innovations** – In 2019, the ARCC embarked on a three- to five-year plan to fully develop the Assessor's Parcel Layer. When fully implemented, the ARCC will leverage GIS innovations to increase the organization's capabilities. Some key pieces include:
  1. **System of Record** – Using GIS to manage parcels, tax maps, and other layers pertinent to business in the Assessor's Office requires building resources and data points. Creating this foundational piece was completed in May 2021.
  2. **System of Insight** – Being able to bring data together for access and analysis. The System of Record is about the data, and the System of Insight is about the solutions that fully utilize the data. From the most basic, it is a parcel viewer with attributes that can be viewed and clicked to obtain information, perform statistical analysis on neighborhood sales data, and create dashboards that provide values and trends. All of this is possible by using parcel and Megabyte data. These data layers began at the end of 2020-2021.
  3. **System of Engagement** – Getting GIS tools into users' hands and having multiple users contribute to the system. This will allow staff to access data and tools on their laptops or smartphones, collect data in the field for upload to a central geodatabase, and import data into the GIS. It is anticipated that mobile devices will be utilized by December 2023.

The Department achieved its initial GIS strategic plan and is scheduled to complete an updated plan in 2023-2024.

- **Preservation/Digitization of Historical Volumes and Maps** – Historical documents and maps are currently in their original form, and their safety may be at risk. Digitization of these documents continues to be necessary, and their preservation is essential. Over 300 volumes of historical County documents and 17,000 maps dating back to the 1850s are in the County Historical Society Museum at Micke Grove Park. In 2021-2022, the Board approved one-time supplemental funding of \$1.9 million for digitizing, preserving, and indexing these historical documents.

The project, which was completed in June 2022, included:

1. **Preservation** – dismantling volumes, mending, and re-binding.
2. **Archival Imaging** – image capture, processing, and enhancement.
3. **Creation of Archival Microfilm** – to serve as a disaster recovery security backup.
4. **Indexing** – to capture metadata to allow customers to search by keywords.

The Department began indexing the digital versions at the end of 2022-2023. When completed in 2023, an online search mechanism will allow residents to find archives on the Department website easily.

- **Space Planning** – In collaboration with the General Services Department, the ARCC has been working with an architect to complete space planning of the Department's second-floor footprint. This first remodeling phase focuses on developing a plan where the Department's IS/Mapping/GIS team can work more collaboratively and create a dedicated counter for passport services. Planning has been completed, and construction is anticipated to begin in 2023-2024.
- **Digitization and Integration of Maps** – The Department plans to digitize and name by book, volume, and page maps for seamless integration into the RCC's Tyler Eagle system.

**Satellite Offices** – In 2021-2022, the ARCC initiated discussions with jurisdictions in the County to evaluate the desire for ARCC satellite offices to make services more accessible and easier for the public to conduct business. Many citizens have provided feedback on the inconvenience of coming to the current centralized model that requires travel to downtown Stockton to obtain and deliver essential documents, citing parking difficulties and lack of personal time to travel to the offices. These satellite offices may also serve as alternative worksites in the

# 1011100000—Assessor-Recorder-County Clerk

## General Government

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County's disaster recovery plan. The Department intends to provide complete satellite services in the first quarter of 2023-2024.

### Fund Balance

#### Assessor's Automation Fund

As of March 31, 2023, the Assessor's Automation General Fund Special Account (#10225) had a balance of \$668,958. The fund is used for automation projects, automation upgrades, administrative support, and services.

#### Recorder's Vital & Health Statistics Fund

As of March 31, 2023, the Recorder's Vital and Health Statistics General Fund Special Account (#12020) had a balance of \$523,398. The fund is used to support Public Health Services' effort to maintain and update its vital records database.

### Supplemental Requests

The ARCC is requesting supplemental funding totaling \$479,765 for the following:

#### *Business Intelligence Administrator*

Funding of \$182,125 is requested to add a Business Intelligence Administrator. On February 8, 2023, the San Joaquin County Civil Service Commission adopted the classification specification for Business Intelligence Administrator. This classification was created at the request of the ARCC for a position to develop, implement, and manage strategic organizational initiatives and operational business models to improve public services. The position will be responsible for a combination of technical, administrative, and business development tasks and assist executive management in manifesting strategic organizational initiatives and operational business models.

#### *Department Information Systems Analyst I-II*

Funding of \$149,470 is requested to add a Department Information Systems Analyst I-II. The ARCC strategic organizational vision presented to the Board during the 2019-2020 budget hearing spoke of the Department's ongoing commitment to investing in technology and innovation. The ARCC has multiple constant innovation projects designed to provide better services to the public, improve productivity and efficiency, and enhance employee development. The proposed addition of a Department Information Systems Analyst I-II position would assist in achieving these objectives.

This position would be allocated to the Recorder-County Clerk's budget (#2025900000) and would focus on RCC

technology projects and systems support. Since 2019, the Department has relied on consultants for RCC project management and support. The ARCC requests this position to reduce reliance on consultants for essential departmental functions. This is consistent with the previous information systems resources provided to the Department before 2019, in addition to increasing administrative duties and additional workload imposed by new legislative mandates.

#### *Associate GIS Analyst & GIS Specialist (I-II)*

As the Department reached completion of its original GIS strategic plan, in addition to general mapping duties, the ARCC's current mapping technicians provided essential GIS support to its Principal GIS Analyst.

Funding of \$148,170 is requested to add a GIS Specialist I-II (\$114,352), add an Associate GIS Analyst (\$130,519), and delete a vacant Assessor's Mapping Tech I-II (\$96,701). These positions would aid in aligning mapping technician and GIS position responsibilities, alleviate overlapping duties, and help achieve overall success for the growing GIS program. A capable GIS unit continues to benefit operational efficiency and optimize the use of departmental GIS databases.

The GIS Specialist I-II position would focus on routine tasks relating to the upkeep and maintenance of the Department's GIS mapping data, testing proposed changes to the GIS database, and reviewing existing GIS parcel fabric editing procedures. The GIS Specialist I-II would be responsible for troubleshooting GIS data and software, initial contact for internal data correction requests, new web application support, dashboard support, and questions regarding newly developed GIS tools.

The Associate GIS Analyst position would report directly to the Department's Principal GIS Analyst. Primary duties would include assisting in the execution of regular quality assurance tasks for the department GIS database, producing reports utilizing ARCC GIS data, and training internal staff in using new web applications and GIS-based tools. In addition, this position would assist with department-specific special projects, such as gathering and capturing data for department-wide data-driven decision-making, participating in ARCC's mass appraisal workflows, developing mobile applications, and creating valuation and production dashboards. The Associate GIS Analyst would lead in growing practices and procedures to develop more efficient data capture practices for the GIS Specialist role. If approved, one Assessor's Mapping Tech I-II position would be deleted from the Assessor's budget (#1011100000).

The recommended budget has been augmented by \$479,765 to address these requests, including \$183,288 added by Board of Supervisors' direction during the Final Budget Hearing.

# 1011100000—Assessor-Recorder-County Clerk

## General Government

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Property Tax Roll (in Thousands)</b>					
Secured	\$74,946,527	\$80,575,401	\$86,186,211	\$93,981,895	\$98,930,545
Unsecured	4,165,809	4,381,167	4,487,819	5,196,596	5,206,871
<b>Total Roll Values</b>	<b>\$79,112,336</b>	<b>\$84,956,568</b>	<b>90,674,030</b>	<b>\$99,178,491</b>	<b>\$104,137,416</b>
<b>Assessor's Operations</b>					
Appeals Filed	421	440	523	496	500
Audits-Mandatory	116	131	155	180	179
Boats and Aircraft	6,366	6,432	6,922	7,495	7,400
Exemptions Processed	90,547	91,067	90,431	88,933	85,000
New Subdivision Lots	3,330	3,278	1,776	5,375	3,700
Property Statements	10,288	10,299	11,260	12,561	12,000
Property Transfers	32,319	32,624	42,168	33,244	32,000
Proposition 8 Reviews	13,287	12,045	9,712	4,651	6,000
Permits Received	23,937	24,941	26,991	25,862	25,000
<b>Recorder's Operations</b>					
Documents Recorded	189,559	220,207	216,036	120,000	120,000
Pages Recorded	950,790	1,202,687	1,096,118	560,000	560,000
Marriage Licenses Issued	2,941	4,449	3,581	3,200	3,000
Vital Statistics	28,821	32,342	33,084	31,000	30,000
Passport Applications	N/A*	N/A*	2,329	4,800	5,000
Passport Photos	N/A*	N/A*	1,007	2,400	2,500
*Passport services were first offered in 2021-2022.					

# 2025901000—Recorder-Equipment/Automation

## General Government

Steve J. Bestolarides, Assessor-Recorder-County Clerk  
[www.sigov.org/departments/assessor](http://www.sigov.org/departments/assessor)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$195,964	\$570,000	\$564,848	\$564,848	(\$5,152)
Centrally-Budgeted Expenses	6,741	6,739	6,739	6,739	0
Operating Transfers Out	0	1,037,900	1,640,485	1,640,485	602,585
Total Appropriations	\$202,705	\$1,614,639	\$2,212,072	\$2,212,072	\$597,433
<b>Earned Revenues By Source</b>					
Interest/Rents	\$25,928	\$75,000	\$70,000	\$70,000	(\$5,000)
Charges For Services	1,260,858	1,078,000	720,864	720,864	(357,136)
Operating Transfers In	0	3,000	7,103	7,103	4,103
Total Revenues	\$1,286,786	\$1,156,000	\$797,967	\$797,967	(\$358,033)
Net County Cost	(\$1,084,081)	\$458,639	\$1,414,105	\$1,414,105	\$955,466

## Purpose

The Recorder's Modernization Fund is established by Government Code Section 27361(c) and can be used "solely to support, maintain, improve, and provide for the full operation for modernized creation, retention, and retrieval of information in each county's system of recorded documents."

This budget centralizes special purpose revenues and expenditures for the ongoing support, maintenance, and improvement of the Recorder's micrographics and data automation.

## Major Budget Changes

### Services & Supplies

- \$56,067 Increase in software and related license costs.
- (\$57,300) Decrease in professional services due to project completion.

### Operating Transfers Out

- \$602,585 Increase in transfers to Assessor-Recorder-County Clerk budgets for automation projects.

### Revenues

- (\$57,808) Decrease in micrographics fees.
- (\$299,328) Decrease in recording equipment fees.

## Program Discussion

The 2023-2024 recommended Recorder-Equipment/Automation budget totals \$2,212,072, which is an increase of \$597,433 from the 2022-2023 adjusted budget.

## Fund Balance

### Recorder's Modernization Fund

As of March 31, 2023, the Recorder's Modernization Special Revenue Fund (#20037) balance was \$8,635,225. The 2023-2024 recommended budget includes a transfer of \$1,640,485 from the Fund to the Assessor-Recorder-County Clerk budgets to support the maintenance and management of equipment and automation efforts. This represents an increase of \$602,585 from 2022-2023.

# 1011200000—Purchasing & Support Services

## General Government

Adrian Brown, *Purchasing & Support Services Director*  
[www.sjgov.org/departments/pss](http://www.sjgov.org/departments/pss)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,756,877	\$3,145,281	\$3,300,985	\$3,300,985	\$155,704
Services & Supplies	869,212	1,004,588	1,019,537	1,019,537	14,949
Centrally-Budgeted Expenses	255,494	372,658	239,652	239,652	(133,006)
Capital Expenditures	22,232	50,000	50,000	50,000	0
Operating Transfers Out	10,000	10,000	10,000	10,000	0
Total Expenditures	\$3,913,815	\$4,582,527	\$4,620,174	\$4,620,174	\$37,647
Expenditure Reimbursements	(4,549,748)	(4,192,214)	(4,364,232)	(4,364,232)	(172,018)
Total Appropriations	(\$635,933)	\$390,313	\$255,942	\$255,942	(\$134,371)
<b>Earned Revenues By Source</b>					
Charges For Services	\$154,803	\$155,674	\$155,726	\$155,726	\$52
Miscellaneous Revenues	54,755	50,000	50,000	50,000	0
Operating Transfers In	0	50,000	50,000	50,000	0
Total Revenues	\$209,558	\$255,674	\$255,726	\$255,726	\$52
<b>Net County Cost</b>	(\$845,491)	\$134,639	\$216	\$216	(\$134,423)
<b>Allocated Positions</b>	25.0	26.0	26.0	26.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	4.5	4.5	4.5	4.5	0.0
<b>Total Staffing</b>	29.5	30.5	30.5	30.5	0.0

## Purpose

The Purchasing and Support Services Division (Purchasing) is responsible for providing a variety of central support services to County departments. These areas of responsibility include procurement of materials and services; mail/courier duties; duplicating and print shop operations; records storage; and recycling functions. The Division is also responsible for disposing of surplus or scrap County personal property.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve the Deputy Purchasing Agent vacancy rate	27%	0%	June 2025

# 1011200000—Purchasing & Support Services

## General Government

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Work with Human Resources on Deputy Purchasing Agent and Purchasing Assistant classification studies	In progress	Completed	June 2024
Economic Development			
Expand Small Business Growth	Current	Target	Deadline
➤ Increase dollars spent with local small vendors by 7% each year	173.4 Million	185.5 Million 198.5 Million	June 2024 June 2025
➤ Increase “How To Do Business with the County” community outreach events	2 Events per year	3 Events per year 4 Events per year	June 2024 June 2025
Increase Transportation/Logistics/Warehousing Businesses	Current	Target	Deadline
➤ Purchase a commercial shredder	In progress	Completed	June 2024
➤ Include additional County Departments in the Records Retention Policy	51%	60%	June 2024

### Major Budget Changes

#### Salaries & Employee Benefits

- \$155,704 Salary and benefits adjustments.

#### Services & Supplies

- \$17,700 Increase in office supply costs.

#### Centrally-Budgeted Expenses

- \$18,622 Increase in Workers’ Compensation and Casualty insurance costs.
- (\$152,796) Decrease in data processing charges.

#### Capital Expenditures - Equipment

- \$50,000 Re-budgeted shredder.

#### Expenditure Reimbursements

- \$14,950 Increase in reimbursements from departments for services.
- \$157,068 Cost Allocation Plan adjustment.

### Program Discussion

The 2023-2024 recommended Purchasing and Support Services Division (Purchasing) budget totals \$4,620,174, which is an increase of \$37,647 from the 2022-2023 adjusted budget.

The Net County Cost totals \$216, which is a decrease of \$134,423 from the 2022-2023 adjusted budget.



# 1011200000—Purchasing & Support Services

## General Government

The following departments reimburse Purchasing for dedicated full-time equivalent (FTE) staffing:

Departments	FTE
Behavioral Health Services	1.00
General Services Department	1.00
Human Services Agency	1.00
Information Systems Division	1.00
Public Works Department	1.75
San Joaquin General Hospital	2.00

Purchasing continues providing core procurement services to all departments using competitive quotes, bids, proposals, negotiations, and cooperative purchase contracts to help reduce and avoid costs. The Countywide procurement workload continues to be distributed among 11 full-time and three part-time Purchasing personnel. Each purchasing professional provides dedicated services to assigned departments—one point of contact for consultation and service needs. This gives Purchasing a better understanding of each department’s needs and improves customer service.

The total dollar value of purchase orders for 2023-2024 is projected at \$476.7 million, a 10% increase from 2022- 2023 projections due to increased procurements for capital and information technology projects.

### Uniform Public Construction Cost Accounting Act (UPCCAA)

UPCCAA provides departments with a streamlined bidding process for construction projects under \$200,000. In 2022-2023, 39 projects are anticipated to be completed via UPCCAA with an estimated construction contract value of \$1.2 million. In 2023-2024, project volume is expected to be 43 projects with an estimated construction contract value of \$1.3 million. Projects primarily encompass needed repairs, modifications, or enhancements to County properties.

### Local Vendor Preference (LVP)

LVP continues to be applied where appropriate, benefiting local vendors competing for County contracts. Efforts to identify, encourage, and advocate for local participation continues, including the continued involvement and support of the San Joaquin Public Agency Consortium. The Public Purchase system enhances local vendor outreach for bids, proposals, and quote requests. This system sends electronic bid opportunity notifications to local vendors registered for related commodity classifications.

### Surplus

Purchasing manages the disposal of surplus County furniture and equipment using methods that return the most value to the County.

Online auctions are an easy and convenient way to auction items no longer in use. Auctions are made available to other County departments at no cost before being made available to local charities at a nominal fee. Auctions are open to the general public if items are not first won through County or charity bidding. When possible, unsold items are sent for recycling or taken to landfills.

Live auctions provide the highest value for disposing of vehicles that are no longer used.

A memorandum is provided to the Board of Supervisors each year detailing the types of items sold and revenue generated. In 2023-2024, the number of surplus goods sold is anticipated to total \$217,401, an increase of \$3,710 from what is projected in 2022-2023.

### Duplicating/Print Shop

The Duplicating/Print Shop has high-volume equipment that provides all-digital technology, including speed, quality, and in-line finishing capabilities. The equipment carries a lower per-copy cost as compared to standard office-size equipment. Duplicating is anticipated to produce approximately 4.2 million copies in 2022-2023. A slight increase in volume is expected in 2023-2024.

In 2022-2023, Purchasing issued a Request for Proposal (RFP) for the procurement of new Print Shop copiers. Ricoh was chosen as the vendor, and the printers were installed. This equipment enables specialized printing orders generally sent out of County to print. This is intended to increase the products offered to departments and improve service. The new machines decrease lead times and cut costs for existing and new printing projects.

### Mail Room

The Mail Room provides daily courier and mail collection services for 51 separate mail routes totaling approximately 20,000 miles annually. Equipment used to sort and barcode outgoing mail provides postage savings of up to 10.5 cents for each piece of presorted mail. Total outgoing U.S. mail volume is projected at 785,677 articles in 2023-2024, a slight increase from what is anticipated in 2022-2023, due to a projected increase in first-class mailings. The Mail Room also provides folding and inserting services to County departments at a minimal fee.

# 1011200000—Purchasing & Support Services

## General Government

The Mail Room is responsible for collecting and staging recycling from the Administration Building, including paper, cardboard, pallets, foam packaging, single-use and rechargeable batteries, toner cartridges, and other recyclable materials. In addition, the Mail Room receives palletized deliveries for the District Attorney's Office and all incoming freight for the Administration Building.

### Records Management

Records Management operates the records storage warehouse facility, provides records retrieval and delivery, and destruction and recycling of records, as needed. Staff

collects paper waste throughout the County. A commercial shredder has been re-budgeted for replacement in 2023-2024, funded by a transfer from Purchasing's Internal Service Fund. Shredding equipment must meet the Department of Justice (DOJ) standards to shred County Law and Justice records. In 2022-2023, Purchasing faced challenges locating equipment compliant with the DOJ standards. A vehicle with an onboard shredder is also used on-site at various County locations should department personnel need to witness document destruction. All recyclable paper products are taken to a recycler and sold. In 2022-2023, an estimated 375 tons of paper was recycled. Shredding volume is anticipated to increase in 2023-2024.

### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Procurement</b>					
<i>Purchase Orders Issued</i>	3,554	3,687	3,895	3,443	3,787
<i>Dollar Value of Purchase Orders</i>	\$294,763,570	\$368,210,548	\$420,296,552	\$433,353,376	\$476,688,714
<i>UPCCAA Projects</i>	8	36	45	39	43
<i>Construction Contract Values</i>	\$1,288,747	\$1,351,989	\$1,657,713	\$1,214,879	\$1,336,367
<i>Formal Bids and RFPs</i>	55	43	40	40	44
<b>Local Spend*</b>					
<i>Dollars</i>	\$143,000,000	\$116,960,760	\$135,739,865	\$126,124,830	\$138,737,313
<i>Percentage</i>	49%	32%	41%	31%	31%
<b>Surplus Income</b>					
<i>Property</i>	\$18,000	\$56,288	\$14,837	\$28,108	\$28,389
<i>Recycled Ink/Toner</i>	\$130**	\$138	\$158	\$100	\$132
<i>Recycled Metal</i>	\$1,300	\$267	\$1,320	\$984	\$857
<i>Recycled Paper</i>	\$13,173	\$13,663	\$27,915	\$18,000	\$19,859
<i>Vehicle Sales</i>	\$104,804	\$130,599	\$113,153	\$166,499	\$168,164
<b>Duplicating (Print Shop)</b>					
<i>Print Jobs</i>	1,010	891	824	1,150	1,162
<i>Copies Produced</i>	4,055,863	3,845,528	2,129,862	4,200,000	4,242,000
<b>Mail Room</b>					
<i>Outgoing U.S. Mail</i>	705,000	797,988	726,492	780,000	785,677
<i>1st Class Regular</i>	125,000	178,751	153,495	145,000	156,850
<i>Postal Barcode</i>	575,000	619,237	572,997	635,000	628,828
<i>Service Locations</i>	51	51	50	50	50
<b>Records Management</b>					
<i>Paper Recycled (tons)</i>	275	324	224	375	379
<i>Records Requests Processed</i>	2,600	1,625	1,300	1,496	1,892
<i>Shredding (hours)</i>	1,850	1,835	1,334	2,522	2,547

\*Local Spend: Based on vendor ZIP Code information with statistical outliers of greater than \$10.0 million removed.

\*\*Restated.

# Purchasing Internal Service Fund

## General Government

Adrian Brown, Purchasing & Support Services Director  
[www.sigov.org/department/pss](http://www.sigov.org/department/pss)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$8,090,534	\$7,646,908	\$7,646,908	\$7,646,908	\$0
Centrally-Budgeted Expenses	(32,323)	18,943	16,845	16,845	(2,098)
Operating Transfers Out	0	50,000	50,000	50,000	0
Total Appropriations	\$8,058,211	\$7,715,851	\$7,713,753	\$7,713,753	(\$2,098)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$3,524	\$18,000	\$18,000	\$18,000	\$0
Operating Transfers In	10,000	0	0	0	0
MP-TEL-RAD-PUR Revenue	8,157,116	7,577,985	7,577,985	7,577,985	0
Total Revenues	\$8,170,640	\$7,595,985	\$7,595,985	\$7,595,985	\$0
<b>Revenues (Over)/Under Expenses</b>	(\$112,429)	\$119,866	\$117,768	\$117,768	(\$2,098)

- MP-TEL-RAD-PUR revenue includes charges to user departments for CAL-Card, office supply, copy machines, bottled water, and security alarm costs.

## Purpose

The Purchasing Internal Service Fund (ISF) (#8400112100, #8400112200, and #8400112300) serves as an operating mechanism for the Procurement Card (CAL-Card), office supply, copy machine, security alarm, and bottled water programs. Vendor charges are paid from the ISF and billed to user departments.

## Program Discussion

The 2023-2024 recommended budget for the Purchasing Internal Service Fund totals \$7,713,753, which represents an immaterial change from the 2022-2023 adjusted budget.

### Procurement Card Program

The County participates in the State CAL-Card Program. CAL-Card provides a flexible payment mechanism for acquiring goods and services with flexible spending limits and merchant category codes for each card. Cards are issued in the cardholder's name and billed to the County. The Program allows departments to make purchases from various sources, saving the County time and money. All CAL-Card users are trained on use guidelines before receiving a credit card. Each purchase transaction is audited thoroughly. There are currently 466 cardholders. The estimated purchases for 2022-2023 are \$4.1 million, a slight increase from 2021-2022.

### Office Supply Program

The current office supply vendor contract with ODP Business Solutions, formerly Office Depot, provides fiscal advantages resulting in reduced costs to all departments. The cooperative

contract includes a 13% average purchase discount for core products while maintaining a small rebate. Prompt weekly payment processing to the vendor provides an additional 2% discount. These lower prices have reduced supply costs Countywide. Administrative processing fees help offset the cost of administering this contract. Purchases under this Program are projected to be approximately \$1.3 million in 2023-2024, a slight increase from 2022-2023.

### Copy Machine Program

There are currently 472 leased copiers in the Copy Machine Program, producing approximately 48.3 million copies in 2022-2023, a 7.1% decrease from 2021-2022. During 2022-2023, older copiers were replaced with newer models at a reduced rental rate and cost-per-copy price, providing the best possible overall copier solution that meets cost, performance, and environmental objectives. The Program is anticipated to increase in 2023-2024.

### Security Alarm Program

The Purchasing and Support Services Division (Purchasing) administers contracts for security alarm services. There are currently 78 service contracts in effect for the County.

# Purchasing Internal Service Fund

## General Government

Centralized billing and contracting provided by Purchasing has allowed oversight of this service and ensures that all contracts are properly executed.

### Bottled Water Program

The Purchasing Division administers the Bottled Water Program through centralized billing and contracting. The Program provides water cooling systems or bottled water to user departments.

## Fund Balance

### Purchasing ISF

User departments fully reimburse program costs in the Purchasing ISF budget for services rendered. As of March 31, 2023, the Purchasing ISF (#38040) had a fund balance of \$802,573 and serves as the working capital for various programs/operations under the ISF. The 2023-2024 recommended budget includes \$117,768 in funding to purchase a new shredder in the Purchasing and Support Services budget (#1011200000) and fund additional operational costs.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Procurement Card</b>					
<i>Cards Issued</i>	475	466	466	466	471
<i>Transactions</i>	20,923	19,096	19,194	20,780	22,521
<i>Total Charges</i>	\$4,105,951	\$4,394,914	\$3,899,548	\$4,052,172	\$4,676,114
<b>Average Transaction Value</b>	\$196	\$199	\$203	\$195	\$207
<b>Office Supply (ODP Business Solutions)</b>					
<i>Value of Purchases</i>	\$1,342,772	\$1,292,949	\$1,09,021	\$1,439,041	\$1,306,363
<b>Copy Machine</b>					
<i>Copy Machines Installed</i>	472*	550	463	472	472
<i>Lease Payments</i>	\$1,336,714	\$1,209,538	1,968,289	1,982,252	\$1,018,983
<i>Copy Transactions</i>	45,716,608	32,675,770	31,305,809	28,491,078	50,000,000
<b>Security Alarm</b>					
<i>Contracts</i>	100	100	78*	78*	78

\*Restated

# 1011800000—County Counsel

## General Government

Edward J. Kiernan, County Counsel  
[www.sigov.org/departments/cc](http://www.sigov.org/departments/cc)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,947,125	\$5,209,263	\$5,691,520	\$5,691,520	\$482,257
Services & Supplies	350,672	462,863	604,608	604,608	141,745
Centrally-Budgeted Expenses	97,002	111,769	128,796	128,796	17,027
Total Expenditures	\$5,394,799	\$5,783,895	\$6,424,924	\$6,424,924	\$641,029
Expenditure Reimbursements	(5,596,519)	(4,583,484)	(5,714,055)	(5,714,055)	(1,130,571)
Total Appropriations	(\$201,720)	\$1,200,411	\$710,869	\$710,869	(\$489,542)
<b>Earned Revenues By Source</b>					
Charges For Services	\$70,923	\$68,550	\$68,550	\$68,550	\$0
Total Revenues	\$70,923	\$68,550	\$68,550	\$68,550	\$0
<b>Net County Cost</b>	(\$272,643)	\$1,131,861	\$642,319	\$642,319	(\$489,542)
<b>Allocated Positions</b>	20.0	20.0	20.0	20.0	0.0
Temporary (Full-Time Equivalent)	0.8	0.5	0.0	0.0	(0.5)
<b>Total Staffing</b>	20.8	20.5	20.0	20.0	(0.5)

## Purpose

The Office of the County Counsel (Office) serves as general legal counsel for the County of San Joaquin. The Office serves as principal legal counsel for the Board of Supervisors and provides legal services for all County departments, offices, agencies, and commissions, as well as other independent local agencies (In-Home Supportive Services Public Authority, San Joaquin County Employees' Retirement Association, and San Joaquin County Clinics), Special Districts, and the Civil Grand Jury.

The Office renders legal advice and support on issues such as elections, health care, land use, labor, personnel, public safety, and social services. The Office prosecutes cases concerning conservatorship and probate proceedings, debt collection, juvenile dependency cases, and personnel discipline arbitration. The Office also defends and oversees the defense of litigation brought against the County and is principally responsible for the County's compliance with the California Public Records Act.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Study the feasibility of creating County Counsel practice areas aimed at increasing the breadth of knowledge, skill, and ability for better utilization among County departments.	0%	100% Complete	October 2024

# 1011800000—County Counsel

## General Government

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Conduct a satisfaction survey of County departments receiving legal advice and representation from the Office.	0%	100% Complete	April 2024
Demonstrate Leadership Development	Current	Target	Deadline
➤ Enroll attorneys and staff in training offered by the County Counsel's Association, Stockton-San Joaquin Legal Professional Association, and others designed to enhance employee skillsets in their subjects of expertise.	26%	75% Complete 100% Complete	April 2024 April 2025
➤ The County Counsel Discipline Committee will collaborate with Human Resources to develop an in-house training program that explores the legal ramifications associated with reasonable accommodations, discipline, discrimination, harassment, retaliation, and other topics frequently dealt with by Human Resources.	0%	100% Complete	March 2025
Fiscal Optimization			
Maintain a Structurally Balanced Budget	Current	Target	Deadline
➤ Enroll County Counsel management team in County budgeting and financial planning training course.	0%	100% Complete	June 2024

## Major Budget Changes

### Salaries & Employee Benefits

- \$427,865 Salary and benefits adjustments.
- (\$18,954) Decrease in extra help.

### Services & Supplies

- \$244,394 Increase in costs for space planning study, ergonomic studies, and associated costs.
- \$22,750 Increase in training and travel costs.
- \$13,531 Increase in subscriptions and periodicals costs.
- (\$150,000) Decrease in professional services for outside legal consultation and labor negotiations reimbursed by Human Resources (HR).

## Centrally-Budgeted Expenses

- \$15,348 Increase in data processing charges.

## Expenditure Reimbursements

- \$93,000 Increase in reimbursement of direct costs from Public Works-Water Resources.
- \$54,709 Increase in reimbursement of direct costs from Public Conservator.
- \$45,000 Increase in reimbursement of direct costs from Retirement.
- \$34,481 Increase in reimbursement of direct costs from San Joaquin General Hospital.
- \$31,500 Increase in reimbursement of direct costs from the Stockton Metropolitan Airport.

# 1011800000—County Counsel

## General Government

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- \$23,400 Increase in reimbursement of direct costs from Mental Health Services.
- (\$150,000) Decrease in reimbursement of direct costs from HR to offset professional services expenses.
- (\$10,000) Decrease in reimbursement of direct costs from Solid Waste.
- \$1,007,781 Cost Allocation Plan adjustment.

### Program Discussion

The 2023-2024 recommended budget for the Office of the County Counsel (Office) totals \$6,424,924, which is an increase of \$641,029 from the 2022-2023 adjusted budget.

#### 2022-2023 Year in Review

Through March 31, 2023, the Office had a vacancy rate of 10%. A deputy position became vacant in February 2022 and the former County Counsel retired in September 2023. Edward J. Kiernan was appointed County Counsel on April 11, 2023 (B-23-149) and began serving in the position on May 22, 2023. The deputy position remains unfilled. Despite the loss of a key deputy position, it is projected the Office will devote 22,895 hours by the end of 2022-2023, down 1,049 actual attorney hours from 2021-2022.

#### Registrar of Voters

As of March 2023, more than 630 attorney hours were spent providing significant legal support to the Registrar of Voters (ROV) during the 2022 Statewide Primary and General Elections (Elections).

This included, but was not limited to:

- Providing steadfast legal advice to the ROV as part of the ROV's administration of the Elections;
- Reviewing contracts for services, goods, and leases for polling places as utilized by the ROV in the Elections;
- Assisting the ROV in responding to election integrity issues raised by the public and the Board of Supervisors;
- Participating in the 2022 Election Advisory Committee meetings as counsel to the ROV;
- Assisting the ROV in responding to requests for records and information under the California Public Records Act and in furtherance of the ROV's desire to administer transparent elections; and

- Providing legal advice to the ROV related to the Voter's Choice Act.

#### Water Issues

Matters involving water rights, groundwater, and the Sacramento-San Joaquin Delta were very active in 2022-2023. The Office has, either directly and/or with the assistance of outside counsel, kept abreast of water issues affecting not only the County, but a significant portion of Northern California, including preparing and submitting comments to the draft Environmental Impact Report and Environmental Impact Statement for the Delta Conveyance Project, and strategizing on next steps. With the state of California's growth and recurring drought issues, water continues to be at the forefront of the County's key concerns. In most instances of water litigation, this Office has been able to work with other local governments to ease the financial burden of the County. County Counsel has devoted more than 600 hours to water issues, triple the hours spent in 2021-2022.

#### Quality of Life Issues

As it relates to quality of life issues, County Counsel initiated four nuisance actions against property owners who failed to comply with the County's Development Title and caused, maintained, and/or permitted the maintenance of a public nuisance based on their use of the property (e.g., storage of junk vehicles, boats, RVs, cargo containers, and mobile homes, etc.) or their failure to maintain habitable living conditions for the inhabitants of their property. At least one case, which is now in receivership and pending sale, involved the absentee owner of a mobile home park with raw sewage and human waste discharge; broken and clogged septic drains and sewer lines; accumulated waste; dilapidated RVs; and vehicles blocking ingress/egress and fire access.

In 2023-2024, County Counsel will continue to:

- Work closely with the Board of Supervisors, County Administrator's Office, and County departments on significant legal matters affecting the County, including but not limited to the Sustainable Groundwater Management Act, water rights on the Mokelumne River, and water rights and governance issues concerning the Sacramento-San Joaquin Delta, including the Delta Conveyance Project.
- Provide legal and practical advice to elections and election integrity, quality of life matters (public nuisance), and continue legal efforts related to business development at the Stockton Metropolitan Airport.
- Supervise and staff litigation on a wide variety of matters, including tort defense, civil rights claims,

# 1011800000—County Counsel

## General Government

medical malpractice, breach of contract, and employment-related claims.

- Provide legal and practical advice to all County departments in their day-to-day business to help achieve the overall goal of avoidance of legal disputes and the appropriate resolution of any legal disputes and lawsuits, which may still occur.

### Outside Legal Counsel

The following table includes the aggregate spend on outside legal counsel services. Costs include fees for Public Employment Relations Board (PERB) cases, employee

investigations, litigation, and costs associated with employee investigations under Rule 20 and unfair labor practice complaints filed by the unions.

	2021-2022*	2022-2023**
Casualty	\$3,311,509	\$1,770,306
Medical Malpractice	659,482	573,653
<b>Total</b>	<b>\$3,970,991</b>	<b>\$2,343,959</b>

\*Actuals

\*\*Through February 28, 2023

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Attorney Hours</b>					
Community Development & Public Works Issues	1,764*	1,031*	1,452	1,245	1,242
CPRA Issues	N/A**	845	826	914	862
Contract Issues	2,572*	2,358*	2,185	2,740	2,428
County Administration Issues	3,144*	3,005*	3,372	2,277	2,885
Health & Public Assistance Issues	3,503*	3,931*	4,413	3,704	4,016
Labor Relations Issues	2,399*	1,845*	1,220	764	1,276
Law and Justice Issues	1,010*	1,455*	1,852	1,887	1,731
Litigation Hours	6,933*	7,416*	6,892	6,497	6,935
Retirement Issues	643	579	744	515	613
Revenue Issues	247	390	459	543	464
Water & Special District Issues	181	228	529	573	443
<b>Total Attorney Hours</b>	<b>22,396*</b>	<b>23,083*</b>	<b>23,944</b>	<b>21,659</b>	<b>22,895</b>

\*Inclusive of COVID-19 related hours.

\*\*Tracking began in 2020-2021.



# 1012400000—Human Resources

## General Government

Jennifer Goodman, *Human Resources Director*  
[www.sjgov.org/departments/hr](http://www.sjgov.org/departments/hr)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$7,917,799	\$8,714,210	\$9,708,644	\$9,708,644	\$994,434
Services & Supplies	759,936	1,143,125	1,119,396	1,119,396	(23,729)
Centrally-Budgeted Expenses	2,285,917	2,650,735	2,790,983	2,790,983	140,248
Total Expenditures	\$10,963,652	\$12,508,070	\$13,619,023	\$13,619,023	\$1,110,953
Expenditure Reimbursements	(8,961,103)	(9,471,889)	(10,509,998)	(10,509,998)	(1,038,109)
Total Appropriations	\$2,002,549	\$3,036,181	\$3,109,025	\$3,109,025	\$72,844
<b>Earned Revenues By Source</b>					
Charges For Services	\$812,342	\$864,298	\$947,240	\$947,240	\$82,942
Miscellaneous Revenues	136,980	100,075	100,075	100,075	0
Total Revenues	\$949,322	\$964,373	\$1,047,315	\$1,047,315	\$82,942
Net County Cost	\$1,053,227	\$2,071,808	\$2,061,710	\$2,061,710	(\$10,098)
Allocated Positions	51.0	53.0	56.0	56.0	3.0

## Purpose

The Human Resources (HR) Division provides centralized human resources and labor relations services for all County departments, including employment services; exam development; equal employment opportunity program; policy administration; classification and compensation; leave administration; administration of County medical, dental, Workers' Compensation, Unemployment, Casualty, and Life Insurance programs; County Safety and Prevention Program, and the administration of training, staff development, education, deferred compensation, and flexible spending programs.

HR negotiates labor contracts (Memorandums of Understanding); processes complaints and grievances; conducts meet and confer sessions and joint labor-management meetings; advises County departments on disciplinary actions and counseling matters; recommends policy and procedures for employer-employee relations; and provides staff for the Civil Service Commission, Equal Employment Opportunity Advisory Committee, and Deferred Compensation Advisory Committee.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Employment Services - Improve employee retention by reducing attrition	1.05% monthly attrition rate as of June 30, 2022	.95% monthly attrition rate	June 2024

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## General Government

➤ Employment Services - Improve County Vacancy Rate	16.4% vacancy rate as of March 2023	Reduce Countywide vacancy rate by 2%	June 2024
➤ Benefits – Enhance Employee Self-Service functionality in PeopleSoft	In-person submission of information relating to change in benefit status due to qualifying event	Implement self-service module in PeopleSoft, electronic submittal of information relating to change in benefit status due to qualifying event	September 2023
➤ Benefits - Streamline wage replacement benefits in collaboration with Employment Development Department (EDD)	Inconsistent application	Countywide consistent application, include use of EDD online portal	September 2024
Demonstrate Leadership Development	Current	Target	Deadline
➤ Staff Development – Partner with County Counsel Discipline Committee to develop an in-house training program to explore the legal ramification with reasonable accommodations, discipline, discrimination, harassment, retaliation, and other related topics.	0%	100%	March 2025
<b>Fiscal Optimization</b>			
Proactively Manage Labor Costs	Current	Target	Deadline
➤ Staff Development-Design a “Budget Management” HRLA course to support managers with fiduciary responsibilities	Begin course development in April 2023	Complete course development and begin courses	July 2023
➤ Workers’ Compensation-Early Intervention Pilot Program for Public Works	Public Works experiences an average loss of 689 work days as a result of workplace injuries	Reduce average day loss by 5%	June 2024
<b>Public Safety/Criminal Justice/Quality of Life</b>			
Provide Adequate Resources for Public Safety and Criminal Justice	Current	Target	Deadline
➤ Supply HR to Law Enforcement Departments	Centralize HR Service Model	Pilot a decentralized HR Service Model for the Sheriff’s Office	Staff Pilot- July 2023 Evaluate Pilot – June 2024

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## General Government

Homelessness			
Promote Expansion of Behavioral Health Clinicians and Services	Current	Target	Deadline
➤ Staff Development - Develop Behavioral Health Services Apprenticeship to support more clinicians	Begin program development in February 2023	Enroll participants in the 3 year educational and on-the-job training program	August 2023

### Major Budget Changes

#### Salaries & Employee Benefits

- \$465,235 Salary and benefits adjustments.
- \$302,264 Add two Personnel Analysts I-II.
- \$165,039 Add a Personnel Analyst III.
- \$146,945 Add an Employee Relations Analyst III.
- (\$85,049) Delete a Senior Office Assistant.

#### Services & Supplies

- \$22,000 Increase in costs due to recruitment background policy.
- \$20,400 Increase in employment service award costs.
- \$12,600 Increase in vendor recruitment membership costs.
- (\$39,172) Decrease in professional legal services.

#### Centrally-Budgeted Expenses

- \$195,034 Increase in Casualty insurance costs.
- (\$73,671) Decrease in data processing charges.

#### Expenditure Reimbursements

- \$470,210 Increase in reimbursements from departments for direct charges.

- (\$246,631) Decrease in reimbursements from Internal Service Funds.

- (\$201,604) Decrease in reimbursements from San Joaquin General Hospital.

- \$1,012,882 Cost Allocation Plan adjustment.

#### Revenues

- \$77,220 Increase in administrative fee revenue due to increase in Kaiser Health enrollment.

### Program Discussion

The 2023-2024 recommended budget for Human Resources (HR) totals \$13,619,023, which is an increase of \$1,110,953 from the 2022-2023 adjusted budget.

#### Employment Services Unit

Staff continued implementing innovative approaches to provide County departments with pools of qualified candidates for hiring consideration while remaining in compliance with the Civil Service testing requirements. Staff significantly reduced in-person examinations by incorporating online testing options for written and oral examination interviews. The impacts of these changes have resulted in increased candidate participation numbers.

The overall labor market trends during the COVID-19 pandemic continued to affect the number of applicants seeking employment. During 2022-2023, the number of applications reduced by 14%, and the number of recruitments conducted reduced by 17.2%. The reduction of recruitments conducted is primarily due to focused outreach efforts that included keeping recruitments open for an extended period to maximize an ability to produce viable candidate pools. For 2022-2023 staff now have 85 Civil Service written examinations converted into online examinations, resulting in improved participation rates,

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## General Government

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better overall size and quality of candidate pools, and the flexibility to take examinations at a convenient time and place. In 2022-2023, HR conducted 158 bilingual proficiency examinations remotely, which are on-demand and allow for testing and certification of language proficiency in over 100 languages. Staff continues to evaluate the effectiveness of all testing platforms and work towards incorporating additional testing flexibility to support County departments further seeking to fill critical vacancies with a targeted focus on law enforcement and essential health care positions.

To ensure timely and supportive HR services to the Health Care Services Agency, Human Resources is adding a Personnel Analyst II allocation to provide flexible and timely services to the Agency, whose mandates require significant support in classification, compensation, recruitment, and retention.

Human Resources will partner with the Sheriff's Office to pilot decentralized HR services by allocating two Personnel Analyst I-II positions at the Sheriff's Office. They will support recruitment, performance management, disability management, and training.

Employment Services staff will increase productivity by leveraging technology to communicate with candidates and to facilitate selection processes for Civil Service and exempt status positions. This will include an added feature through the County's applicant tracking system, allowing applicants to receive status updates on recruitment and selection interviews via text messages.

In September 2022, the Board adopted a Countywide Recruitment and Retention Incentive Program for designated Hard-to-Recruit positions (B-22-488). The Program includes vacation accrual rates, sick leave bank incentives, and retention bonuses for new hires. This program is incorporated into outreach efforts for all classifications on the designated Hard-to-Recruit list. Staff will continue to expand social media presence and community outreach activities through high schools, colleges, and other academic groups to educate and capture the interest of students considering a career in public employment.

Additionally, Employment Services staff support the County's pre-employment screening processes, including backgrounds, drug screening, and arduous physicals for County candidates, depending on the classification. The Countywide Background Investigation Program ensures all new hires to County employment and existing employees promoted into unrepresented positions successfully pass a background check. In 2024, staff plans to evaluate the current pre-employment screening policies to ensure continued compliance with upcoming legislative updates.

All County employees are Disaster Service Workers (DSWs) by the nature of their employment. The Employment Services Unit supports the Office of Emergency Services in providing DSWs during local emergencies.

### Classification & Compensation

Classification and Compensation added a Personnel Analyst II in 2022-2023. Services provided include maintenance of the County's Classification Plan and base salary, total compensation, benefits, and other compensation survey work for new and existing classifications. While the need for compensation surveys for collective bargaining purposes has waned, an increase in new classifications has emphasized market and internal equity studies related to these projects. In 2023-2024, Classification will focus on collaborating with County departments and agencies to understand organizational needs and challenges while continuing to develop a cohesive Countywide classification structure. This will allow staff to proactively prioritize classification and accurately create and amend classifications to the current workforce.

### Leave Management

In 2022, the COVID-19 pandemic continued to bring significant changes in State leave laws to provide emergency relief to employees impacted by specific COVID-19-related absences. In response, the HR Leave Administration Unit maintained an operational focus on providing the necessary guidance and oversight to implement time-sensitive COVID-19 laws and regulations that included continuing earnings and benefits to the extent permitted by law.

In February 2022, the State signed a new 2022 COVID-19 Supplemental Paid Sick Leave (SPSL) provision into law. The SPSL provision provided up to 80 hours of supplemental paid sick leave to impacted County employees retroactive to January 1, 2022, and expired on December 30, 2022. HR processed and monitored over 4,800 COVID-19-related requests under the 2022 COVID-19 SPSL provision, which provided \$6.2 million of paid sick leave to eligible County employees.

The State approved Occupational Safety and Health Standards (Cal/OSHA) Emergency Temporary Standards (ETS) on COVID-19 infection prevention in November 2020, ending in January 2023. In December 2022, the OSHA Board voted to adopt non-emergency COVID-19 Prevention regulations. These regulations took effect in February 2023 and will remain in effect until February 2025, except for the recordkeeping subsection regulations that will remain until February 2026. These regulations include some of the exact requirements found in the ETS. The requirement to continue employee earnings and benefits when an employee is excluded from work due to a COVID-19 workplace exposure

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## General Government

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was removed under the new regulation (ETS pay ended January 2023). HR reviewed and monitored ETS exclusion pay eligibility for County employees through January 2023.

Additional changes went into effect in January 2023, with the State expanding the definition of a family member under the California Family Rights Act (CFRA) and under Labor Code 245.5, which extends the State Paid Sick Leave Laws, known as the “Healthy Workplace, Healthy Families Act” and Kin Care.” These changes will increase the number of protected leave cases Countywide, the amount of protected leave available, and accrued paid sick leave eligible employees may use during 12 months.

HR continued to review leave requests to ensure legal compliance and consistency with newly adopted leave laws. The Department processed and monitored over 7,400 submissions and provided Countywide training on legal updates, including oversight of online resources such as a dedicated COVID-19 webpage, FAQs, centralized e-mail inquiries/responses, and resource material.

HR will continue to focus on enhancing the leave and disability management programs by increasing knowledge and awareness throughout the County workforce on applicable leave and disability laws.

### Staff Development, Training, & Wellness

Staff Development oversees the coordination of HR-mandated training, an employee wellness program, workforce development, and other areas of employee engagement. In addition to the regular and mandatory training offered through its training catalog, Staff Development hosts a 2-day New Employee Orientation (NEO) training through a live virtual platform. This NEO process focuses on giving staff a high-level overview of their role in County government and consists of mandatory training classes such as Workplace Violence Prevention; Diversity, Respect, and Inclusion; Public Service Ethics; Sexual Harassment and Discrimination Prevention; COVID-19; Cyber Security; and provides an overview of applicable new employee benefits.

HR works to promote health and wellness in a variety of capacities for County employees. The Wellness Gladiators program creates a platform for designated staff assigned as ambassadors from various County departments to meet every quarter to disseminate information to the staff. Classes, seminars, and wellness challenges are all part of the conversations. The SJC Engage wellness program focuses on mental, physical, financial, and professional wellness. This program is offered with support from Power Partners at In-Shape Health Clubs, Kaiser Permanente, and Bank of the West.

Senate Bill 1343 requires all County staff, regardless of status, to participate in legally mandated sexual harassment prevention training every two years. This course is offered through a self-guided online process that can be completed at the employees’ convenience before their renewal expiration.

In 2019-2020, the County pioneered a highly innovative new Civil Service Incumbent Apprenticeship Program developed and implemented to support training and career growth for County employees interested in advancing their careers. Three participants were afforded the opportunity, which allowed the incumbent staff to attend college courses and participate in on-the-job training toward a career in the Information Systems Division (ISD). This three-year program was the first in California and is recognized on a State and Federal level through the Division of Apprenticeship Standards. The program became a model program for other Civil Service apprenticeships.

During 2022-2023, the three-year program for ISD was completed, with all three program participants completing the on-the-job training component, receiving their two-year college degrees, and stepping into their new role of Information System Specialist I.

HR looks forward to building out the Incumbent Apprenticeship Program with the new classification of Mental Health Specialist through the Behavioral Health Division of Health Care Services. This program will help enhance the expansion of Behavioral Health Clinicians and services.

A significant goal in 2023-2024 is to restructure and centralize a County Internship Program. While the County hosts paid and unpaid interns, each department processes and monitors its interns differently. To ensure accurate reporting, eliminate liability, and manage the interns effectively, HR will develop a procedure to streamline the process and ensure consistency Countywide.

Training has consistently sat at the forefront of the Department’s priorities. Aligning with HR’s goal to increase organizational capacity through formalized succession planning and leadership development. HR continues to provide courses in the Human Resources Leadership Academy (HRLA). These courses support growth and career aspirations through the Developing Future Leaders Series (DFLS). HRLA is a mandatory training series of 12 courses established to support managers and supervisors with fundamentals in supervision and tools to promote successful leadership. The DFLS courses are geared toward County staff interested in promotion to a leadership role. These courses help participating employees become more familiar with various County subjects.

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In addition to the courses currently in the HRLA series, this year, HR intends to design a course on budget maintenance to better support the County's managers and supervisors with their fiduciary responsibilities.

### Employee Benefits Overview

Employee Benefits oversees health insurance administration, supplemental retirement savings, and employee benefits programs. Most of these programs are highly regulated by Federal and State laws, with frequently changing regulations. Additionally, Employee Benefits provide management and fiduciary oversight of over \$487.2 million in accumulated employee assets in deferred compensation programs.

In 2022-2023, as part of fiscally-responsible benefits administration and transparency, Benefits staff will continue conducting RFPs and/or bid processes on long-standing vendor contracts.

### Health Care

The County's self-funded plans continue to experience a decrease in enrollment, which causes concern for the plans' future. Rates have increased on average by 11.4% each year since 2018-2019, resulting in an overall increase of 57%. Although there has been some leveling out due to new vendor contracts associated with the self-funded plans, rates are increasing again in 2023-2024 by 5.6%.

Due to new Federal and State mandates, continued erosion of enrollment, and significant costs associated with the self-funded plans due to rich plan design, HR staff is looking at either discontinuing these plans or possibly including an additional self-funded plan option that is more aligned with industry standards for plan design and charges.

As of March 31, 2023, 3,596 employees (72.0%) are enrolled in a Kaiser plan; 540 employees (10.8%) are enrolled in a Sutter Health Plus plan; and 857 (17.2%) are enrolled in one of the Self-Insured plans.

### Employee Assistance Program (EAP)

The current County EAP provider's parent company was purchased and can no longer supply EAP services in California beyond June 30, 2023. Due to this change, staff are working to contract with a new vendor for 2023-2024 and beyond.

### Deferred Compensation

The County provides an additional retirement vehicle for employees through the Deferred Compensation (DC) program which is mainly funded through employee contributions. The program includes a 457 plan, available to all employees, and a 401(a) plan, limited to only two

employee classifications. Through a procurement process in 2021, the County engaged the services of Nationwide effective January 2022 for the Public Employee Health Program (PEHP) administration and May 2022 for DC services. The Director of HR is the program's Plan Administrator and works with the DC Advisory Committee and fiduciary consultant to ensure the program operates under IRS guidelines.

### Equal Employment Opportunity (EEO) Program

The EEO Program provides Countywide services through its primary programs of workplace investigations, consultation and support, workforce compliance, training, and EEO Advisory Committee (EEOAC) administrative support. The Program's primary goal is to enforce Federal and State laws and County policies related to non-discrimination, anti-harassment, and retaliation.

As the recipient of Federal funds, the County must formulate, implement, and maintain an EEO Plan (EEOP) under the authority of Code of Regulations Title 28, Part 42 - Non-discrimination, and applicable County EEO-related policies and procedures. The EEO Office prepares the EEOP with input and review by the EEOAC. The EEO Office presents the EEOP for Board approval and adoption every two years. The Board approved the 2022-2024 EEOP on December 13, 2022 (B-22-676).

The EEO Office receives and investigates complaints of discrimination, harassment, and retaliation under the County's Civil Service Rule 20 - Discrimination Prohibited complaint process. In 2022-2023, the EEO Office received 19 formal complaints and 26 informal complaints, resulting in an increase of 21.6% in total complaints received, compared to the 22 formal and 15 informal complaints received in 2021-2022. During 2021-2022, EEO Office underwent an external review of the County's Civil Service Rule 20 complaint process and EEO policies. In 2023-24, the recommended changes will be reviewed internally with executive leaders, the EEOAC, and various labor organizations as part of the meet and confer process. The EEO Office anticipates completion of the review process and implementation by the end of 2023-2024.

The County must keep records relevant to determining whether unlawful employment practices have been or are being committed. As part of this requirement, the EEO Office investigates complaints of discrimination, harassment, and retaliation and drafts comprehensive, legally defensible post-investigation reports after each investigation.

To comply with Federal and State EEO-related laws, the County must provide ongoing Countywide training for managers, supervisors, and general employees. In

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## General Government

2023-2024, the EEO Office will continue to ensure that every employee complies with the mandated Sexual Harassment and Abusive Conduct Prevention Training. The EEO Office will continue to offer these trainings online and update the curriculum with relevant content as necessary under current laws and regulations.

The EEO Office also leads in coordinating and planning the Annual Diversity Luncheon. To help mitigate the spread of COVID-19, the EEO Office canceled the Annual Diversity Luncheon in 2022. In 2023, the EEO Office, in collaboration with the EEOAC, plans to resume holding the in-person Annual Diversity Luncheon.

In 2023-2024, the EEO Office will continue to research and review various EEO policies and programs from surrounding counties to enable the County to stay abreast of best practices and new program ideas that encourage and promote diversity, inclusion, and equal employment opportunity.

### Labor Relations

#### Successor MOUs

During 2022-2023, new memorandums of understanding (MOUs) were reached with the Service Employees International Union (SEIU), covering six bargaining units, and the Attorneys Association. This represents 78% of the County's represented employees.

An agreement amending the MOU for the Middle Management unit was also reached with the SJC Management Association. This agreement included extending the expiration of the MOU from June 30, 2023, to June 30, 2027. This represents less than 1% of the County's represented employees. During 2022-2023, seven agreements were reached, extending the existing MOU by one year. One-year extension agreements were reached with the Union of American Physicians & Dentists, California Nurses Association, Deputy Sheriffs Association, Sheriff Deputy Sergeants Association, Law Enforcement Management Association, Probation Officers Association, and Correctional Officers Association. This represents 21% of the County's represented employees. Bargaining began during 2022-2023 with the District Attorney Investigators Association; MOU expires on June 30, 2023. This unit represents approximately 1.0% of the County's represented employees.

Bargaining will begin in 2023-2024 with the Union of American Physicians & Dentists; MOU expires on January 1, 2024. The California Nurses Association MOU expires on April 30, 2024, and the Sheriff Deputy Sergeants Association MOU expires on June 30, 2024. This represents 10% of the County's represented employees. Changes in terms and conditions of employment are subject to the

Meyers-Milias-Brown Act (MMBA). This requires Labor Relations staff to negotiate with employee groups over mandatory bargaining subjects and meet with employee groups, when requested, over the impacts of management decisions. Labor Relations staff assists departments in fulfilling this obligation and are often directly involved. Typical impact meet and confer issues include department policy changes and contracting out.

#### Complaint Processing

Labor Relations tracks all complaints and grievances filed in the County and aids departments responsible for responding at process steps one and two. Labor Relations assistance includes guidance on procedure and addressing the merits of a claim. Labor Relations is often charged with providing written responses at step three and coordinating between the parties for step four complaints before the Board of Supervisors or step four grievances before the Civil Service Commission. Labor Relations staff provides training for the HRLA series. This includes "Introduction to Progressive Discipline" and "Union Relations for Managers." Labor Relations staff also assists with training on "Payroll PeopleSoft & FLSA."

#### Additional Staff

The Labor Relations Unit has an Employee Relations Analyst III and a Principal Employee Relations Analyst. A position is requested to be added to the Employee Relations Analyst series. The additional analyst will assist with all facets of the Labor Relations workload, including the collective bargaining process, tracking, processing, and advising departments on complaints, grievances, and employee discipline.

The following table shows the status of the 17 MOUs.

Bargaining Unit	Organization	MOU Expires
In-Home Supportive Services	SEIU**	03/31/23
Peace Officers Miscellaneous	SJDAIA	06/30/23
Physicians	UAPD	01/05/24
Registered Nurses	CNA	04/30/24
Sheriff's Sergeants	SDSA	06/30/24
Sheriff's Non-Management	DSA	10/07/24
Sheriff's Management	LEMA	02/23/25
Probation Officers	SJPOA	06/30/25
Attorneys	SJCAA	11/03/25
Correctional Officers	SJCCOA	03/31/26
Trades, Labor, & Institutional	SEIU*	06/30/26
Paraprofessional & Technical	SEIU*	06/30/26
Professional	SEIU*	06/30/26



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## General Government

Bargaining Unit	Organization	MOU Expires
Safety, Investigative, & Custodial	SEIU*	06/30/26
Supervisors	SEIU*	06/30/26
Trades, Labor, & Institutional	SEIU*	06/30/26
Middle Management	SJCMA	06/30/27
*SEIU Local 1021	**SEIU Local 2015	

### Fund Balance

#### Deferred Compensation – Administration Fund

As of March 31, 2023, the Deferred Compensation Trust Fund (#81192) had a balance of \$30,273. The fund is used to reimburse the HR budget for deferred compensation-related

expenses, and approximately \$50,000 is included in the 2023-2024 HR budget.

### Supplemental Requests

Human Resources is requesting supplemental funding totaling \$61,896 for the following:

#### Employee Relations Analyst

Funding of \$61,896 is requested to add an Employee Relations Analyst III in Labor Relations. The additional analyst will assist with the bargaining process, complaints, grievances, and employee discipline. The position cost of \$146,945 will be offset by deleting a vacant Senior Office Assistant for \$85,049.

The recommended budget has been augmented by \$61,896 to address this request.



# 1012400000—Human Resources

## General Government

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Recruitment &amp; Certification</b>					
<i>Recruitments</i>	560	647	905	750	800
<i>Applications Processed</i>	27,313	24,198	22,469	19,325	20,000
<b>Examinations</b>					
<i>Written Exam Sessions</i>	205	269	85	39	40
<i>Written Exam - Online</i>	N/A	N/A	61	100	120
<i>Oral Exam Days</i>	58	53	30	14	20
<b>Referrals</b>	1,652	1,545	2,713	2,600	2,425
<b>Countywide Vacancy Rate</b>					
<i>Fiscal Year Start</i>	11.98%	11.00%	13.65%	17.69%	17.35%
<i>Fiscal Year Midpoint</i>	10.98%	11.25%	14.20%	17.35%	17.75%
<i>Fiscal Year End</i>	10.60%	10.84%	16.03%	17.01%	16.75%
<i>Fiscal Year Average</i>	11.19%	11.08%	14.62%	17.35%	14.00%
<b>Allocated Position Hires</b>	583	723	773	875	850
<b>Part-time or Temporary Hires</b>	697	780	761	700	675
<i>Total Hires</i>	1,280	1,503	1,534	1,575	1,525
<b>Employee Training Attendance</b>	8,908	9,656	16,687	14,500	15,500
<b>Classification &amp; Compensation</b>					
<i>Classification Projects</i>	16	21	34	34	21
<i>Compensation Studies</i>	10	23	23	13	10
<b>Civil Service Hearings</b>	1	0	0	1	1
<b>Position Control</b>					
<i>E-Pad Actions Processed</i>	13,741	12,704	12,067	13,734	14,089
<i>Mass Updates Processed</i>	3,978	15,762	17,921	18,744	16,282
<b>Equal Employment Opportunities</b>					
<i>Complaints Received (Countywide)</i>	58	34	37	45	50
<i>Formal Complaints (EEO Office)</i>	25	14	22	19	25
<b>Labor Relations</b>					
<i>MOU's Negotiated</i>	1	3	2	8	3
<i>Arbitration Hearings Scheduled</i>	2	11	1	1	4
<i>Complaints Processed</i>	40	50	47	42	45
<i>Impact Meet &amp; Confer Sessions</i>	25	20	25	14	20
<i>Public Employee Relations Board Charges</i>	9	2	0	1	2

# Self-Insurance Internal Service Fund-Health

## General Government

Jennifer Goodman, *Human Resources Director*  
[www.sigov.org/departments/hr](http://www.sigov.org/departments/hr)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$762,587	\$891,610	\$706,630	\$706,630	(\$184,980)
Centrally-Budgeted Expenses	(32,088)	82,677	570,112	570,112	487,435
Medical And Dental Insur ISF Exp	33,552,379	36,577,800	34,044,307	34,044,307	(2,533,493)
Total Appropriations	\$34,282,878	\$37,552,087	\$35,321,049	\$35,321,049	(\$2,231,038)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$54,206	\$100,000	\$100,000	\$100,000	\$0
Charges For Services	529	0	0	0	0
Miscellaneous Revenues	1,975,652	1,500,000	2,000,000	2,000,000	500,000
Self-Insurance Revenue	34,165,584	32,101,860	33,466,337	33,466,337	1,364,477
Total Revenues	\$36,195,971	\$33,701,860	\$35,566,337	\$35,566,337	\$1,864,477
<b>Revenues (Over)/Under Expenses</b>	(\$1,913,093)	\$3,850,227	(\$245,288)	(\$245,288)	(\$4,095,515)

- Medical and Dental ISF Expenses include self-insurance medical claims paid by the Health Insurance budget.

## Purpose

The Health Insurance (#8592500000) budget provides for the centralized administration of the County's self-funded employee health insurance benefit program.

The County's self-funded insurance programs provide quality benefits to eligible recipients. In addition to the self-funded plans, County employees have access to fully-insured Health Maintenance Organization (HMO) plans offered by Kaiser Permanente (Kaiser) and Sutter Health Plus (SHP) and health savings account-qualified high deductible health plans (HDHP) also provided by Kaiser and SHP. The fully-insured plans are not part of this budget.

In 2020, the Consolidated Appropriations Act adopted two fundamental laws that significantly affect health plan administration starting in January 2022 and continuing into 2023: 1) "no surprise" medical billing and 2) medical pricing transparency to include prescription drugs. The County completed its first drug reporting requirements in December 2022. Additionally, out-of-network emergency and air ambulance services must now be covered as part of the Act as if in-network. County staff is working with its third party administrator, pharmacy benefit manager, and health consultant to ensure compliance and timely reporting. These, and other factors, provide a measure of uncertainty for budgeting and plan administration considerations.

Although influencing factors are beyond the County's administrative control, the County strives to use a combination of cost containment measures, vendor contract analysis, industry experts, and reserves to ensure adequately-funded quality programs.

Funding levels and premiums are determined actuarially on an annual basis.

## Major Budget Changes

### Services & Supplies

- (\$113,730) Decrease in Human Resources administrative costs.
- (\$75,000) Decrease in plan documents cost.

### Centrally-Budgeted Expenses

- \$487,435 Cost Allocation Plan adjustment.

### Other Charges

- \$81,874 Increase in Medicare Part D premiums.

# Self-Insurance Internal Service Fund-Health

## General Government

- (\$1,259,000) Decrease in medical claims.
- (\$695,259) Decrease in stop-loss insurance premiums.
- (\$589,008) Decrease in prescription claims.
- (\$70,800) Decrease in administrative fees.

### Revenues

- \$2,865,263 Increase in health insurance premiums from departments.
- \$646,006 Increase in retiree premiums.
- \$500,000 Increase in rebates and refunds.
- (\$1,500,000) Decrease in stop loss recovery.
- (\$749,529) Decrease in employee premiums.

### Program Discussion

The 2023-2024 recommended budget for the Health Insurance program is \$35,321,049, a decrease of \$2,231,038 from the 2022-2023 adjusted budget.

The County operates three self-funded employee health plans and one self-funded retiree plan: Premier, Select/Select-Exclusive, Plan C, and County Managed Care Plan (Retiree), in addition to the fully-insured plan options.

The County purchases excess insurance (stop-loss) to protect against catastrophic claims. Individual deductibles up to \$400,000 per person/ year must be met before reimbursement.

The February 2023 actuarial report identified the following:

- Self-funded health plans must have reserves for catastrophic and Incurred But Not Reported (IBNR) claims. Approximately \$9.27 million is required to meet these obligations.
- The actuary recommends a 5.6% premium increase for all enrollees. The increase for active employees would be 0.9% if not pooled with the retiree population. The increase for retirees, if not pooled with active employees, would be 40.1%. The recommended budget includes the 5.6% premium increase.

Due to the uncertainty of new mandates, rising costs, and the continuing erosion of the self-funded plans’ enrollment, County staff continue to explore options to discontinue or add a self-funded plan more in line with industry-standard benefits and charges.

### Fund Balance

#### Self-Insurance-Health Fund

As of March 31, 2023, the Self-Insurance-Health Internal Service Fund (#38925) had a fund balance of \$15,379,815, which is an increase of approximately \$2.7 million from this same period in 2022.

Employee Participation in County-Offered Plans  
as of March 31, 2023

Health Plan Enrollment	Kaiser	Sutter Health Plus	Self-Insured Plans	Total
Employees				
Enrollments	3,596	540	857	4,993
Percentage	72.0%	10.8%	17.2%	100.0%

# Self-Insurance Internal Service Fund-Dental

## General Government

Jennifer Goodman, *Human Resources Director*  
[www.sjgov.org/departments/hr](http://www.sjgov.org/departments/hr)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$74,530	\$98,437	\$109,491	\$109,491	\$11,054
Centrally-Budgeted Expenses	(3,652)	7,644	68,648	68,648	61,004
Medical And Dental Insur ISF Exp	5,209,195	6,535,342	5,738,008	5,738,008	(797,334)
Total Appropriations	\$5,280,073	\$6,641,423	\$5,916,147	\$5,916,147	(\$725,276)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$19,298	\$30,000	\$20,000	\$20,000	(\$10,000)
Charges For Services	0	300	0	0	(300)
Self-Insurance Revenue	5,414,547	4,498,525	2,707,274	2,707,274	(1,791,251)
Total Revenues	\$5,433,845	\$4,528,825	\$2,727,274	\$2,727,274	(\$1,801,551)
<b>Revenues (Over)/Under Expenses</b>	(\$153,772)	\$2,112,598	\$3,188,873	\$3,188,873	\$1,076,275

- Medical and Dental Insurance ISF Expenses include self-insurance claims paid by the Dental Insurance budget.

## Purpose

The Dental Insurance (#8592600000) budget provides for the centralized administration of the County's self-funded employee dental benefit program.

The County's self-funded insurance programs are designed to provide quality, cost-effective dental benefits to eligible members. In addition to the self-funded dental plan, the County also offers a fully-insured dental plan, which is not included in this budget.

## Major Budget Changes

### Services & Supplies

- \$11,054 Increase in Human Resources administration cost.

### Centrally-Budgeted Expenses

- \$61,004 Cost Allocation Plan adjustment.

### Other Charges

- (\$736,359) Decrease due to reduction in dental claims.
- (\$60,975) Decrease in claims administration based on a percentage of claims expense.

### Revenues

- (\$962,107) Decrease in revenue from County employees.
- (\$829,144) Decrease in revenue from County departments.
- (\$10,000) Decrease in interest income.

## Program Discussion

The 2023-2024 recommended budget for the self-funded dental insurance program is \$5,916,147, which is a decrease of \$725,276 from the 2022-2023 adjusted budget.

The County offers dental plans through two vendors: Delta Dental (self-funded) and United Healthcare (fully-insured). Most employees are enrolled in one of three Delta Dental plans because they offer a more extensive network of

# ***Self-Insurance Internal Service Fund-Dental***

## ***General Government***

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providers. The Delta Dental self-funded plans cover 5,201 employees (94.4%), and the United Healthcare fully-insured plan covers 311 employees (5.6%).

The self-funded plans are administered through Public Risk Innovation, Solutions, and Management (PRISM), formerly the California State Association of Counties Excess Insurance Authority (CSAC EIA). In January 2023, Turner Consulting and Actuarial Services, LLC provided an analysis of the Dental Reserves and Claim Fluctuation Margin. Major findings and recommendations are as follows:

- The reserve for Incurred But Not Reported (IBNR) claims is \$315,957, equal to less than one month of claims expenses, a 1.5% decrease from the previous year.
- Claims decreased in 2022 by 3.9% compared to 2021.

The County's contract with Delta Dental through PRISM ends on June 30, 2023. The County has not been informed of a possible rate change for program administration as of this writing.

## **Fund Balance**

### **Self-Insurance-Dental Fund**

As of March 31, 2023, the Self-Insurance-Dental Internal Service Fund (#38926) had a fund balance of \$5,443,573, a decrease of \$214,899 from the prior year. Reserves are approximately \$5.1 million higher than required.

The County has made numerous attempts over multiple years to decrease the large reserve balance. Beginning in 2017 through 2020, Human Resources held dental rates flat. In 2020-2021, rates were decreased by 5% to further assist in reducing the reserve balance, but due to COVID-19, claims did not materialize as anticipated. In 2021-2022, rates were held flat and did not decrease based on concerns of high utilization due to anticipated postponed dental work, which did not materialize. In 2022-2023, rates decreased by 16.75%.

As a result, the balance of the reserve decreased less than anticipated. For 2023-2024, the County recommends a rate decrease of 40.0% from the 2022-2023 rates, which is anticipated to decrease the fund balance reserve by \$3.2 million.

# Self-Insurance Internal Service Fund-Medical Malpractice

## General Government

Jennifer Goodman, Human Resources Director  
[www.sigov.org/departments/hr](http://www.sigov.org/departments/hr)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$1,504,590	\$2,203,072	\$2,429,713	\$2,429,713	\$226,641
Centrally-Budgeted Expenses	10,888	15,999	86,271	86,271	70,272
Medical And Dental Insur ISF Exp	776,731	1,080,000	1,296,000	1,296,000	216,000
Total Appropriations	\$2,292,209	\$3,299,071	\$3,811,984	\$3,811,984	\$512,913
<b>Earned Revenues By Source</b>					
Interest/Rents	\$12,591	\$40,000	\$30,000	\$30,000	(\$10,000)
Self-Insurance Revenue	2,000,000	3,200,000	4,200,000	4,200,000	1,000,000
Total Revenues	\$2,012,591	\$3,240,000	\$4,230,000	\$4,230,000	\$990,000
<b>Revenues (Over)/Under Expenses</b>	\$279,618	\$59,071	(\$418,016)	(\$418,016)	(\$477,087)

- Medical and Dental Insurance ISF Expenses includes self-insurance claims paid by the Medical Malpractice Insurance budget.

## Purpose

The Medical Malpractice Insurance (#8594800000) budget provides for the centralized administration of the County's self-funded Medical Malpractice Insurance program for various County departments, including San Joaquin General Hospital, Correctional Health Services, Behavioral Health Services, Public Health Services, the Medical Examiner's Office, and County Support to PPH-FQHC.

The County's self-funded insurance programs are designed to provide quality, cost-effective benefits to eligible recipients. Market and legislative factors beyond the County's administrative control frequently influence costs (mandated benefit levels and usage). The County uses a combination of premium adjustments and cost containment measures to ensure adequately-funded programs. Funding levels and premiums are determined actuarially on an annual basis.

## Major Budget Changes

### Services & Supplies

- \$242,000 Increase in excess insurance premiums.
- (\$15,359) Decrease in administrative costs.

### Centrally-Budgeted Expenses

- \$70,272 Cost Allocation Plan adjustment.

### Other Charges

- \$216,000 Increase in medical malpractice claims expense.

### Revenues

- \$1,000,000 Increase in premiums charged to departments.
- (\$10,000) Decrease in interest income.

## Program Discussion

The 2023-2024 recommended budget for the Medical Malpractice program is \$3,811,984, which is an increase of \$512,913 from the 2022-2023 adjusted budget.

The County participates in the Public Risk Innovation, Solutions, and Management (PRISM) medical malpractice program. PRISM was formerly known as the California State Association of Counties Excess Insurance Authority (CSAC EIA). The excess medical malpractice insurance covers \$1.0 million to \$21.5 million, with the County maintaining a \$1.0 million self-insured retention.

# ***Self-Insurance Internal Service Fund-Medical Malpractice***

## **General Government**

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Claims for 2022-2023 through March 31, 2023, include 13 new, 48 current, and 20 closed. The total cost for closed claims was \$8,473,212 for expenses and settlements, with an average cost per claim of \$423,660.

The 2023-2024 excess insurance premium is anticipated to be \$2.0 million, an increase of \$242,000 from 2022-2023.

In December 2022, an actuarial report was completed. Major findings and recommendations are as follows:

By year-end 2022-2023, outstanding liability claims are estimated at \$9.8 million at the 80% confidence level, while program assets are estimated at \$785,000, resulting in a funding deficit of \$9.0 million.

Given the program's funding deficit, the actuary recommends that the County continue implementing a five-year funding plan to bring program assets back to the desired confidence level.

### **Fund Balance**

#### **Self-Insurance-Medical Malpractice Fund**

As of March 31, 2023, the Self-Insurance-Medical Malpractice Internal Service Fund (#38948) had a fund

balance of (\$7,057,932), which represents a decrease of \$3,907,422 from the prior year. Approximately \$3.6 million in excess insurance reimbursements are expected to be received before the fiscal year's end, which will improve the fund balance.

Actions were previously taken to address a funding surplus in the Self-Insurance-Medical Malpractice Internal Service Fund to reduce the balance to the 80% confidence level as outlined by the actuarial report. This included applying a \$2.0 million rebate to departments in May 2019 and reducing department premiums for several fiscal years. At the end of 2022-2023, reserve levels are projected to be in a deficit position, as reported in the December 2022 actuarial report.

Due to the depletion of reserves, a five-year plan includes increasing department premiums to build back program assets.

Based on the actuarial findings and recommendations, the 2023-2024 Medical Malpractice Insurance premium is \$4.2 million. This represents an increase of \$1.0 million in premiums from 2022-2023 and is expected to contribute \$418,016 to the fund balance by the end of 2023-2024.

# Self-Insurance Internal Service Fund-Casualty

## General Government

Jennifer Goodman, **Human Resources Director**  
[www.sjgov.org/departments/hr](http://www.sjgov.org/departments/hr)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$8,153,145	\$9,433,101	\$11,330,450	\$11,330,450	\$1,897,349
Centrally-Budgeted Expenses	448,933	165,113	1,175,688	1,175,688	1,010,575
Other Charges & Uses	132,115	132,115	132,115	132,115	0
Medical And Dental Insur ISF Exp	9,274,844	4,200,000	4,620,000	4,620,000	420,000
Total Expenditures	\$18,009,037	\$13,930,329	\$17,258,253	\$17,258,253	\$3,327,924
Expenditure Reimbursements	(68,440)	0	0	0	0
Total Appropriations	\$17,940,597	\$13,930,329	\$17,258,253	\$17,258,253	\$3,327,924
<b>Earned Revenues By Source</b>					
Interest/Rents	\$12,180	\$0	\$15,000	\$15,000	\$15,000
Self-Insurance Revenue	18,039,966	15,132,115	18,132,115	18,132,115	3,000,000
Total Revenues	\$18,052,146	\$15,132,115	\$18,147,115	\$18,147,115	\$3,015,000
<b>Revenues (Over)/Under Expenses</b>	(\$111,549)	(\$1,201,786)	(\$888,862)	(\$888,862)	\$312,924

- Medical and Dental Insurance ISF Expenses includes self-insurance claims paid by the Casualty Insurance budget.

## Purpose

The Casualty Insurance (#8594900000) budget provides for the centralized administration of the County's self-funded Casualty Insurance program. The County's self-funded Casualty Insurance program consists of three major components: general liability, property, and automobile insurance.

The County's self-funded insurance programs are designed to provide quality, cost-effective benefits to eligible recipients. Market and legislative factors beyond the County's administrative control frequently influence costs (mandated benefit levels and usage). The County uses a combination of premium adjustments and cost containment measures to ensure adequately-funded programs. Funding levels and premiums are determined actuarially on an annual basis.

## Major Budget Changes

### Services & Supplies

- \$1,815,000 Increase in excess insurance premiums.
- \$82,349 Increase in administrative costs.

### Centrally-Budgeted Expenses

- \$1,010,575 Cost Allocation Plan adjustment.

### Other Charges

- \$420,000 Increase in liability claims expenses.

### Revenues

- \$3,000,000 Increase in premiums charged to departments.

## Program Discussion

The 2023-2024 recommended budget for Casualty Insurance is \$17,258,253, which is an increase of \$3,327,924 from the 2022-2023 adjusted budget. There is an unanticipated increase to the Countywide Cost Allocation Plan charges that will be evaluated for future fiscal years.

The 2023-2024 budget includes a program cost of \$16.0 million, an annual Airport settlement reimbursement of \$132,115 related to litigation, which ends in 2029, and a Cost Allocation Plan charge of \$1,175,688.



# **Self-Insurance Internal Service Fund-Casualty**

## **General Government**

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General Liability claims for 2022-2023 through March 31, 2023, include: new, 199; current, 249; and closed 163. The total cost for closed claims was \$9,784,024 for property damage, bodily injury, and reserves, with an average cost per claim of \$60,024.

The County participates in the Public Risk Innovation, Solutions, and Management (PRISM) property and excess liability program. PRISM was formerly the California State Association of Counties' Excess Insurance Authority (CSAC EIA). The excess insurance provides general liability coverage from \$1.0 million to \$25.0 million, with the County maintaining a \$1.0 million self-insured retention. The 2023-2024 excess insurance premium is estimated at \$8.5 million, an increase of \$1.8 million from 2022-2023. The increase is mainly due to insurance markets hardening in response to increased insurance claim costs. This includes the industry's experience with unfavorable development in claim settlement amounts and jury verdicts, causing insurance carriers to be less willing to offer insurance coverage for the more volatile risk exposures.

The Casualty budget funds Risk Management Unit staff that delivers employee health and safety services. On December 15, 2022, the Occupational Safety and Health Standards Board voted to adopt non-emergency COVID-19 prevention regulations. These regulations took effect on February 3, 2023, and will remain until February 3, 2025, except for the recordkeeping subsection that will remain in effect until February 3, 2026. These regulations include some of the requirements found in the COVID-19 Prevention Emergency Temporary Standards (effective 2019-2023). The County Safety Division will continue supporting Departments to meet the California Code of Regulations section 3205: COVID-19 Prevention regulation that requires incorporating §3205 into the Injury and Illness Prevention Program (IIPP). In addition, efforts will continue to educate employees about safety and accident prevention in their work environment. The Departments' assigned Safety and Health Representatives will communicate with employees regarding policies, procedures, and programs to address risks and ensure compliance with the Department's IIPP and other regulations.

Assembly Bill 685 became effective on January 1, 2021. This bill requires employer notice requirements for COVID-19 in the workplace, notification to those potentially exposed (while maintaining employee confidentiality), and a disinfection and safety plan. These activities and more are anticipated to continue through 2023-2024.

In December 2022, an actuarial report was completed. Major findings and recommendations are as follows:

By year-end 2022-2023, outstanding liability claims are estimated at \$25.4 million at the 80% confidence level, while program assets are estimated at \$3.4 million. This results in a funding deficit of \$22.0 million at the 80% confidence level.

The allocation of Casualty insurance is calculated by: 1) using a 7-year loss history, 2) capping the claim loss amount at \$500,000 per claim, and 3) applying an allocation factor of 70% based on experience and 30% based on exposure.

## **Fund Balance**

### **Self-Insurance-Casualty Fund**

As of March 31, 2023, the Self-Insurance-Casualty Internal Service Fund (#38949) had a fund balance of (\$20,249,139), representing a decrease of \$4,161,121 from the prior year. Interest income has decreased to \$0 as the fund's cash balance has decreased.

Actions have been taken to address a past funding surplus in the Self-Insurance-Casualty Internal Service Fund, including reducing department premiums for several fiscal years. Due to the current low reserve levels, a five-year plan includes increasing department premiums to build back program assets.

Based on the actuarial findings and recommendations, the 2023-2024 Casualty Insurance premium is \$18.0 million. This represents an increase of \$3.0 million from 2022-2023 and is expected to contribute \$888,862 to the fund balance by the end of 2023-2024.

# Self-Insurance Internal Service Fund-Casualty

## General Government

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>General Liability Claims</b>					
<i>New</i>	140	175	145	225	190
<i>Current</i>	228	241	236	275	213
<i>Closed</i>	136	224	211	185	170
<i>The average cost for property damage, Bodily injury, and reserves.</i>	\$52,866	\$11,417	\$43,957	\$92,775	\$37,781
<i>Total Cost Per Closed Claim</i>	\$7,189,795	\$2,557,402	\$9,274,842	\$15,029,691	\$6,930,694
<b>Excess Insurance Premium</b>	\$3.5 million	\$4.4 million	\$5.5 million	\$6.7 million	\$8.5 million

# Self-Insurance Internal Service Fund-Workers' Comp.

## General Government

Jennifer Goodman, Human Resources Director  
[www.sigov.org/departments/hr](http://www.sigov.org/departments/hr)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$4,052,001	\$4,738,111	\$5,228,467	\$5,228,467	\$490,356
Centrally-Budgeted Expenses	(270,786)	128,660	1,317,920	1,317,920	1,189,260
Medical And Dental Insur ISF Exp	8,706,686	10,542,416	10,763,688	10,763,688	221,272
Total Expenditures	\$12,487,901	\$15,409,187	\$17,310,075	\$17,310,075	\$1,900,888
Expenditure Reimbursements	0	(500,000)	(500,000)	(500,000)	0
Total Appropriations	\$12,487,901	\$14,909,187	\$16,810,075	\$16,810,075	\$1,900,888
<b>Earned Revenues By Source</b>					
Interest/Rents	\$98,190	\$0	\$125,000	\$125,000	\$125,000
Miscellaneous Revenues	5,913	0	0	0	0
Self-Insurance Revenue	9,793,728	15,000,000	18,000,000	18,000,000	3,000,000
Total Revenues	\$9,897,831	\$15,000,000	\$18,125,000	\$18,125,000	\$3,125,000
Revenues (Over)/Under Expenses	\$2,590,070	(\$90,813)	(\$1,314,925)	(\$1,314,925)	(\$1,224,112)

- Medical and Dental Insurance ISF Expenses includes self-insurance claims paid by the Workers' Compensation Insurance budget.

## Purpose

The Workers' Compensation Insurance (#8595000000) budget provides for the centralized administration of the County's self-funded Workers' Compensation program.

The County's self-funded insurance programs are designed to provide quality, cost-effective benefits to eligible recipients. Market and legislative factors beyond the County's administrative control frequently influence costs (mandated benefit levels and usage). The County uses a combination of premium adjustments and cost containment measures to ensure adequately-funded programs. Funding levels and premiums are determined actuarially on an annual basis.

## Major Budget Changes

### Services & Supplies

- \$550,000 Increase in excess insurance premiums.
- \$150,000 Increase in licenses and permits costs.
- (\$216,644) Decrease in administrative costs.

### Centrally-Budgeted Expenses

- \$1,189,260 Cost Allocation Plan adjustment.

### Other Charges

- \$190,000 Increase in Workers' Compensation claims expense.
- \$31,272 Increase in contractual third-party claim services.

### Revenues

- \$3,000,000 Increase in Workers' Compensation insurance premiums charged to departments.
- \$125,000 Increase in interest income.

# ***Self-Insurance Internal Service Fund-Workers' Comp.***

## ***General Government***

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### **Program Discussion**

The 2023-2024 recommended budget for the Workers' Compensation program totals \$17,310,075, which is an increase of \$1,900,888 from the 2022-2023 adjusted budget. There is an unanticipated increase in Cost Allocation Plan adjustments that will be evaluated for future fiscal years.

Workers' Compensation claims for 2022-2023 through March 31, 2023, include new, 426; current, 529; and closed, 504. The total cost for closed claims was \$9,527,640 for temporary disability and claim expenses, with an average cost per claim of \$18,904.

The Workers' Compensation budget provides funding for Risk Management Unit staff that delivers services related to disability management and the Workers' Compensation programs, as well as continued funding for pre-employment arduous physicals. These areas of responsibility are high volume and demanding, requiring formal analysis and case management. A major area of responsibility during 2022-2023 involved continued COVID-19 support to County departments, employee health guidance documentation, timely implementation, and compliance with regulatory requirements [Assembly Bill 685, California Division of Occupational Safety and Health (Cal/OSHA) Emergency Temporary Standards, Senate Bill 1159, Senate Bill 114, etc.], and guidance on COVID-19 close contacts and positive cases.

Current legislation, Senate Bill 1159 (September 17, 2020), created a rebuttable presumption of compensability for employees who claim they contracted COVID-19 while at work. The Department continues to report to San Joaquin County Public Health and the County's third-party administrator, as required. It is anticipated that these activities may continue through 2023-2024.

Although emergency COVID-19 status is winding down, compliance requirements continue to be in effect to ensure continued prevention, administration of possible presumptive workers' compensation benefits, and mandatory record keeping and reporting.

As of March 31, 2023, 5,420 employees, or approximately 69.0% of the employee population, reported COVID-19 positive results since the beginning of the pandemic. Of the 5,420, 677 filed Workers' Compensation claims, 199 were denied for various reasons, and 478 were accepted. A total of \$2,031,629 was paid (temporary disability, medical expenses,

etc.), with outstanding reserves of \$318,942 (total of \$2,350,571 incurred).

The County participates in the Public Risk Innovation, Solutions, and Management (PRISM) excess insurance program. PRISM was formerly known as the California State Association of Counties Excess Insurance Authority (CSAC EIA) and has a self-insured retention of \$500,000. Funding for this program has generally been at the 80% confidence level. The excess insurance premium is estimated at \$2.8 million, an increase of \$550,000 from 2022-2023.

In December 2022, an actuarial report was completed. Major findings and recommendations are as follows:

- By year-end 2022-2023, outstanding liability claims are estimated at \$45.7 million at the 80% confidence level, while program assets are estimated at \$27.4 million. This results in a funding deficit of \$18.3 million at the 80% confidence level.
- Compared to other PRISM members, San Joaquin County's loss rate is lower than average, reflecting a lower-than-average cost per claim and a lower-than-average number of claims per \$1.0 million of payroll.

### **Fund Balance**

#### **Self-Insurance-Workers' Compensation Fund**

As of March 31, 2023, the Self-Insurance-Workers' Compensation Internal Service Fund (#38950) had a fund balance of (\$8,367,615), which represents an increase of \$1.5 million from the prior year.

- Actions were previously taken to address a funding surplus in the Self-Insurance-Workers' Compensation Internal Service Fund. Actions included reducing department premiums for several fiscal years.
- However, due to the depletion of reserves, a five-year plan includes increasing department premiums to build back program assets.

Based on the actuarial findings and recommendations, the 2023-2024 Workers' Compensation Insurance premium is \$18.0 million. This represents an increase of \$3.0 million from 2022-2023 and is expected to contribute \$1.3 million to the fund balance by the end of 2023-2024.

# Self-Insurance Internal Service Fund-Workers' Comp.

## General Government

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Workers' Compensation Claims</b>					
<i>New</i>	357	245	713	570	550
<i>Current</i>	620	634	566	621	671
<i>Closed</i>	459	572	781	515	500
<i>Average cost for temporary disability and claim expenses.</i>	\$15,796	\$12,680	\$6,474	\$18,447	19,392
<i>Total Cost For Closed Claims</i>	\$7,250,162	\$7,253,150	\$5,056,416	\$9,500,000	\$9,696,000
<b>Excess Insurance Premium</b>	\$1.5 million	\$1.5 million	\$2.0 million	\$2.25 million	\$2.8 million

# Self-Insurance Internal Service Fund-Unemployment

## General Government

Jennifer Goodman, Human Resources Director  
[www.sigov.org/departments/hr](http://www.sigov.org/departments/hr)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$879,784	\$1,263,480	\$1,069,179	\$1,069,179	(\$194,301)
Centrally-Budgeted Expenses	16,976	12,092	48,443	48,443	36,351
Total Appropriations	\$896,760	\$1,275,572	\$1,117,622	\$1,117,622	(\$157,950)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$8,816	\$30,000	\$30,000	\$30,000	\$0
Self-Insurance Revenue	271,998	400,000	1,000,000	1,000,000	600,000
Total Revenues	\$280,814	\$430,000	\$1,030,000	\$1,030,000	\$600,000
Revenues (Over)/Under Expenses	\$615,946	\$845,572	\$87,622	\$87,622	(\$757,950)

## Purpose

The Unemployment Insurance (#8595100000) budget provides for the centralized administration of the County's self-funded Unemployment Insurance program.

The self-funded insurance programs are designed to provide quality, cost-effective benefits to eligible recipients. Market and legislative factors beyond the County's administrative control frequently influence costs (mandated benefit levels and usage). The County uses a combination of premium adjustments and cost containment measures to ensure adequately-funded programs.

## Major Budget Changes

### Services & Supplies

- \$5,699 Increase in administrative costs.
- (\$200,000) Decrease in unemployment claims.

### Centrally-Budgeted Expenses

- \$36,351 Cost Allocation Plan adjustment.

### Revenues

- \$600,000 Increase in premiums charged to departments.

## Program Discussion

The 2023-2024 recommended budget for the Unemployment Insurance program is \$1,117,622, which is a decrease of \$157,950 from the 2022-2023 adjusted budget.

More than halfway through 2022-2023, the County's unemployment claims decreased dramatically due to

COVID-19. For three quarters, 343 unemployment claims have been filed, with approximately 27% related to the COVID-19 pandemic. Unemployment claims for 2022-2023 are projected to reach approximately 607, a decrease from the 2021-2022 level of 803 claims received. It is anticipated that \$1.0 million will be spent on unemployment claims in 2022-2023. Claims are expected to continue to decrease in 2023-2024.

## Fund Balance

### Self-Insurance-Unemployment Fund

As of March 31, 2023, the Self-Insurance-Unemployment Internal Service Fund (#38951) had a fund balance of \$1,900,363, representing a decrease of \$247,932 from the prior year.

Industry standards suggest an appropriate fund balance of approximately \$2.5 million. A rate holiday charged to departments and an above-average number of claims in 2020-2021 resulted in a significantly reduced fund balance. As a result, 0.05% of payroll unemployment was reinstated in 2021-2022 and 2022-2023. The 2023-2024 rate increased to 0.15%, which is appropriate to maintain industry standard levels.

# 1013000000—Registrar of Voters

## General Government

Olivia Hale, Registrar of Voters  
[www.sjgov.org/department/rov](http://www.sjgov.org/department/rov)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,678,489	\$3,140,654	\$3,777,118	\$3,777,118	\$636,464
Services & Supplies	5,659,937	8,379,229	6,736,873	6,736,873	(1,642,356)
Centrally-Budgeted Expenses	2,010,402	1,776,494	2,267,064	2,267,064	490,570
Capital Expenditures	564,087	1,189,311	5,588,937	5,588,937	4,399,626
Total Expenditures	\$10,912,915	\$14,485,688	\$18,369,992	\$18,369,992	\$3,884,304
Expenditure Reimbursements	(31,500)	0	0	0	0
Total Appropriations	\$10,881,415	\$14,485,688	\$18,369,992	\$18,369,992	\$3,884,304
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$3,488,992	\$995,431	\$2,016,937	\$2,016,937	\$1,021,506
Charges For Services	407,300	3,527,280	0	0	(3,527,280)
Miscellaneous Revenues	10,885	10,000	10,000	10,000	0
Operating Transfers In	35,904	3,480,712	3,600,000	3,600,000	119,288
Total Revenues	\$3,943,081	\$8,013,423	\$5,626,937	\$5,626,937	(\$2,386,486)
<b>Net County Cost</b>	\$6,938,334	\$6,472,265	\$12,743,055	\$12,743,055	\$6,270,790
<b>Allocated Positions</b>	20.0	23.0	30.0	30.0	7.0
Temporary (Full-Time Equivalent)	14.9	16.4	12.1	12.1	(4.3)
Total Staffing	34.9	39.4	42.1	42.1	2.7

## Purpose

The Registrar of Voters (ROV) allows San Joaquin County citizens to exercise their constitutional right to vote by conducting impartial, accurate, secure, and accessible elections with integrity. All elections managed by the ROV are fair, transparent, and open to the public. Elections include Federal, State, County, and local district elections within San Joaquin County.

The election management process includes designing precincts, identifying polling places, recruiting election officers, maintaining voter registration records, processing vote-by-mail ballots, interfacing with State and Federal agencies, and conducting voter outreach. The ROV provides voter registration and election information to the public, candidates, campaigns, and news media.

# 1013000000—Registrar of Voters

## General Government

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Formalize Succession Planning	Current	Target	Deadline
➤ Create and implement a succession plan for all subunits of the Registrar of Voters Office.	Four subunits have a succession plan.	Seven subunits have a succession plan.	June 2023
Demonstrate Leadership Development	Current	Target	Deadline
➤ ROV will analyze its entire operation to ensure proper staffing levels and appropriately trained incumbents to provide high-quality election services.	ROV has worked with Human Resources (HR) to determine organizationally appropriate supplemental position requests in the 2023-2024 budget.	ROV will continue to evaluate the Department's performance during the 2024 elections and work with HR to request additional positions and/or training resources as necessary.	June 2025
Augment Digitization and Automation	Current	Target	Deadline
➤ Implement the best voting system for San Joaquin County.	ROV is evaluating all three of the voting systems certified by the State of California.	ROV has fully implemented the voting system before the March 2024 Presidential Primary.	March 2024
➤ Increase the efficiency of the election process to reduce wait times and the number of days required to complete the vote count.	Wait Time – 15 min. Vote Count – 23 days	Wait Time – 10.5 min. Vote Count – 13.8 days	April 2024
➤ Streamline the voting process to ensure a high-level of customer satisfaction.	N/A	90% customer satisfaction	April 2024
Fiscal Optimization			
Proactively Manage Labor Costs	Current	Target	Deadline
➤ Reduce overtime in elections.	\$106,000	Under \$85,000	June 2024
➤ Reduce temporary labor costs.	\$581,000	Under \$300,000	June 2024



# 1013000000—Registrar of Voters

## General Government

### Major Budget Changes

#### Salaries & Employee Benefits

- \$116,442 Salary and benefits adjustments.
- \$311,675 Add four Election Technician/Trainees.
- \$157,826 Add one Elections Manager.
- \$106,908 Add one Administrative Assistant I.
- \$105,128 Add one Geographic Information Systems Specialist I.
- (\$161,515) Decrease in extra-help.

#### Services & Supplies

- \$5,828,342 Increase in special departmental expense for costs associated with the March 2024 Presidential Primary Election.
- \$750,000 Increase due to mobile vote centers and increased security for election drop boxes.
- (\$5,571,446) Decrease in special departmental expense for costs associated with the November 2022 General Election.
- (\$2,420,000) Decrease in surplus appropriations re-budgeted in 2022-2023 for the June 2022 Statewide Primary Election.
- (\$275,000) Decrease in poll worker costs.

#### Centrally-Budgeted Expenses

- \$502,438 Increase in data processing charges.
- \$27,853 Increase in Casualty and Workers' Compensation insurance.
- (\$55,831) Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

- \$5,588,937 New voting system funded by the Voting System Replacement Contract Grant and American Rescue Plan Act (ARPA) funds.

#### Revenues

- \$1,988,937 Increase in Voting System Replacement Contract Grant (#18G30139).
- (\$3,510,280) Decrease in State revenue for June 2022 Statewide Primary Election and November 2022 General Election.
- (\$670,772) Decrease in Voting Modernization Board (VMB) Grant.
- (\$310,659) Decrease in Help America Vote Act (HAVA) Section 301 Grant.

#### Operating Transfers In

- \$3,600,000 Increase in transfer from the ARPA Fund to replace the County's voting system.
- (\$3,410,375) Decrease in transfer from the State Recall Election Fund (#10356).
- (\$70,337) Decrease in transfer from the ROV Election Technology General Fund Special Account (#10355) for VMB Grant match.

### Program Discussion

The 2023-2024 recommended Registrar of Voters (ROV) budget totals \$18,369,992, which is an increase of \$3,884,304 from the 2022-2023 adjusted budget.

The Net County Cost totals \$12,743,055, which is an increase of \$6,270,790 from 2022-2023. ROV's analysis of historically similar elections suggests the Presidential Primary in March 2024 could net the County \$1.1 million in election expense reimbursements. However, the timing of the Presidential Primary means ROV will probably not receive the \$1.1 million before fiscal year 2024-2025.

In 2023-2024, the ROV will focus on the following priorities:

- **Voting System Upgrade** – The ROV has \$5,588,937 available to either purchase a new voting system or upgrade the current voting system. The Board approved a 2nd amendment to the Department's agreement with the State for the Voting System Replacement Grant (Agreement #18G30139) for \$1,988,937 on May 24, 2022, (B-22-253) and allocated \$3.6 million of ARPA funds on October 4, 2022 (B-22-695).

# 1013000000—Registrar of Voters

## General Government

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The County distributed a Request for Proposals on Friday, February 3, and received proposals from all three vendors certified in California: Dominion Voting Systems, Election Systems & Software, and the County's current vendor, Hart InterCivic. Product demonstrations started on March 13 and ended on March 30. The Department expects to bring an item to the Board with a recommended voting system before the end of 2022-2023.

This project will ensure the County has the voting system that best meets the needs of all San Joaquin County voters. ROV expects to purchase and begin implementing the system in 2022-2023 to allow adequate time to complete the project before the March 2024 Presidential Primary. However, ROV has re-budgeted the expenses and offsetting revenue for this purchase in 2023-2024 to allow for any delays.

- **March 5, 2024, Presidential Primary Election** – The ROV will focus on the preparation, planning, and execution of the March 5, 2024, Presidential Primary Election. The Presidential Primary Election will include partisan presidential races by party and all party central committees' contests. These contests are voter-nominated offices where the top two candidates receiving the most votes per contest will appear on the ballot for the 2024 General Election. For nonpartisan offices that appear on the Primary Election ballot, if no candidate receives 50% plus one vote, the top two candidates receiving votes will appear in a run-off contest in the General Election.
- **Continue Enhancement of Election Security** – The ROV will continue to work with the Information Systems Division and the Secretary of State's Office to enhance and improve the County's elections system to ensure the data network remains secure.

During 2022-2023, the ROV accomplished the following activities:

- **Conducted the November 8, 2022, General Election** – The General Election included the contests for Governor, Lieutenant Governor, Attorney General, State Treasurer, Secretary of State, State Controller, Superintendent of Public Instruction, and Insurance Commissioner, as well as other Federal, State, and local County elected positions.
- **Election Security Enhancements**
  1. Submitted a Request for Proposal (RFP) to California-certified voting system vendors to purchase a new voting system using \$1,988,937

from the Voting System Replacement Grant (#18G30139) and \$3.6 million in ARPA funds.

2. Purchased two vote-by-mail ballot sorters and signature verification software to improve the signature validation process and throughput for vote-by-mail ballots.
3. Purchased three additional OPEX vote-by-mail ballot extraction machines and automated date stampers to increase efficiencies.
4. Upgraded Poll Pads (electronic voter rosters) using a grant from the Voting Modernization Board.

## Fund Balance

### ROV Candidate Statements Fund

As of March 31, 2023, the ROV Candidate Statements General Fund Special Account (#10352) had a balance of \$189,048. The 2023-2024 recommended budget does not include any transfers from this fund.

### ROV Election Technology Fund

As of March 31, 2023, the ROV Election Technology General Fund Special Account (#10355) had a balance of \$71,038. The 2023-2024 recommended budget does not include any transfers from this fund.

### ROV State Recall Election Fund

As of March 31, 2023, the ROV State Recall Election General Fund Special Account (#10356) had a balance of \$3,410,375. ROV expects to transfer in the entire fund balance by the end of fiscal year 2022-2023. The 2023-2024 recommended budget does not include any transfers from this fund.

## Supplemental Requests

ROV is requesting supplemental funding totaling \$389,948 for several new positions:

### *Elections Manager*

Funding of \$159,246 is requested for one Elections Manager to supervise the day-to-day activities and election functions within the ROV. As a stand-alone department not under the Information Systems Division (ISD) and no longer using contracted management-level consultants, it is necessary to establish first-level management for the ROV's six subunits.

# 1013000000—Registrar of Voters

## General Government

### Elections Technicians

Funding of \$316,235 is requested for four Elections Technicians to support voter roll maintenance, signature verification, voter outreach, vote-by-mail processing, student mock elections, Americans with Disabilities Act (ADA) polling location surveys, election officer database maintenance, election officer staffing, election officer training, candidate support services, city and district support services, and data entry into the election management system.

### Administrative Assistant I

Funding of \$108,048 is requested for an Administrative Assistant I to provide efficient administrative support functions such as researching and analyzing County policies

and applicable State and Federal laws to determine their impact on the department's operations.

### Geographic Information Systems Specialist I

Funding of \$106,419 is requested for a Geographic Information Systems Specialist I to manage the ROV's operational oversight of mapping activities and the administration of GIS functions related to precincts, voting precincts, redistricting, and districts that request the ROV to administer their elections.

The total cost of these new positions, including one-time and ongoing expenses, is \$689,948. Savings in temporary extra-help and consultant costs will offset these expenses by \$300,000. The recommended budget has been augmented by \$389,948 to address this request.

### Workload Data

	<b>Actual</b>			<b>Est./Act.</b>	<b>Projected</b>
	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>2023-2024</b>
<i>Eligible Voters</i>	468,757	469,771	475,528	509,377	517,000
<i>Registered Voters (Active)</i>	344,470	376,125	383,657	391,725	408,040
<i>Registered Voters (Inactive)</i>	63,254	53,302	53,532	55,953	52,780
<i>Registered Voters (Pending)</i>	100	9,595	4,115	19,573	22,210
<b>Total Registered Voters</b>	<b>407,824</b>	<b>439,022</b>	<b>441,304</b>	<b>467,251</b>	<b>483,030</b>
<i>Newly Registered Voters</i>	31,432	66,715	59,908	25,947	30,890
<i>Countywide Elections</i>	1	1	1	1	1
<i>Total Ballots Cast</i>	150,482*	292,818	310,534*	179,333	213,513
<i>Countywide Precincts</i>	377	207	153*	384	300
<i>Other Elections</i>	1*	0	0*	1	1
<i>Ballots Cast</i>	1893*	0	0*	35	0

\*Restated

# Information Systems Division Internal Service Fund

## General Government

Mark Thomas, Information Systems Director  
[www.sjgov.org/department/isd](http://www.sjgov.org/department/isd)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$15,247,524	\$17,299,742	\$19,739,455	\$19,739,455	\$2,439,713
Services & Supplies	9,736,069	13,447,481	15,204,237	15,204,237	1,756,756
Centrally-Budgeted Expenses	2,096,832	1,399,444	1,905,920	1,905,920	506,476
Capital Expenditures	18,207	2,685,000	3,762,000	3,762,000	1,077,000
Total Expenditures	\$27,098,632	\$34,831,667	\$40,611,612	\$40,611,612	\$5,779,945
Expenditure Reimbursements	(80,000)	0	0	0	0
Total Appropriations	\$27,018,632	\$34,831,667	\$40,611,612	\$40,611,612	\$5,779,945
<b>Earned Revenues By Source</b>					
Interest/Rents	\$19,414	\$22,280	\$59,706	\$59,706	\$37,426
Charges For Services	25,732,600	28,127,662	32,305,801	32,305,801	4,178,139
Miscellaneous Revenues	1,183	0	0	0	0
Operating Transfers In	3,215,500	4,806,225	6,262,000	6,262,000	1,455,775
Total Revenues	\$28,968,697	\$32,956,167	\$38,627,507	\$38,627,507	\$5,671,340
<b>Revenues (Over)/Under Expenses</b>	(\$1,950,065)	\$1,875,500	\$1,984,105	\$1,984,105	\$108,605
<b>Allocated Positions</b>	88.0	92.0	99.0	99.0	7.0

- Operating Transfers In includes a General Fund Contribution of \$1,362,000 provided by Tobacco Settlement funds for 2023-2024.

## Purpose

The Information Systems Division (ISD) Internal Service Fund (ISF) (#8240000000) provides information processing services, support, and coordination to County departments. The Division is responsible for the County's information technology and communications functions. ISD's mission is to "support technology solutions that create opportunities to transform the way service is brought to the public through leading, integrating, partnering, educating, consulting, and supporting."

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve office vacancy rate.	18% as of July, 2022	5%	June 2024

# Information Systems Division Internal Service Fund

## General Government

Augment Digitization and Automation	Current	Target	Deadline
➤ Implement departmental voucher scanning functionality.	San Joaquin General Hospital is only department submitting electronically.	All County departments submitting electronically.	June 2024
➤ Implement electronic vendor payments.	Limited instances of manually processed wires.	Electronic (ACH) payments to all requesting vendors.	June 2024
➤ Configure Laserfiche and increase storage to support departmental scanning and archiving projects.	25 TB	35 TB	December 2025
<b>Fiscal Optimization</b>			
Proactively Manage Labor Costs	Current	Target	Deadline
➤ Implement Electronic Timekeeping Clocks at San Joaquin General Hospital.	Staff report time worked using paper timesheets.	100% of staff report time electronically or with electronic clocks.	December 2024

### Major Budget Changes

#### Salaries & Employee Benefits

- \$1,377,249 Salary and benefits adjustments.
- \$770,226 Add four Information Systems Analysts (ISA) I-IV to support the Human Services Agency and one additional ISA I-IV to support multiple departments.
- \$492,021 Transfer two Information Systems Specialists III and one ISA I-III from the Telephone ISF (#38026).
- \$34,783 Convert one Administrative Assistant II to a Business Analyst II.
- (\$234,566) Transfer one Department ISA IV to Behavioral Health Services (#4040700000).

#### Services & Supplies

- \$1,174,488 Increase in software and license costs.
- \$530,593 Increase in costs for the Accela Digital Permitting and Licensing System.

- \$351,731 Increase in professional services for approved supplemental requests.

- \$20,225 Increase in cost for KnowBe4 security awareness training.

- (\$230,073) Decrease in equipment and software maintenance costs.

- (\$49,487) Decrease in Telephone ISF charges for AT&T and Cisco wide-area network and Smart Net.

- (\$33,721) Decrease in costs for Leadership Workshop Memberships.

#### Centrally-Budgeted Expenses

- \$64,590 Increase in automation equipment lease costs.
- \$24,530 Increase in Casualty insurance costs.
- \$409,569 Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

- \$2,500,000 Enterprise Access Control Project.
- \$850,000 Disaster Recovery Infrastructure upgrade.

# Information Systems Division Internal Service Fund

## General Government

- \$250,000 Robotic Process Automation Project.
- \$162,000 Infrastructure upgrades.

### Revenues

- \$2,617,684 Increase in revenue from user departments.
- \$1,562,043 Increase in revenue from direct charges.
- \$37,426 Increase in interest income.

### Operating Transfers In

- \$2,400,000 Increase in transfer from the General Fund (#10001) for supplemental requests.
- (\$461,225) Decrease in transfer from the County Systems Automation Reserve Fund (#10130).
- (\$385,000) Decrease in transfer from the Contingency Provision budget (#1019000000) for the Budget System Replacement project.
- (\$98,000) Decrease in transfer from the Tobacco Settlement Fund (#10116). The Telephone ISF is receiving \$98,000 for the Software as a Service Telecom Pilot project.

## Program Discussion

The 2023-2024 recommended budget for the Information Systems Division (ISD) Internal Service Fund (ISF) totals \$40,611,612, which is an increase of \$5,779,945 from the 2022-2023 adjusted budget. The budget includes projects funded by Tobacco Settlement revenue totaling \$1,362,000.

In 2023-2024, ISD will focus on implementing projects consistent with the Board of Supervisors' Strategic Priorities, as well as San Joaquin County's Digital Services Strategy.

During 2023-2024, ISD intends to:

- **Enhance the PeopleSoft Financials System** – ISD will:
  1. Implement electronic scanning of invoices, receipts, and other documents to support

electronic submission of vouchers to the Auditor-Controller by all departments.

2. Configure payment processing to enable electronic (ACH) payments to all requesting vendors.
3. Implement electronic time clocks at San Joaquin General Hospital (SJGH) to enable staff to report time worked electronically and eliminate the use of paper timesheets.

- **Replace the Local Area Warrant System (LAWS)**– In partnership with the Sheriff's Office and local agencies, ISD will replace LAWS with a cloud-hosted system. The new system will allow ISD to retire legacy infrastructure and improve the cybersecurity and resiliency of the LAWS service. ISD will complete this project by December 2024.

- **Upgrade the Jail Management System** – ISD will upgrade the Jail Management System to the latest version and migrate the service to a cloud hosting provider. This project will allow the Sheriff's Office to make use of the Jail Management System's functional enhancements, provide an updated user interface, and improve system performance and service levels.

- **Replace the Access Management System in Multiple County Facilities** – ISD will replace the access management systems in the County Administration, Agricultural Center, and Human Services Agency buildings. These systems will comprise a single Enterprise Access Management system which will enable centralized management and monitoring of building access.

- **Implement new Enterprise Work Order and Case Management Systems to Digitize Processes in Multiple County Departments** – ISD will complete the implementation of a new Enterprise Service Management System to better manage and monitor service delivery in ISD, Human Resources, General Services, and SJGH.

- **Implement Network, Communications, and Security Systems for the 6 S. El Dorado Capital Project** – In partnership with General Services, ISD will implement local area network, communications, access control, and video systems in the 6 S. El Dorado building. ISD and General Services expect to complete this project by December 2024.

During 2022-2023, ISD accomplished the following activities in partnership with County departments:

# Information Systems Division Internal Service Fund

## General Government

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- **Upgraded the PeopleSoft Financials System** – ISD upgraded the PeopleSoft Financials system to the latest version available from Oracle and upgraded the underlying infrastructure that supports the system.
- **Completed Enhancements to the PeopleSoft Financials and Human Capital Management Systems:**
  1. ISD, Human Resources, and SJGH worked together to complete a detailed analysis of labor agreements and create a set of pay rules to automate in PeopleSoft's Time and Labor module.
  2. SJGH contracted to implement an electronic time clock system that will interface with PeopleSoft's Payroll Module. ISD expects to complete this project by December 2024.
- **Developed an Enterprise Resource Planning (ERP) System Strategy** – The PeopleSoft Governance Committee, with representatives from the County Administrator, Auditor-Controller, Human Resources, ISD, and other stakeholder departments, developed an ERP System Strategy to present to the Board at the end of 2022-2023.
- **Expanded and Enhanced Technology Solutions for the County's Law and Justice Departments** – ISD accomplished the following to improve the technologies that support the County's law and justice departments:
  1. Issued a Request for Proposal to identify qualified vendors able to replace the LAWS. Contingent on a successful selection, ISD will begin the implementation in 2023-2024.
  2. Contracted with a vendor to upgrade the Jail Management System to the latest version and migrate the service to a cloud hosting provider.
- **Upgraded and Enhanced the Physical Security and Audio-Visual Systems in Several County Facilities** – In partnership with the General Services Department, ISD:
  1. Contracted with a vendor to implement an Enterprise Access Management System to replace multiple stand-alone security systems that have reached or will soon reach their end-of-support dates.
  2. Upgraded the video management system in the County Administration Building to high-definition cameras and increased the system's archive capacity to support increased video storage requirements.
- **Implemented New Enterprise Work Order and Case Management Systems to Digitize Processes in Multiple County Departments** – To improve resident and internal customer experience, ISD:
  1. Replaced a collection of standalone systems with a new Enterprise Digital Permitting system to support the business licensing and permitting processes in the Community Development, Environmental Health, Public Works, and Treasurer-Tax Collector Departments.
  2. Began the implementation of a new Enterprise Service Management System to better manage and monitor service delivery in ISD, Human Resources, General Services, and SJGH. ISD expects to complete this project by June 2024.
- **Continued to Improve Security for the County's Critical Data and Technology Infrastructure** – To further develop the County's cybersecurity defenses and implement the County's Cybersecurity Strategy, ISD:
  1. Expanded the application of multi-factor authentication (MFA) to additional departments and systems. MFA significantly reduces the risk of stolen passwords being exploited.
  2. Implemented a Security Information and Event Management (SIEM) system and a 24 hours a day, 7 days a week Network Operations Center (NOC) to aggregate, monitor, and alert on cybersecurity events reported by County security systems.
- **Provided Technical Input for Construction and Renovation Capital Projects** – ISD provided input and support on technology needs for the 6 S. El Dorado Tenant Improvement project and the Behavioral Health Services Adult Residential Treatment Facility project.

## Fund Balance

### County Systems Automation Reserve Fund

As of March 31, 2023, the County Systems Automation Reserve Fund (#10130) had a balance of \$3,133,671. ISD uses the Fund for system upgrades. The 2023-2024 recommended budget includes \$2,500,000 in funding to be used for an Enterprise Access Control System.

The 2023-2024 budget also includes a request to transfer \$4,090,000 from General Fund balance (#10001) to support future projects.

# Information Systems Division Internal Service Fund

## General Government

### Information Systems Division Internal Service Fund

As of March 31, 2023, the ISD ISF (#38024) had a balance of \$7,101,083. The 2023-2024 recommended budget includes \$1,984,105 of fund balance to complete the Digital Permitting System implementation. It also contains several projects funded by Tobacco Settlement Transfers in fiscal year 2022-2023.

### Supplemental Requests

ISD is requesting \$2,400,000 of supplemental funding for the following projects:

#### *Disaster Recovery (DR) Infrastructure Upgrade*

Funding of \$850,000 is requested to increase the capacity of the County's DR infrastructure and support the recovery of a wider array of County information systems and applications. ISD maintains the DR facility to provide for the recovery of essential information systems in the event a natural or man-made disaster affects the County's primary data center.

#### *PeopleSoft Human Capital Management System Upgrade*

Funding of \$800,000 is requested to upgrade the PeopleSoft Human Capital Management system to the latest version available from Oracle and upgrade the underlying infrastructure that supports the system. This upgrade project will support the ongoing maintenance and cybersecurity needs of the system.

#### *Adult Probation System Replacement*

Funding of \$750,000 is requested to select and implement a new cloud-hosted Adult Probation System that will integrate with County Court and other County law and justice systems.

The recommended budget has been augmented by \$2,400,000 to address these requests.

### Future Projects

ISD is requesting a transfer of \$4,090,000 from General Fund balance (#10001) to the County Systems Automation Reserve Fund (#10130) in 2023-2024 to support these projects scheduled in 2024-2025 and 2025-2026:

#### *Network Switch Replacement*

Funding of \$3,325,000 is requested to complete the replacement of core network switches in the County Administration Building, Agricultural Center, Probation, Public Health Services, Sheriff's Office, and Public Works facilities.

#### *Disaster Recovery (DR) Infrastructure Upgrade*

Funding of \$400,000 is requested to complete the upgrade to the County's DR infrastructure.

#### *Adult Probation System Replacement*

Funding of \$250,000 is requested to complete the implementation of a new cloud-hosted Adult Probation System.

#### *Firewall Refresh*

Funding of \$115,000 is requested to complete the replacement of departmental network firewalls that have reached the end of their service life.

Appropriations for these projects, and a corresponding transfer from the County Systems Automation Reserve Fund (#10130), will be included in the recommended budget for the year in which they are scheduled.

### Workload Data

	<u>Actual</u>			<u>Est./Act.</u>	<u>Projected</u>
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Systems, Programming, &amp; Desktop Computer Labor Hours</b>	28,482	29,247	26,407	23,456	22,972
<b>Support Tickets</b>					
<i>Law &amp; Justice Applications</i>	1,793	1,524	1,475	1,356	1,300
<i>Administration Applications</i>	19,093	18,974	21,825	20,174	21,000
<i>Hardware</i>	1,687	1,809	1,265	1,044	1,100



# Office Automation Internal Service Fund

## General Government

Mark Thomas, Information Systems Director

[www.sjgov.org/department/isd](http://www.sjgov.org/department/isd)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$1,848,703	\$3,673,118	\$3,823,364	\$3,823,364	\$150,246
Centrally-Budgeted Expenses	170,138	148,457	129,543	129,543	(18,914)
Capital Expenditures	0	4,673,447	672,812	672,812	(4,000,635)
Operating Transfers Out	0	0	3,800,000	3,800,000	3,800,000
Total Appropriations	\$2,018,841	\$8,495,022	\$8,425,719	\$8,425,719	(\$69,303)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$9,412	\$3,860	\$4,423	\$4,423	\$563
Operating Transfers In	6,523,447	0	0	0	0
MP-TEL-RAD-PUR Revenue	1,965,609	1,967,715	2,357,868	2,357,868	390,153
Total Revenues	\$8,498,468	\$1,971,575	\$2,362,291	\$2,362,291	\$390,716
<b>Revenues (Over)/Under Expenses</b>	(\$6,479,627)	\$6,523,447	\$6,063,428	\$6,063,428	(\$460,019)

- MP-TEL-RAD-PUR revenue includes charges to user departments for Office Automation operating costs.

## Purpose

The Office Automation Internal Service Fund (ISF) (#8250000000) provides a mechanism to distribute and manage desktop and server technology costs, establishes an ongoing funding source to improve fiscal planning, and increases the County's responsiveness to rapid changes in technological opportunities. Currently, the Office Automation ISF funds 3,072 of the County's technology devices. The Information Systems Division (ISD) coordinates the program. Benefits to the organization from the Office Automation ISF include:

- Consolidating technology purchasing, which leverages the County's buying power and results in discounts for bulk purchases of computer equipment.
- Centralizing the administrative functions of placing orders and arranging delivery.
- Helping departments plan and configure technology to maximize its value and effectiveness while maintaining Countywide standards.
- Advising departments on necessary hardware and software issues, such as virus protection and network connectivity.
- Scheduling and coordinating timely system upgrades to provide optimum service. Ensuring departments remain ahead of the demand for computing resources. Personal Computer (PC) hardware is currently on a four-year replacement cycle.

## Major Budget Changes

- (\$36,583) Decrease in professional services related to completed ARPA projects.

### Services & Supplies

- \$409,630 Increase in finance payments to replace computer and technology equipment.
- (\$122,670) Decrease in software and license expenses related to completed American Rescue Plan Act (ARPA) projects.

### Centrally-Budgeted Expenses

- (\$1,392) Decrease in data processing charges.
- (\$17,516) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$442,812 Cisco UCS Cluster.

# Office Automation Internal Service Fund

## General Government

- \$120,000      Brocade Storage Switches.
- \$110,000      Remote participation audio-visual upgrade at the Agricultural Center.

### Operating Transfers Out

- \$3,800,000      Increase in transfer to Radio ISF (#38027) for public safety radio system upgrades.

### Revenues

- \$390,153      Increase in revenue from user departments.

## Program Discussion

The 2023-2024 recommended budget for the Office Automation Internal Service Fund (ISF) totals \$8,425,719, which is a decrease of \$69,303 from the 2022-2023 adjusted budget.

During 2022-2023, the Office Automation ISF replaced 692 aging County devices (PCs, servers, printers, and other computing devices).

On October 26, 2021, the Board of Supervisors authorized the transfer of \$6,523,447 in American Rescue Plan Act (ARPA) funds into the Office Automation ISF to cover the cost of ARPA-funded technology and infrastructure projects scheduled in 2022-2023 and beyond (B-21-645).

ISD will use ARPA funds through fiscal year 2025-2026 to support the following projects:

- Implement an enterprise service management system to process work requests in multiple County departments.
- Update the County’s disaster recovery and business continuity plans.

- Modernize ISD’s compute and storage infrastructure in its primary data center.
- Consolidate and modernize the County’s disparate telephony systems with a cloud-hosted solution.
- Perform a Health Insurance Portability and Accountability Act gap analysis to evaluate the compliance programs in County departments that process protected health information.
- Implement a robotic process automation system to automate routine business processes in multiple County departments.

ISD will transfer \$3,800,000 in ARPA funds from the Office Automation ISF (#38025) to the Radio ISF (#38027) in 2023-2024 to support upgrades to the public safety and local government radio systems.

The Office Automation ISF will continue to support departments as they replace obsolete computer equipment. ISD plans to replace 727 PCs and 22 Mobile Data Computers in Sheriff’s Office and Probation vehicles in 2023-2024.

To minimize costs, ISD will continue to encourage departmental participation in the PC Replacement Program to leverage its buying power and realize discounts for bulk purchases.

## Fund Balance

### Office Automation ISF

User departments fully reimburse the Office Automation ISF budget for services rendered. As of March 31, 2023, the Office Automation ISF (#38025) had a fund balance of \$6,217,498, of which \$6,063,428 are unspent ARPA funds, and \$154,070 serves as the working capital for operating the ISF. The 2023-2024 Recommended Budget includes \$2,263,428 for ARPA-related projects and a transfer of \$3,800,000 to the Radio ISF to support upgrades to the public safety and local government radio systems.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Installation of Replacement Computers	633	493	321	692	727
Installation of New Computers Purchased by Departments	120	57	267	65	0
Purchase of Sheriff and Probation Mobile Data Computers	22	146	18	7	22

# Telephone Internal Service Fund

## General Government

Mark Thomas, Information Systems Director  
[www.sjgov.org/department/isd](http://www.sjgov.org/department/isd)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,398,795	\$1,318,828	\$909,776	\$909,776	(\$409,052)
Services & Supplies	3,658,282	4,009,305	4,250,958	4,250,958	241,653
Centrally-Budgeted Expenses	299,882	373,423	1,083,468	1,083,468	710,045
Capital Expenditures	0	0	960,000	960,000	960,000
Total Expenditures	\$5,356,959	\$5,701,556	\$7,204,202	\$7,204,202	\$1,502,646
Expenditure Reimbursements	(9,000)	0	0	0	0
Total Appropriations	\$5,347,959	\$5,701,556	\$7,204,202	\$7,204,202	\$1,502,646
<b>Earned Revenues By Source</b>					
Interest/Rents	\$4,086	\$4,567	\$8,000	\$8,000	\$3,433
Operating Transfers In	0	0	1,058,000	1,058,000	1,058,000
MP-TEL-RAD-PUR Revenue	4,773,732	5,696,989	6,138,202	6,138,202	441,213
Total Revenues	\$4,777,818	\$5,701,556	\$7,204,202	\$7,204,202	\$1,502,646
<b>Revenues (Over)/Under Expenses</b>	\$570,141	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	10.0	8.0	5.0	5.0	(3.0)

## Purpose

The Telephone Internal Service Fund (ISF) (#8260000000) consolidates the cost of operating and maintaining the County's central telephone system. Services provided include telephone, voice mail, long distance, call routing, data communications, Internet access, remote access, virtual private network, video communications, fiber optics, and data cabling installation.

## Major Budget Changes

### Salaries & Employee Benefits

- \$82,969 Salary and benefits adjustments.
- (\$255,254) Transfer two Information Systems Specialist III positions to the ISD ISF budget (#8240000000).
- (\$236,767) Transfer one Information Systems Analyst III position to the ISD ISF budget (#8240000000).

### Services & Supplies

- \$252,220 Increase in circuits for various departments.

- \$163,807 Increase in professional services to support several projects, including the Software as a Service (SaaS) Telecommunications Pilot, Voice over Internet Protocol (VoIP) implementations, and Wi-Fi infrastructure improvements.
- \$114,964 Increase in the cost of software maintenance and licenses.
- \$44,890 Increase in the cost of the main telephone bill.
- (\$159,991) Decrease in the cost of Cisco Smartnet, VoIP licenses, and Singlewire panic buttons.

# Telephone Internal Service Fund

## General Government

- (\$132,227) Decrease in equipment leases.
- (\$30,000) Decrease in surveillance equipment and wiring services.

### Centrally-Budgeted Expenses

- \$712,723 Increase in data processing charges.

### Capital Expenditures - Equipment

- \$675,000 Network Switch Upgrade.
- \$285,000 Firewall Refresh.

### Revenues

- \$708,284 Increase in revenue from user departments for department-specific projects, and anticipated growth in telephone line and internet charges.
- (\$45,265) Decrease in revenue for local and long-distance calls.

### Operating Transfers In

- \$960,000 Increase in transfer from the General Fund (#10001) for supplemental requests.
- \$98,000 Increase in transfer from the Tobacco Settlement Trust Fund (#10116) for the SaaS Telecommunications Pilot.

## Program Discussion

The 2023-2024 recommended budget for the Telephone Internal Service Fund (ISF) totals \$7,204,202, which is an increase of \$1,502,646 from the 2022-2023 adjusted budget.

The Information Systems Division (ISD) primarily recovers the cost of Telephone ISF services through charges to departments.

Services	Cost
<b>Operating Expense</b>	<b>\$2,538,443</b>
<i>Salary and benefits for communications staff, equipment maintenance, and overhead.</i>	
<b>Centrex Line Rate</b>	<b>\$635,706</b>
<i>Monthly contract costs for Centrex telephone service.</i>	
<b>VoIP Line Rate</b>	<b>\$1,255,291</b>
<i>Monthly costs for VoIP telephone service.</i>	

Services	Cost
<b>Department-Specific Expense</b>	<b>\$1,208,706</b>
<i>Charges based on actual usage by County departments for long distance, local toll calls, local calls, data circuit charges, data wiring, and maintenance costs for all routers and switches.</i>	
<b>Centrex Voice Mail</b>	<b>\$36,352</b>
<i>Charges specific to Centrex voice mail services provided to departments.</i>	
<b>VoIP Voice Mail</b>	<b>\$101,980</b>
<i>Charges specific to VoIP voice mail services provided to departments.</i>	
<b>Internet</b>	<b>\$361,724</b>
<i>Charges specific to internet access and usage provided to departments.</i>	

The following rates apply for 2023-2024 Telephone ISF services:

Services	Monthly Cost Per Line		
	2022-2023	2023-2024	Change
<b>Line Rate</b>			
<i>Centrex Telephone</i>	\$51.38	\$55.88	\$4.50
<i>VoIP Telephone</i>	\$36.13	\$36.81	\$0.68
<b>Mail Box</b>			
<i>Centrex Voice</i>	\$12.32	\$11.83	(\$0.49)
<i>VoIP Voice</i>	\$1.96	\$1.74	(\$0.22)
<b>Internet</b>	\$3.78	\$5.10	\$1.32

Changes in the manufacturer's licensing model have caused increases in the VoIP Line Rate and VoIP Voice Mail Rate.

### 2022-2023 Accomplishments

- **Performed an Assessment of the County's VoIP System** – ISD assessed the County's current VoIP telecommunications system and developed short-term and long-term plans to take full advantage of the features and functionality available within the system. ISD implemented a set of best practices to improve system functionality.
- **Built Resiliency into the County's Wide-Area Network** – ISD built resiliency into the County's Wide-Area Network by installing secondary data circuits and SDWAN equipment at the French Camp location. ISD installed secondary data circuits at the Hazelton Complex.

# Telephone Internal Service Fund

## General Government

### 2023-2024 Major Projects

- **Pilot a Software as a Service (SaaS) Telecommunications System** – ISD will evaluate and select a SaaS telecommunications vendor and conduct a pilot. If the pilot is successful, ISD will conduct a procurement for a new telecommunications system. The new system will improve resiliency, support increased mobility, integrate with the County’s desktop and audio-visual conferencing systems, and provide advanced call center functionality.
- **Upgrade County Internet Access and Wide-Area Networks** – ISD will increase the capacity of the network circuits and equipment that provide Internet access to County departments.
- **Build Resiliency into the County’s Wide-Area Network** – ISD will install secondary circuits and Software-Defined Wide-Area Network (SDWAN) equipment at the Agricultural Center to increase the resiliency of the wide-area network for multiple County departments. ISD will complete the Hazelton Complex project, which began in 2022-2023, by installing SDWAN equipment.

### Fund Balance

#### Telephone ISF

User departments fully reimburse the Telephone ISF budget for services rendered. As of March 31, 2023, the Telephone ISF (#38026) had a fund balance of \$1,256,241, which serves as working capital for the various programs and operations under the ISF. No fund balance is designated for use in the 2023-2024 recommended budget.

### Supplemental Requests

ISD is requesting \$960,000 of supplemental funding to support the following projects:

#### Network Switch Replacement

\$675,000 to replace the core network switches in the County Administration Building, the Agricultural Center, Probation, Public Health Services, and Public Works facilities.

#### Firewall Refresh

\$285,000 to replace departmental network firewalls that have reached the end of their service lives.

The recommended budget has been augmented by \$960,000 to address these requests.

### Workload Data

	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021	2021-2022		
<i>Repairs (Trouble Reports)</i>	317	1,004	1,356	333	300
<i>Telephone Moves &amp; Changes (Number of Station Equipment/Sets)</i>	2,112	1,946	1,207	2,314	2,300
<i>Voice Mail (Orders/Changes/Programs)</i>	564	590	756	1,157	1,100
<i>Data Network Wiring Terminations</i>	0	246	880	825	800
<i>Bldg Security Access Requests &amp; Changes</i>	549	590	508	458	300
<i>Remote Worker Support</i>	N/A*	1,181	771	439	400
<i>Work Orders (Processed &amp; Completed)</i>	3,552	4,194	5,378	5,525	5,200

\*Data not available prior to the COVID-19 pandemic.

# Radio Internal Service Fund

## General Government

Mark Thomas, *Information Systems Director*  
[www.sjgov.org/department/isd](http://www.sjgov.org/department/isd)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$2,608,096	\$3,126,700	\$3,720,416	\$3,720,416	\$593,716
Centrally-Budgeted Expenses	242,010	443,122	465,452	465,452	22,330
Capital Expenditures	0	0	4,050,000	4,050,000	4,050,000
Total Appropriations	\$2,850,106	\$3,569,822	\$8,235,868	\$8,235,868	\$4,666,046
<b>Earned Revenues By Source</b>					
Interest/Rents	\$1,993	\$3,600	\$3,760	\$3,760	\$160
Miscellaneous Revenues	38	0	0	0	0
Operating Transfers In	0	0	3,800,000	3,800,000	3,800,000
MP-TEL-RAD-PUR Revenue	2,854,378	3,566,222	4,182,108	4,182,108	615,886
Total Revenues	\$2,856,409	\$3,569,822	\$7,985,868	\$7,985,868	\$4,416,046
<b>Revenues (Over)/Under Expenses</b>	(\$6,303)	\$0	\$250,000	\$250,000	\$250,000

- MP-TEL-RAD-PUR revenue includes charges to user departments for Radio operating costs.

## Purpose

The Radio Internal Service Fund (ISF) (#8270000000) exists to centralize administrative and operating costs of the County's radio communications system. Charges to user departments recover the ISF's administrative and operating costs.

## Major Budget Changes

### Services & Supplies

- \$251,747 Increase in radio maintenance and equipment costs.
- \$161,277 Increase in finance payments for radios.
- \$73,330 Increase in product-level support, hardware replacement, firmware updates, and software updates.
- \$66,715 Increase in administrative charges for staff support from the Telephone ISF.
- \$23,705 Increase in the cost of Multi-Protocol Label Switching data circuits.
- \$12,012 Increase in radio tower site costs.

### Centrally-Budgeted Expenses

- \$31,732 Increase in data processing charges.
- (\$9,249) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$2,500,000 Sheriff's Custody and San Joaquin General Hospital (SJGH) radio equipment.
- \$1,000,000 Local government and interoperable radio equipment.

### Capital Expenditures - Structures and Improvements

- \$300,000 Thornton radio shelter replacement.
- \$250,000 Mt. Oso radio shelter replacement.

### Revenues

- \$615,886 Increase in charges to user departments.

# Radio Internal Service Fund

## General Government

### Operating Transfers In

- \$3,800,000 Increase in transfer from the Office Automation ISF (#38025) to utilize ARPA funds received in 2022-2023 for public safety radio system upgrades.

### Program Discussion

The 2023-2024 recommended budget for the Radio ISF totals \$8,235,868, which is an increase of \$4,666,046 from the 2022-2023 adjusted budget.

During 2023-2024, departments have an operational need for a modest number of new radios and the replacement of radio equipment seven years or older. The equipment to be purchased is consistent with the technologies identified in the County's Master Radio Communications Plan. Below is a list of radio equipment recommended for purchase in 2023-2024 and associated costs.

Department	Equipment	Costs
<b>District Attorney</b>	28 portables	\$37,156
<b>Environmental Health</b>	9 portables	14,727
<b>Probation</b>		
AB109 HRU	2 portables	2,588
AB109 VCU	2 portables	2,588
AB109 Admin	1 portable	1,294
LCC AB109-IPU	1 portable	1,294
AB118 ELEAS COPS	3 portables	3,882
JJP POOC		
AB118 ELEAS COPS	4 portables	5,176
JJP Recon		
Administration	1 portable	1,294
Adult	12 portables	15,528
Juvenile YOBG	5 portables	6,470
Juvenile JPCF	1 portable	1,294
Juvenile	6 portables	7,764
Juvenile Detention	18 portables	23,292
SB 678 DRC	9 portables	11,646
<b>Public Works</b>		
Road Maintenance	2 desk remotes	954
<b>Sheriff</b>		
Boating Safety	6 portables	11,790
Custody	42 mobiles	54,348
Detectives	4 portables	5,176
Patrol	14 portables	18,116
	3 mobiles	5,280
Special Services Div	1 portable	1,294
	<b>Total</b>	<b>\$232,951</b>

During 2022-2023, the Information Systems Division (ISD) Communications Division focused on the following projects:

- **Encrypt the Sheriff's Radio Channels** – Though supply chain and labor constraints delayed the start of the project, ISD procured equipment and services to encrypt the Sheriff's radio channels.
- **Upgrade and Expand the Capacity of Radio Channels and Equipment** – ISD and Purchasing and Support Services issued Requests for Proposals (RFPs) for equipment to replace the Sheriff's Custody Channel, Interoperability Channel, and SJGH Radio Systems. ISD anticipates awarding contracts by the end of October 2023.
- **Replace the Shelters Housing Radio Systems** – ISD and the General Services Departments initiated capital projects to replace the radio shelters at the Mt. Oso and Thornton locations.

During 2023-2024, ISD intends to:

- **Encrypt the Sheriff's Radio Channels** – ISD will complete the encryption of the Sheriff's radio channels and work with the Sheriff's Office and local agencies to ensure interoperability among all agencies. This project is scheduled to be completed by June 2024.
- **Upgrade and Expand the Capacity of the Sheriff's Custody Channel, Interoperability Channel, and SJGH Radio Equipment** – ISD plans to complete this project before the end of December 2024. ARPA funds totaling \$3,500,000 will support these capital expenditures.
- **Replace the Shelters Housing Radio Systems** – ISD and the General Services Department will replace two aging radio shelters to protect equipment at the Mt. Oso and Thornton locations from potential weather and flood damage. This project is scheduled to be completed by June 2024. ARPA funds totaling \$300,000 will support the new radio shelter in Thornton. The Mt. Oso project will use the existing fund balance in the Radio ISF.

### Fund Balance

#### Radio Internal Service Fund

User departments reimburse the Radio ISF budget for the cost of services rendered. As of March 31, 2023, the Radio ISF (#38027) had a fund balance of \$685,181, which serves as the working capital for various programs and operations under the ISF. In 2023-2024, ISD anticipates spending \$250,000 of the fund balance for the radio shelter replacement project at Mt. Oso.



# 1015400000—Economic Promotion

## General Government

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$254,310	\$523,409	\$310,000	\$310,000	(\$213,409)
<i>Other Charges &amp; Uses</i>	235,042	354,361	455,000	455,000	100,639
<i>Total Appropriations</i>	\$489,352	\$877,770	\$765,000	\$765,000	(\$112,770)
<b>Earned Revenues By Source</b>					
<i>Taxes</i>	\$980,008	\$1,000,000	\$900,000	\$900,000	(\$100,000)
<i>Total Revenues</i>	\$980,008	\$1,000,000	\$900,000	\$900,000	(\$100,000)
<b>Net County Cost</b>	(\$490,656)	(\$122,230)	(\$135,000)	(\$135,000)	(\$12,770)

- The Net County Cost in 2023-2024 (-\$135,000) represents the unprogrammed amount of the estimated Transient Occupancy Tax revenue that will be transferred to the Economic Development Reserve Fund (#10014) for future tourism and economic development-related programs/activities.

## Purpose

The Economic Promotion budget provides funding to promote tourism, economic development, and revitalization within San Joaquin County. The Economic Promotion budget is funded by the Transient Occupancy Tax (TOT) revenues from the unincorporated areas of the County. A TOT is levied at 8% on the privilege of occupying a room in a hotel, inn, or other lodging, and requires voter approval.

## Major Budget Changes

### Service and Supplies

- (\$220,000) Decrease in promotion costs for tourism activities related to economic recovery.

### Other Charges

- \$100,000 Increase in costs for economic development support services from San Joaquin County Economic Development Association.

### Revenues

- (\$100,000) Decrease in TOT revenue.

## Program Discussion

The 2023-2024 recommended budget for Economic Promotion totals \$765,000, which is a decrease of \$112,770 from the 2022-2023 adjusted budget.

In 2023-2024, staff will continue to identify opportunities to collaborate and partner with the Conference and Visitor Bureaus, Chambers of Commerce, the cities within the County, and others to support Countywide economic development strategies.

### Tourism Recovery

The 2022-2023 adjusted budget included \$500,000 to support County partners to augment promotional efforts to increase awareness and drive visitation to Countywide activities, businesses, destinations and events through various strategies, including web-based marketing, social media, radio, television, and print advertisements. The goal was to continue to help consumers rediscover the County as a compliment to broader economic recovery efforts and to encourage residents and visitors to support local businesses and promote the County as a year-round destination.



# 1015400000—Economic Promotion

## General Government

In March 2023, the County entered into agreements with partners City of Tracy, Downtown Stockton Alliance, Lodi Winegrape Commission, Rampant Creative, Visit Lodi Conference & Visitors Bureau, and Visit Stockton. Program activities will continue in 2023-2024. Highlights include:

- **City of Tracy** – development and implementation of a campaign promoting the City as a major destination, highlighting activities, events, amenities, and destinations unique to Tracy, including Restaurant Week, Taps on 10th Craft Brew Event, Holiday Ornament Stroll, Annual Downtown Wine Stroll, July 4th Fireworks Show and Downtown Parade, the Summer Block Party series, and Girls Night Out.
- **Downtown Stockton Alliance** – production of a 30-second commercial highlighting Downtown Stockton businesses, attractions, and events for distribution through local broadcast television channels, news applications, and streaming services.
- **Lodi Winegrape Commission** – creation of a marketing campaign featuring its signature event, Lodi Wine Experience (formerly Zinfest), at Lodi Lake. The event is a celebration of the region, its wines, and the County farming community.
- **Rampant Creative** – development of a web-based clearinghouse “Explore SJC” that will highlight tours and events throughout the County, promoting the unique offerings of the region to residents and tourists alike.
- **Visit Lodi Conference & Visitors Bureau** – development of an inclusive marketing campaign featuring the region, identifying key businesses in each of the major tourism areas: wine, adventure, nature, food, recreation, agriculture, events, and weddings.
- **Visit Stockton** – production of a large video campaign for marketing to the Sacramento and San Francisco regions in an effort to attract high-value visitors for the benefit of the community.

The recommended budget includes the rebudgeting of \$280,000 for completion of these efforts by December 2023.

Highlights of the 2023-2024 Economic Development program include:

- Working in partnership with the Employment and Economic Development Department, the San Joaquin (SJ) Partnership, the San Joaquin County Economic Development Association (EDA), Innovation Hub San Joaquin (iHub SJ), Chambers of

Commerce, the cities within the County, Special Districts, San Joaquin Valley partners, local educational institutions, and others on economic development activities.

- Web-based marketing efforts with a focus on businesses looking to expand or relocate, in collaboration with the SJ Partnership, the cities within the County, and other partners.

A total of \$765,000 of the TOT will be used to fund the County’s 2023-2024 Economic Development program, with the remaining \$135,000 to be reserved for future economic development and tourism activities/programs.

Following is a summary of the TOT contributions to the Economic Development Reserve General Fund Special Account (#10014):

Transient Occupancy Tax – Reserve Contributions		
2015-2016	Actual	\$189,189
2016-2017	Actual	236,308
2017-2018	Actual	357,480
2018-2019	Actual	462,173
2019-2020	Actual	516,449
2020-2021	Actual	615,593
2021-2022	Actual	490,656
2022-2023	Estimate	104,464
2023-2024	Recommended	135,000
Total		\$3,107,312

### San Joaquin County EDA

The EDA is the County’s lead agency for promoting Countywide economic development, job creation, business retention and expansion, and entrepreneurial development. The EDA works in partnership with all public and private sector economic development and business service organizations to create a friendlier business climate that is more responsive and supportive to the needs of the County’s key and emerging industry sectors.

In 2023-2024, EDA staff will complete the annual update to the County’s Comprehensive Economic Development Strategy (CEDS). Infrastructure projects contained in the CEDS are eligible for Federal funding. The EDA will continue to work collaboratively with the County Administrator’s Office and regional partners on economic development activities. EDA staff will participate in Community Economic Resiliency Fund (CERF) program initiatives, which allocate State funding to build an equitable and sustainable economy across California’s diverse regions

# 1015400000—Economic Promotion

## General Government

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and foster long-term economic resilience in the overall transition to a carbon-neutral economy.

The EDA will administer the Business Concierge Center planned to open in June 2023 to provide a one-stop location for businesses to utilize technology and access services, including assistance for new and existing businesses with permitting and entitlement processes. EDA will continue to build connections with State, County, and City departments to assist businesses in obtaining licenses, tax identification numbers, and to meet other regulatory requirements. The recommended budget includes \$300,000 to support these economic development efforts.

### San Joaquin Partnership

The San Joaquin Partnership is a public-private partnership between private stakeholders, the County, and its incorporated cities focusing on Countywide economic development with the goal of attracting investment that will create jobs, retain companies, attract new industries, and provide supportive services. The San Joaquin Partnership provides economic development services to clients seeking information on project site locations and works with the Governor's Office of Business and Economic Development to promote opportunities within the County.

In 2023-2024, the San Joaquin Partnership will work with lead agencies to promote and recruit companies and workforce development programs that will assist in creating high-wage jobs in the County. The San Joaquin Partnership will hire a Director of Programs and Inclusive Economic Development Strategies that will help lead regional engagement in the CERF process. In addition, the San Joaquin Partnership and regional partners will co-host a summit that showcases the best opportunities for business development, investment and industry growth to investors, site selectors, and industry consultants. The recommended budget includes a \$60,000 contribution to the San Joaquin Partnership.

### iHub San Joaquin

On October 4, 2013, Assembly Bill 250 was signed into law creating the California Innovation (iHub) Program within the Governor's Office of Business and Economic Development ("GO-Biz"). The purpose of each iHub is to stimulate partnerships, economic development, and job creation by leveraging assets to provide a platform for startup businesses, economic development organizations, business groups, and financial institutions. iHub San Joaquin ("iHub SJ"), entered into a Memorandum of Understanding (MOU) with GO-Biz on November 14, 2014, officially designating iHub SJ as one of 15 Statewide iHubs. iHub SJ focused on three industry sectors within the boundaries of

San Joaquin County: Healthcare, Sustainable Construction Technology, and Agri-business.

The iHub program was relaunched in 2021 by the California Office of the Small Business Advocate (CalOSBA) as the Inclusive Innovation Hub program (iHub<sup>2</sup>), with a new emphasis on diversity, equity, and inclusion. The iHub<sup>2</sup> program aims to accelerate technology and science-based firms in key industry areas with an emphasis on outreach to diverse founders, including women and people of color, and on underserved geographies and regions.

iHub SJ was one of the ten successful applicants for the three-year iHub<sup>2</sup> designation and received a \$250,000 award to build and expand programs. iHub SJ formed the iHub Advisory Council in 2021 to advance priorities in the County and expanding region, including small business development, support for emerging entrepreneurs and disadvantaged regions, and climate resiliency. iHub SJ's Board of Directors includes representatives from the County, cities, business incubators, educational institutions, private sector business, public agencies, and non-profit organizations.

In 2023-2024, iHub SJ will continue to work with partners throughout the region to provide opportunities that foster the Agri-Business, Healthcare, and Sustainable Construction technologies. Events include workshops, technical assistance or referrals, conferences, industry and technology showcases, industry matchmaking, and entrepreneurial pitch competitions. iHub SJ is also working with the SJ Partnership, educational institutions, civic incubators, and others to convene County stakeholders on planning efforts to undertake inclusive economic and community development opportunities with the State through CERF program. In 2023-2024, iHub SJ will host the annual Hackathon in partnership with the San Joaquin County Office of Education and CodeStack Academy. This one-day competition challenges middle school, high school, and college students to develop applications to solve water issues. The recommended budget includes \$20,000 in continued support of iHub SJ.

## Fund Balance

### Economic Development Reserve Fund

The Economic Development Reserve Fund (#10014) was established by the Board in the 2015-2016 budget to support the County's promotional/marketing efforts and economic development activities/programs, including incentives for businesses to relocate and/or expand in the County. As of March 31, 2023, the fund balance totaled \$2,997,513.

# 1016000000—Surveyor

## General Government

Fritz Buchman, *Public Works Director*  
[www.sigov.org/department/pwk](http://www.sigov.org/department/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$388,134	\$400,446	\$449,073	\$449,073	\$48,627
Services & Supplies	162,749	185,378	207,019	207,019	21,641
Centrally-Budgeted Expenses	18,891	25,040	22,873	22,873	(2,167)
Total Expenditures	\$569,774	\$610,864	\$678,965	\$678,965	\$68,101
Expenditure Reimbursements	(38,529)	(6,000)	(6,000)	(6,000)	0
Total Appropriations	\$531,245	\$604,864	\$672,965	\$672,965	\$68,101
<b>Earned Revenues By Source</b>					
Charges For Services	\$436,686	\$450,000	\$450,000	\$450,000	\$0
Operating Transfers In	44,189	0	25,000	25,000	25,000
Total Revenues	\$480,875	\$450,000	\$475,000	\$475,000	\$25,000
<b>Net County Cost</b>	\$50,370	\$154,864	\$197,965	\$197,965	\$43,101
<b>Allocated Positions</b>	2.0	2.0	2.0	2.0	0.0
Temporary (Full-Time Equivalent)	0.8	0.8	0.8	0.8	0.0
Total Staffing	2.8	2.8	2.8	2.8	0.0

## Purpose

The Public Works Surveyor Division processes maps and legal descriptions for subdivisions, annexations, County acquisitions and abandonments. The Division also ensures that mandated functions, such as review of final maps, parcel maps, records of survey, corner records, certificates of correction, and legal descriptions are performed in conformance with State law and local ordinances. The review of final maps includes those prepared for four of the seven cities in San Joaquin County.

The Division also provides services to the public and various governmental agencies. This involves preparation, review, and maintenance of legal descriptions and records related to over 200 agencies, special districts, and the Local Agency Formation Commission (LAFCo).

## Major Budget Changes

### Salaries & Employee Benefits

- \$48,627 Salary and benefits adjustments.

### Services & Supplies

- \$28,984 Increase in allocated service department costs.
- \$7,500 Increase in software costs.
- (\$15,000) Decrease in professional services.

### Centrally-Budgeted Expenses

- (\$2,773) Cost Allocation Plan adjustment.

### Operating Transfers In

- \$25,000 Increase in operating transfers from the Surveyor Monument Preservation Fund (#10601) due to increase in operational costs.

1016000000—Surveyor

General Government

Program Discussion

The 2023-2024 recommended budget for the Surveyor Division totals \$678,965, which is an increase of \$68,101 from the 2022-2023 adjusted budget.

The Division provides mandated services that include assisting the public and other agencies with land surveyor records research and responding to general inquiries. These services are generally offset by fee-based revenue.

In 2023-2024, the Division will continue to scan archival documents and maps stored in the Public Works vault into the document management system. Fee revenues are expected to be sufficient to allow for continued support of this activity.

Fund Balance

Surveyor Monument Preservation Fund

In April 2006, the Board of Supervisors established the Surveyor Monument Preservation General Fund Special Account (#10601). The purpose of the Fund is to set aside a portion of revenue collected from the recordation of certain deeds in order to repair and replace the survey monuments used by professional surveyors. The fund balance as of March 31, 2023 was \$128,040, which reflects utilization of \$7,150 for monument restoration work during 2022-2023. The 2023-2024 recommended budget includes a transfer of \$25,000 from this fund.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022		
Mandated Time Frames					
Certificates of Correction	5	11	15	15	20
Corner Records	202	221	449	276	400
Final Maps	26	29	30	27	30
Parcel Maps	21	22	14	27	24
Records of Survey	61	61	43	98	60
Legal Descriptions					
Abandonments and Acquisitions	9	8	5	4	7
County Applications	40	31	38	45	45
LAFCo	5	9	4	10	7
Strip Dedications and Easement	4	6	13	4	7

# 1016500000—Rebates/Refunds & Judgments/Damages

## General Government

Jerome C. Wilverding, County Administrator  
[www.sigov.org/department/cao](http://www.sigov.org/department/cao)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$40,053	\$35,000	\$40,000	\$40,000	\$5,000
<i>Other Charges &amp; Uses</i>	0	1,000	1,000	1,000	0
<i>Total Appropriations</i>	\$40,053	\$36,000	\$41,000	\$41,000	\$5,000
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$40,053	\$36,000	\$41,000	\$41,000	\$5,000

## Purpose

This budget provides funds to cover refunds of unused licenses, permits, and other payments erroneously made into the County's General Fund. It also provides funds for the payment of miscellaneous judgments and damages that may be assessed against the County during the fiscal year.

## Major Budget Changes

### Services & Supplies

- \$5,000 Increase in anticipated rebates and refunds.

## Program Discussion

It is recommended that an appropriation of \$41,000 be established for 2023-2024; \$40,000 for rebates and refunds, and \$1,000 for judgments and damages, which is an increase of \$5,000 from the 2022-2023 adjusted budget. The actual amount required to support the payment of refunds and judgments fluctuates considerably from year-to-year. In 2021-2022, required payments were \$40,053, while the prior three years averaged approximately \$10,825. It may become necessary to appropriate additional funds during the fiscal year as the exact number and amount of claims and refunds are made.

# 1018000000—Equipment Use Allowance/Debt Service

## General Government

Jerome C. Wilverding, County Administrator  
[www.sigov.org/departments/cao](http://www.sigov.org/departments/cao)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$8,263,352	\$8,268,250	\$8,260,000	\$8,260,000	(\$8,250)
<i>Total Expenditures</i>	\$8,263,352	\$8,268,250	\$8,260,000	\$8,260,000	(\$8,250)
<i>Expenditure Reimbursements</i>	(7,252,135)	(6,932,397)	(7,335,516)	(7,335,516)	(403,119)
<i>Total Appropriations</i>	\$1,011,217	\$1,335,853	\$924,484	\$924,484	(\$411,369)
<b>Earned Revenues By Source</b>					
<i>Interest/Rents</i>	\$19,169	\$12,900	\$22,000	\$22,000	\$9,100
<i>Operating Transfers In</i>	1,017,466	1,322,953	2,462,625	2,462,625	1,139,672
<i>Total Revenues</i>	\$1,036,635	\$1,335,853	\$2,484,625	\$2,484,625	\$1,148,772
<b>Net County Cost</b>	(\$25,418)	\$0	(\$1,560,141)	(\$1,560,141)	(\$1,560,141)

## Purpose

The Equipment Use Allowance/Debt Service budget provides funds for debt service payments on County projects financed on a long-term basis and for interest owed on short-term borrowing. This budget also receives cost reimbursements for building depreciation allowed by the Federal Cost Allocation Plan.

## Major Budget Changes

### Expenditure Reimbursements

- (\$36,657) Elimination of rent from the Human Services Agency due to its inclusion in the Cost Allocation Plan.
- \$439,776 Cost Allocation Plan adjustment.

### Operating Transfers In

- \$1,139,672 Increase in transfer from County Facilities Fee Program.

## Program Discussion

The 2023-2024 recommended budget for Equipment Use Allowance/Debt Service totals \$8,260,000, which is a decrease of \$8,250 from the 2022-2023 adjusted budget.

### Long-Term Financing (\$8,250,000)

This budget funds the annual debt payments for the Certificates of Participation (COPs) and Revenue Bonds issued to finance the County's major capital improvements, construction, and acquisition projects.

Since 1989, the County has issued seven General Government COPs. Of the seven, one is currently outstanding:

- **Administration Building Project** – In 2017, \$79.9 million was issued at 2.155% to: 1) refinance the Series 2007 Administration Building COPs that financed the construction of a 250,000 square foot, six-story County Administration Building in Downtown Stockton; and 2) refinance the callable portion of the 1993 COPs, consisting of the Jail and Sheriff's Operation Center project and the Family Support Building addition project. The refinancing reduced the County's total present value debt obligations by \$26.8 million, and reduced the final maturity date from November 2035 to November 2031, with an average annual debt payment of \$8.2 million.

In addition to the General Government COP, the County has one outstanding Revenue COP whose debt payment is funded by user fees and is accounted for in its respective operating budget. The remaining COP is as follows:

- **Wastewater Conveyance Project** – In 2018, \$7.8 million was issued at 4.244% to: 1) refinance the Series 2007 County Service Area (CSA) 31 Wastewater project COPs; and 2) refinance the 2007 County General Fund loan to CSA 31 that

1018000000—Equipment Use Allowance/Debt Service

General Government

funded the construction of sanitary sewer improvements in CSA 31 (Flag City), the connection fee to the City of Lodi’s wastewater treatment facility, and the decommissioning of the Flag City Treatment Plant.

The refinancing reduced the CSA 31 Wastewater project total present value debt obligations by \$961,260, and extended the final maturity date from August 2037 to August 2042 with an average annual debt payment of \$538,344.

Reimbursement Resolution

In February 2022, the County approved a Reimbursement Resolution (R-22-30) to reimburse expenditures from various County capital projects within three years of expenditure with proceeds of debt to be incurred for a maximum principal amount of \$100.0 million. The County will continue to analyze the best long-term solutions to finance the cost of facility replacement or new construction.

County Administration Building Rent

Local Agency Formation Commission (LAFCo)

On August 24, 2021, the County entered into an agreement with LAFCo (A-21-305) for the use of 1,479 square feet of space on the third floor of the County Administration Building. The rent paid for building allowance is \$22,000 in

2023-2024 and is reflected as revenue in this budget. The agreement is effective through August 31, 2024, and can be extended for six additional years, if desired.

Cost Allocation Plan/County Facilities Fee Transfer

This budget also provides an accounting mechanism by which building depreciation charges can be made by the Auditor-Controller’s Office according to the Federal Cost Allocation Plan. It is anticipated that during 2023-2024, \$7,335,516 of depreciation expense will be credited to this budget from other County entities, which is an increase of \$439,776 in reimbursement from the 2022-2023 adjusted budget.

A portion of the fees collected in the County Facilities Fee (CFF) Program is allocated to pay the debt service payment on the County Administration Building. The 2023-2024 debt payment on the outstanding COP is estimated at \$8,250,000. The CFF portion (29.85%) of the debt service payment is \$2,462,625 and will be recorded as an operating transfer in. In prior years, this CFF payment was discounted to equal the amount needed to offset the COP payment after the Cost Allocation Plan reimbursement and rent revenue was recorded, in an effort to maintain a \$0 Net County Cost. However, upon further review, it is recommended that the full allowable amount of CFF (29.85%) be transferred in as revenue. The building depreciation charges recorded through the Cost Allocation Plan are on a separate schedule and are related to all undepreciated County buildings.

Long-Term Debt Financing as of June 30, 2023

	Original Debt Service	Remaining Debt Service	Average Annual Payment	Maturity Date
<b>General Government - Project</b>				
2017 Certificates of Participation County Administration Building	\$110,355,307	\$66,032,825	\$8,233,169	November 15, 2031
<b>Funded by User Fees - Project</b>				
2018 Revenue Bonds CSA 31 (Flag City) Wastewater	13,462,531	10,766,875	538,344	August 1, 2042
<b>Total Debt</b>	<b>\$123,817,838</b>	<b>\$76,799,700</b>	<b>\$8,771,513</b>	



# Fleet Services Internal Service Fund

## General Government

Fritz Buchman, **Public Works Director**  
[www.sigov.org/department/pwk](http://www.sigov.org/department/pwk)

Internal Service Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$3,995,877	\$4,397,713	\$5,124,778	\$5,124,778	\$727,065
Services & Supplies	6,270,035	7,072,449	9,091,615	9,091,615	2,019,166
Centrally-Budgeted Expenses	932,316	688,031	777,316	777,316	89,285
Other Charges & Uses	10,879	2,509,586	15,000	15,000	(2,494,586)
Capital Expenditures	1,571,001	3,580,800	5,486,000	5,486,000	1,905,200
Total Expenditures	\$12,780,108	\$18,248,579	\$20,494,709	\$20,494,709	\$2,246,130
Expenditure Reimbursements	(35,000)	(2,500)	0	0	2,500
Total Appropriations	\$12,745,108	\$18,246,079	\$20,494,709	\$20,494,709	\$2,248,630
<b>Earned Revenues By Source</b>					
Interest/Rents	\$52,238	\$220,000	\$235,000	\$235,000	\$15,000
Aid From Other Governments	0	1,040,000	940,000	940,000	(100,000)
Miscellaneous Revenues	75,444	210,000	216,000	216,000	6,000
MP-TEL-RAD-PUR Revenue	12,946,704	13,695,000	16,210,000	16,210,000	2,515,000
Total Revenues	\$13,074,386	\$15,165,000	\$17,601,000	\$17,601,000	\$2,436,000
<b>Revenues (Over)/Under Expenses</b>	(\$329,278)	\$3,081,079	\$2,893,709	\$2,893,709	(\$187,370)
<b>Allocated Positions</b>	40.0	41.0	43.0	43.0	2.0
<b>Temporary (Full-Time Equivalent)</b>	0.0	0.0	0.4	0.4	0.4
<b>Total Staffing</b>	40.0	41.0	43.4	43.4	2.4

- MP-TEL-RAD-PUR Revenue includes Charges for Services for Fleet.

## Purpose

The Public Works Department's Fleet Services Division (#8190000000) provides fleet management services including capital replacement planning, financing, market research, specification development, acquisition, operational management, and disposal. The Division's daily mission includes managing assigned vehicles, operating departmental motor pools, and performing maintenance and repair services, along with outfitting special application and patrol vehicles. Fleet also operates several fueling stations throughout the County and is committed to adopting sustainability measures, such as electric vehicles, renewable fuels, and solar technology.

Fleet Services Division manages the Fleet Services Internal Service Fund (ISF) that provides mobility services and charges departmental customers for those services. Fleet costs including asset replacement are grouped into asset classes, and rates are set to recover those costs. These rates are analyzed and adjusted annually using historical and projected costs. Additional revenue is generated from maintenance, repairs, and fuel provided to non-fleet managed vehicles.



# Fleet Services Internal Service Fund

## General Government

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$478,785 Salary and benefits adjustments.
- \$185,530 Add one Automotive Mechanic and one Equipment Service Worker II.
- \$58,750 Increase in extra-help.
- \$4,000 Increase in overtime.

#### Services & Supplies

- \$1,200,000 Increase in fuel costs.
- \$300,000 Increase in automotive parts.
- \$250,000 Increase in credit card charges for gasoline.
- \$115,000 Increase in costs of repairs.
- \$62,000 Increase in utilities and communication costs.
- \$50,000 Increase in capital leases.
- \$30,000 Increase in professional services for hazardous waste.
- \$13,000 Increase in small tools and clothing supplies.
- \$8,000 Increase in janitorial services.
- \$6,966 Increase in allocated Public Works costs.
- (\$12,000) Decrease in maintenance of structures, grounds, and tanks.

#### Centrally-Budgeted Expenses

- \$20,854 Increase in Workers' Compensation and Casualty insurance costs.
- \$62,141 Cost Allocation Plan adjustment.

#### Other Charges and Uses

- (\$2,489,586) Decrease due to change in accounting.
- (\$5,000) Decrease in underground tank storage fees.

### Capital Expenditures - Equipment

- \$5,376,000 Replacement vehicles (89).
- \$75,000 Portable truck lift.
- \$20,000 Tire changer.
- \$15,000 Wheel balancer.

### Revenues

- \$1,220,000 Increase in gas and oil revenue.
- \$1,000,000 Increase in revenue from capital contributions collected from departments.
- \$230,000 Increase in mileage revenue.
- \$65,000 Increase in revenue from subleases.
- \$50,000 Increase in miscellaneous revenue.
- \$40,000 Increase in revenue from sale of equipment.
- \$15,000 Increase in interest income.
- \$10,000 Increase in outlawed warrants.
- (\$100,000) Decrease in Federal grant funding.
- (\$50,000) Decrease in parts revenue.
- (\$45,000) Decrease in rebates and refunds.

### Program Discussion

The 2023-2024 recommended Fleet Services budget totals \$20,494,709, which is an increase of \$2,246,130 from the 2022-2023 adjusted budget.

#### Fleet Innovation

Innovation in processes and technology create opportunities for improvement in sustainability and resiliency of resources. A cloud-based fleet management system, Global Positioning System, and car-sharing technology, along with customer involvement helps departments achieve maximum utility from fleet investments and lowers mobility costs.

#### SJCars Fleet Sharing Program

Fleet Services operates seven rental sites that share over 139 cars, trucks, and vans serving 19 County departments. The SJCars system provides the convenience of checking

# Fleet Services Internal Service Fund

## General Government

vehicle availability, choosing a vehicle to match the need, and enhanced trip planning. It can also enable departments to identify opportunities for scheduling, ride sharing, multiple trip reservations, and dispatching to increase asset utilization, reduce fleet size, and encourage innovative resource use. To date, the system has allowed for a fleet reduction of 71 vehicles providing a \$2.5 million reduction in ongoing capital costs. In 2023-2024, Fleet Services will begin installation of the new CloudBoxx system, which will eliminate the current keyboxes and enable users to access rental cars utilizing their cell phones.

### Equipment Replacement and Air Quality

Fleet Services' asset management strategy is to replace older, higher-operating cost vehicles with newer, cleaner, and more efficient vehicles. Compact and intermediate cars feature hybrid, plug-in, and pure battery Electric Vehicle (EV) technologies that help reduce carbon fuel use and enable cleaner air. To help offset the cost of those new technologies and speed up adoption in the community at large, grant funding is leveraged to finance acquisitions. Grants are also used to develop fleet EV charging infrastructure.

The 2023-2024 work plan includes a \$840,000 carryover from 2022-2023 for the Environmental Protection Agency partnership project. This project consists of an off-grid, 20-space solar EV charging system at the County's San Joaquin General Hospital and is currently awaiting Caltrans' approval. When complete, this project will lay the groundwork for the future of renewable, resilient, and sustainable energy sources for the community.

### Mileage and Monthly Rates

Mileage rates are structured to reflect costs to Fleet Services' operations, including a variable rate to cover the Division's operating costs and a fixed rate to recapture capital (vehicle) costs. Significant cost increases are expected during 2023-2024 for capital assets due to inflation and transportation costs. Reflecting an average decrease of 5% in mileage rates and an increase of 62% in the monthly rate from 2022-2023, the 2023-2024 rates are set at the following levels:

Class	Mileage Rates	Mo. Rates
Compact Pickup	\$0.67	\$206
Compact Sedan	\$0.54	\$214
Compact Sedan (Electric)	\$0.44	\$282
Full-Size Van	\$1.00	\$338
Intermediate Sedan	\$0.57	\$206
Minivan	\$0.62	\$231
Motorcycle	\$0.92	\$745
Patrol Car	\$1.05	\$643
Pickup 1 Ton	\$0.97	\$278

Class	Mileage Rates	Mo. Rates
Pickup 1/2 Ton	\$0.69	\$225
Pickup 1/2 Ton 4x4	\$0.56	\$257
Pickup 3/4 Ton	\$0.86	\$241
Pickup 3/4 Ton 4x4	\$0.91	\$290
Sedan - Emergency	\$0.64	\$227
Special Body Truck	\$1.05	\$450
Utility Vehicle	\$0.60	\$285
Utility Vehicle Emergency	\$0.86	\$551

### Vehicle Replacements

In 2023-2024, the Division plans to replace 89 of the most aged, repair-intensive, or mission critical vehicles from the replacement reserves at an estimated cost of \$5,376,000, funded from the ISF's replacement reserve. This represents approximately 9.0% of the 985 fleet vehicles maintained by the Division. Prior to finalizing the list of the replacement vehicles, the Division will evaluate the condition and usefulness of vehicles turned in by departments, which may result in the purchase of fewer replacements.

Class of Vehicles	No. of Vehicles	Total Cost
Compact Pickups	1	\$30,000
Compact Sedans	11	374,000
Excavator	1	275,000
Full-Size Vans	3	159,000
Intermediate Sedans	6	156,000
Minivans	8	316,000
Pickups 1 Ton	1	75,000
Pickups 1/2 Ton	15	615,000
Pickups 3/4 Ton	2	126,000
Pickups 3/4 Ton 4x4	3	180,000
Patrol Car	12	900,000
Sedans - Emergency	8	240,000
Special Body Truck	10	1,280,000
Truck - Class 6-7	2	320,000
Truck - Medium Duty	1	90,000
Utility Vehicles-Emergency	5	240,000
<b>Total</b>	<b>89</b>	<b>\$5,376,000</b>

## Fund Balance

### Fleet Services Internal Service Fund

As of March 31, 2023, the Fleet Services Internal Service fund (#38019) had a fund balance of \$12,980,991. The 2023-2024 recommended budget includes the use of \$2.9 million for vehicle replacements and operating costs.

# Fleet Services Internal Service Fund

## General Government

### Workload Data

	<u>Actual</u>			<b>Est./Act.</b>	<b>Projected</b>
	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>2023-2024</b>
<i>Assigned Vehicles</i>	990	997	990	985	995
<i>Time and Material Vehicles</i>	135	135	135	135	135
<i>Preventative Maintenance Services (hours)</i>	12,749	11,277	12,300	13,500	14,200
<i>Unscheduled Vehicle Repairs (hours)</i>	11,528	12,478	10,400	12,000	13,000
<i>Garage Rental Trips</i>	28,280	16,422	21,300	25,000	26,248
<i>Garage Rental Miles</i>	1,107,847	865,014	990,000	975,000	1,000,000
<i>Vehicle Miles Driven (millions)*</i>	9.6	9.2	9.6	9.5	10.0

*\*Excludes time-and-materials vehicle mileage.*



ADOPTED BUDGET

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*Capital Maintenance*

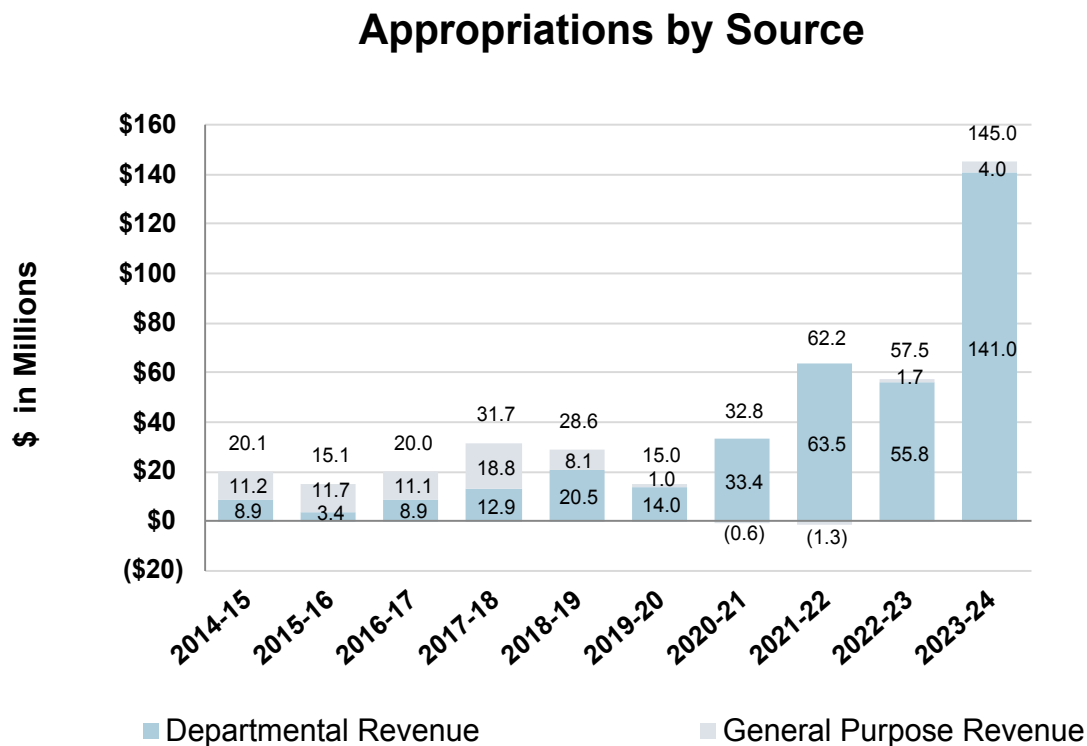
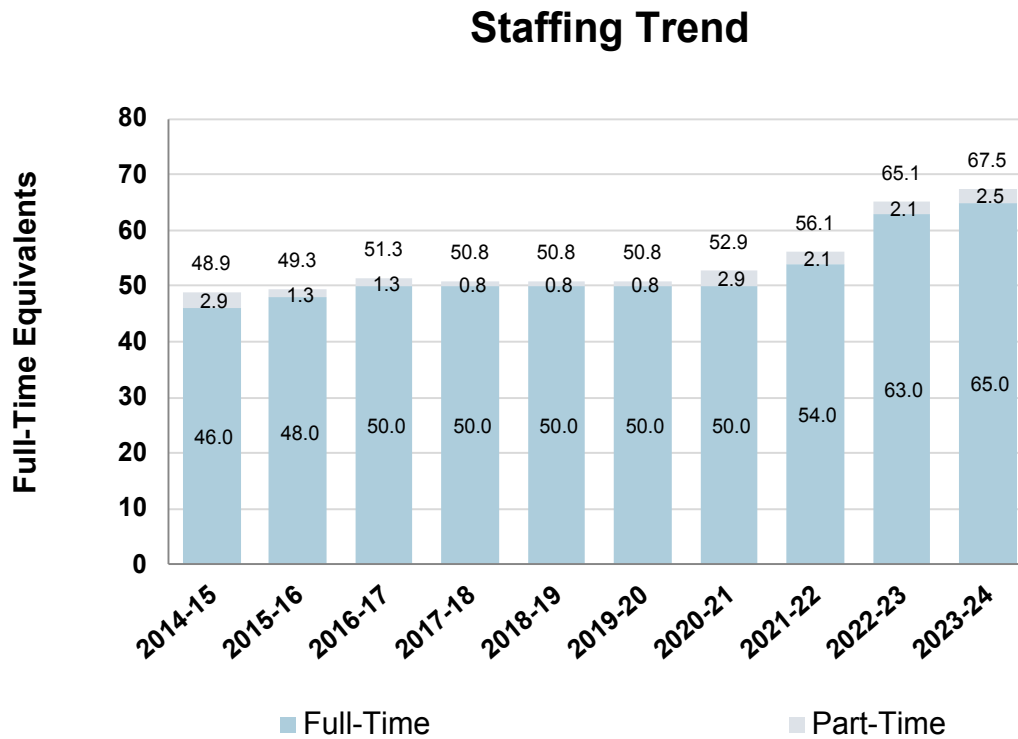
# Capital Maintenance & Improvements

## Appropriations

	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Summary — All General Services Budgets</b>	B-4				
1014000000 General Services Administration	B-7	\$0	\$0	\$0	\$0
1014200000 Facilities Management	B-9	4,234,434	7,214,849	7,214,849	2,980,415
1014300000 Capital Projects Administration	B-12	0	0	0	0
1040148000 Public Improvement	B-14	53,229,352	137,827,358	137,827,358	84,598,006
1014400000 Airpark 599	B-20	0	0	0	0
<b>Total - Capital Maintenance &amp; Improvements</b>		<b>\$57,463,786</b>	<b>\$145,042,207</b>	<b>\$145,042,207</b>	<b>\$87,578,421</b>

# Capital Maintenance & Improvements

## Appropriations

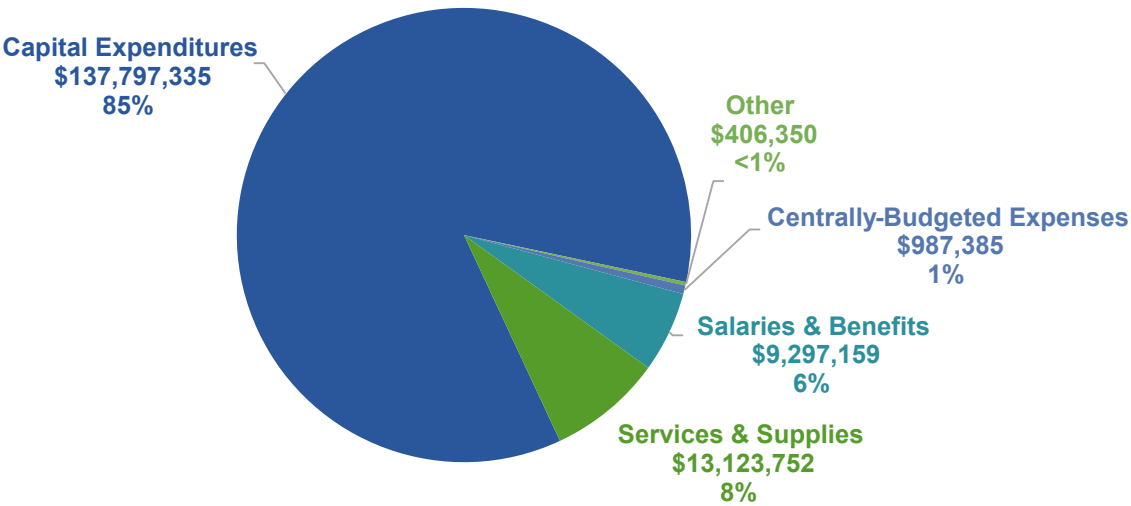


# Capital Maintenance & Improvements

## Appropriations

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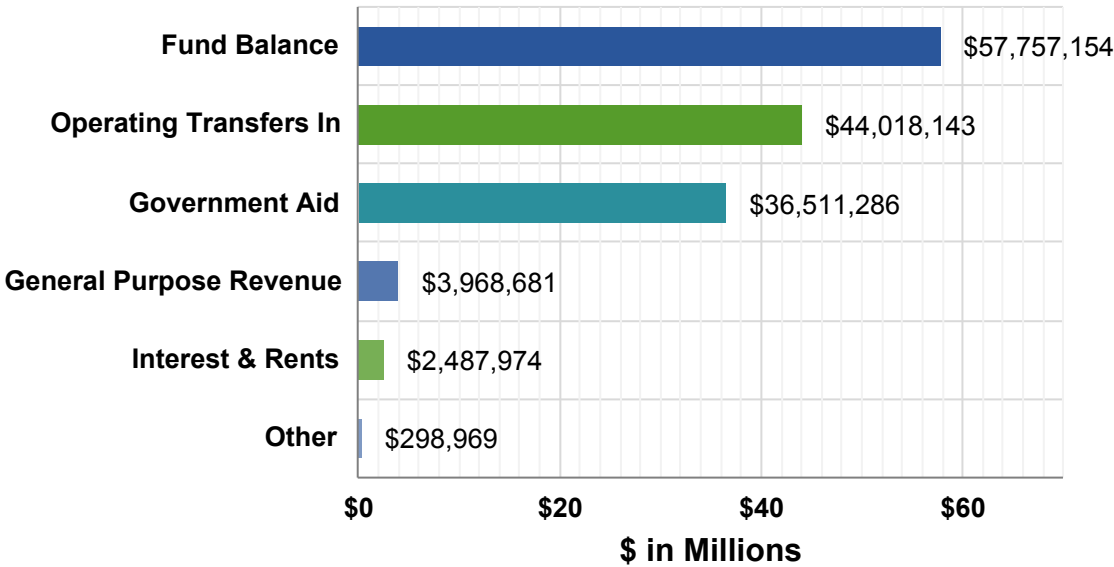
**Use of Funds**  
**2023-2024 Adopted Budget**  
**Total Appropriations \$145,042,207 \***



\* \$161,611,981 Expenditures less \$16,569,774 Cost Reimbursements

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**Source of Funds**  
**2023-2024 Adopted Budget**  
**Total Revenue \$145,042,207**



# Summary

## All General Services Budgets

Marcia Cunningham, General Services Director  
[www.sjgov.org/departments/genser](http://www.sjgov.org/departments/genser)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$10,137,933	\$12,564,173	\$13,958,409	\$13,958,409	\$1,394,236
Services & Supplies	8,526,991	12,855,447	15,049,003	15,049,003	2,193,556
Centrally-Budgeted Expenses	2,906,201	1,624,122	2,878,019	2,878,019	1,253,897
Other Charges & Uses	1,219,295	15,034,601	421,749	421,749	(14,612,852)
Capital Expenditures	29,184,711	39,065,500	137,930,335	137,930,335	98,864,835
Operating Transfers Out	16,100,000	0	0	0	0
Total Expenditures	\$68,075,131	\$81,143,843	\$170,237,515	\$170,237,515	\$89,093,672
Expenditure Reimbursements	(15,020,358)	(16,974,212)	(16,637,993)	(16,637,993)	336,219
Total Appropriations	\$53,054,773	\$64,169,631	\$153,599,522	\$153,599,522	\$89,429,891
<b>Earned Revenues By Source</b>					
Interest/Rents	\$1,435,607	\$1,952,016	\$2,489,174	\$2,489,174	\$537,158
Aid From Other Governments	0	0	36,511,286	36,511,286	36,511,286
Charges For Services	2,105,783	2,061,535	2,033,796	2,033,796	(27,739)
Miscellaneous Revenues	43,420	1,950	1,950	1,950	0
Operating Transfers In	75,444,548	44,940,702	44,482,143	44,482,143	(458,559)
Other Financing Source	56,082	56,082	56,082	56,082	0
Fund Balance	(29,896,654)	9,012,675	57,757,154	57,757,154	48,744,479
Total Revenues	\$49,188,786	\$58,024,960	\$143,331,585	\$143,331,585	\$85,306,625
<b>Net County Cost</b>	\$3,865,987	\$6,144,671	\$10,267,937	\$10,267,937	\$4,123,266
<b>Allocated Positions</b>	93.0	103.0	106.0	106.0	3.0
<b>Temporary (Full-Time Equivalent)</b>	11.2	11.2	11.6	11.6	0.4
<b>Total Staffing</b>	104.2	114.2	117.6	117.6	3.4

## Purpose

This is a summary of the five budgets administered by the Director of General Services.

- 1014000000 General Services Administration
- 1014200000 Facilities Management
- 1014300000 Capital Projects Administration
- 1040148000 Public Improvement
- 7070300000 Parks and Recreation

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:



# Summary

## General Services

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
<ul style="list-style-type: none"> <li>➤ Decrease vacancy rate by 2% each year and maintain below 10%, in order to provide sufficient workforce by taking the following steps:</li> </ul>			
<ul style="list-style-type: none"> <li>➤ Hire all vacant positions by the end of 2022-2023</li> </ul>		13%	June 2023
<ul style="list-style-type: none"> <li>➤ Quickly recruit for vacancies as they occur by submitting a requisition within five days</li> </ul>	15%	11%	June 2024
<ul style="list-style-type: none"> <li>➤ Work with Human Resources and County Administrator's Office to address difficult-to-recruit positions, including utilization of County hiring incentives</li> </ul>		9%	June 2025
Formalize Succession Planning	Current	Target	Deadline
<ul style="list-style-type: none"> <li>➤ Conduct employee training survey to identify the types of training needed</li> </ul>	No survey	Conduct employee survey and take action on results	June 2024
Demonstrate Leadership Development	Current	Target	Deadline
<ul style="list-style-type: none"> <li>➤ Provide leadership development training in anticipation of retirements to identify and prepare future leaders, by taking the following steps:</li> </ul>			
<ul style="list-style-type: none"> <li>➤ Send all supervisors, mid-management, and senior management staff to leadership training</li> </ul>	All senior and executive managers will be completing a comprehensive leadership training course by December 2023	Minimum of one leadership training course per year for all managers and supervisors	June 2025
<ul style="list-style-type: none"> <li>➤ Conduct employee survey</li> </ul>	No employee survey	Conduct employee survey and take action on results	June 2024
<ul style="list-style-type: none"> <li>➤ Increase budget preparation and administration acumen among staff by taking the following steps:</li> </ul>			
<ul style="list-style-type: none"> <li>➤ Provide ongoing budget training</li> </ul>			
<ul style="list-style-type: none"> <li>➤ Increase access to budget system</li> </ul>			
<ul style="list-style-type: none"> <li>➤ Cross-train staff across divisions</li> </ul>			
<ul style="list-style-type: none"> <li>➤ Develop analytical skills in order to pursue funding resources and develop justification for requests for funding</li> </ul>			
	Four staff responsible for individual division budgets	Create budget team consisting of seven staff with departmental oversight provided by Director and Assistant Director	June 2023

# Summary

## General Services

Augment Digitization and Automation	Current	Target	Deadline
➤ Develop Capital Projects web page to include updates on a monthly basis	No regular updates	Monthly status updates of all approved projects	December 2024
➤ Develop and implement an online Facilities Related Budget Request (FRBR) submission and grading process in order to streamline the laborious tasks and provide a better customer experience for departments	Currently the FRBR is a fillable PDF document that is emailed to a dedicated email address	Online process wherein customer departments can more quickly and efficiently submit their FRBR. Additionally, the online process would allow for more efficient processing by the Capital Projects team	October 2024
➤ Enhance the Parks reservation system in order to maximize usage by the customer and streamline the online reservation process	10% online	30% online 50% online	June 2024 June 2025
<b>Homelessness</b>			
Increase Permanent Supportive Housing	Current	Target	Deadline
➤ Effectively oversee the distribution of General Fund, Capital Outlay, and American Rescue Plan Act funds to applicant cities and non-profits as approved by the Board of Supervisors, through the implementation of protocols, including memorandums of understanding and documentation of capital projects completed	Protocols and procedures are in place for distribution of funds. To date, GSD has distributed \$8.5 million for seven projects addressing homelessness in San Joaquin County	Distribute funds dedicated by the Board of Supervisors for Homeless Projects as applications are received	June 2025
<b>Water Management</b>			
Enhance Water Quality	Current	Target	Deadline
➤ Improve the domestic water quality at Micke Grove Regional Park by connecting to the City of Lodi's community water source for potable water. Onsite wells will only be used for irrigation purposes	100% of water, both domestic and irrigation, is provided by on-site wells	Design and begin construction activities to connect to the City of Lodi's domestic water system for potable water needs, and continue use of on-site wells for irrigation	June 2025
Improve Water Storage/Sustainability	Current	Target	Deadline
➤ Reduce irrigation water usage by 7.5% by repairing equipment and installing water-saving technologies	Approximately 70,000 cubic feet of water	Approximately 64,750 cubic feet of water	June 2025

# 1014000000—General Services Administration

## Capital Maintenance & Improvements

Marcia Cunningham, General Services Director  
[www.sjgov.org/departments/genser](http://www.sjgov.org/departments/genser)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$681,016	\$703,305	\$803,796	\$803,796	\$100,491
Services & Supplies	8,874	125,528	142,814	142,814	17,286
Centrally-Budgeted Expenses	32,627	43,863	47,317	47,317	3,454
Total Expenditures	\$722,517	\$872,696	\$993,927	\$993,927	\$121,231
Expenditure Reimbursements	(722,517)	(872,696)	(993,927)	(993,927)	(121,231)
Total Appropriations	\$0	\$0	\$0	\$0	\$0
Earned Revenues By Source	\$0	\$0	\$0	\$0	\$0
Net County Cost	\$0	\$0	\$0	\$0	\$0
Allocated Positions	3.0	3.0	3.0	3.0	0.0

## Purpose

General Services Administration provides oversight and direction for the General Services Department (GSD), which includes three divisions: Facilities Management, Capital Projects Administration, and Parks and Recreation. On May 23, 2023, the Board of Supervisors approved an organizational restructuring, establishing the Office of Emergency Services (#2026000000), formerly a division of GSD, as a stand-alone department effective July 1, 2023.

GSD's vision is "to be valued as a trusted partner, delivering exceptional and reliable services for our customers and the community." Its mission is "to provide sound stewardship of County resources; to provide extraordinary customer service; to plan, organize, and deliver projects and services that support our customers' needs, interests, and priorities; and to develop and maintain clean and safe parks."

## Major Budget Changes

### Salaries & Employee Benefits

- \$98,836 Salary and benefits adjustments.
- \$1,655 Increase in overtime costs.

### Services & Supplies

- \$14,723 Increase in costs for reimbursement of a Deputy Purchasing Agent in the Purchasing and Support Services Division (#1011200000) budget.

### Centrally-Budgeted Expenses

- \$1,992 Increase in data processing charges.

### Expenditure Reimbursements

- \$121,231 Increase in cost reimbursements from the three GSD divisions.

## Program Discussion

The 2023-2024 recommended budget for General Services Administration totals \$993,927, which is an increase of \$121,231 from the 2022-2023 adjusted budget.

GSD provides centralized support of the business objectives of County departments, including facility management services, real estate leasing and acquisition support, energy management, security services, and capital projects administration. The Department also manages the County's 18-park network, a zoo, and a regional sports complex for the recreation and enjoyment of the public. The Director and Assistant Director, with the support of the Administrative Assistant I, provide leadership, supervision, and oversight to the GSD divisions. The administrative overhead costs, inclusive of the aforementioned positions, are distributed across all GSD divisions.

1014000000—General Services Administration
Capital Maintenance & Improvements

General Services Administration Cost Distribution			
Budget	Name	Percentage**	Allocation
1014200000	Facilities Management	37.71%	\$374,795
1014300000	Capital Projects Administration*	36.29%	\$360,685
7070300000	Parks and Recreation	26.00%	\$258,447
Total		100.00%	\$993,927
*The Public Improvement budget (#1040148000) is combined with Capital Projects Administration for purposes of the calculation.			
**Rounded to the nearest hundredth.			

# 1014200000—Facilities Management

## Capital Maintenance & Improvements

Marcia Cunningham, General Services Director  
[www.sjgov.org/departments/genser](http://www.sjgov.org/departments/genser)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$5,076,508	\$6,472,075	\$7,173,262	\$7,173,262	\$701,187
Services & Supplies	6,808,905	10,443,938	12,275,967	12,275,967	1,832,029
Centrally-Budgeted Expenses	421,680	498,344	571,858	571,858	73,514
Other Charges & Uses	354,809	387,000	406,350	406,350	19,350
Capital Expenditures	5,550	436,000	0	0	(436,000)
Total Expenditures	\$12,667,452	\$18,237,357	\$20,427,437	\$20,427,437	\$2,190,080
Expenditure Reimbursements	(13,175,891)	(14,002,923)	(13,212,588)	(13,212,588)	790,335
Total Appropriations	(\$508,439)	\$4,234,434	\$7,214,849	\$7,214,849	\$2,980,415
<b>Earned Revenues By Source</b>					
Interest/Rents	\$649,529	\$632,423	\$669,581	\$669,581	\$37,158
Charges For Services	267,536	238,963	242,887	242,887	3,924
Miscellaneous Revenues	5,279	0	0	0	0
Operating Transfers In	0	1,698,000	2,333,700	2,333,700	635,700
Total Revenues	\$922,344	\$2,569,386	\$3,246,168	\$3,246,168	\$676,782
<b>Net County Cost</b>	(\$1,430,783)	\$1,665,048	\$3,968,681	\$3,968,681	\$2,303,633
<b>Allocated Positions</b>	42.0	51.0	53.0	53.0	2.0
<b>Temporary (Full-Time Equivalent)</b>	2.1	2.1	2.5	2.5	0.4
<b>Total Staffing</b>	44.1	53.1	55.5	55.5	2.4

## Purpose

The Facilities Management Division provides facility-related services for all County-owned and leased facilities, except for San Joaquin General Hospital and Stockton Metropolitan Airport.

The Division is responsible for providing maintenance, repair, and construction services to 418 structures totaling 4,111,560 square feet. The total square footage increased in 2022-2023 with the completion of the Behavioral Health Adult Residential Treatment campus in French Camp. Other services include management of major renovations, repair projects to existing structures, and property leasing and management. Three of the facilities that are maintained are 24-hour custodial facilities.

The Division is also responsible for the County's carpool and bus pass programs as well as billing for services such as the Hospital Lift Station, French Camp McKinley Fire District, and reclamation districts. Additionally, the Division is responsible for security, energy conservation, and real property management of County-owned and County-leased facilities.

# 1014200000—Facilities Management

## Capital Maintenance & Improvements

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$446,608 Salary and benefits adjustments.
- \$152,059 Full-year cost of a Property Manager added midyear 2022-2023.
- (\$120,710) Full-year cost of a Management Analyst I-II deleted midyear 2022-2023.
- \$109,632 Add a Crafts Worker III.
- \$84,674 Add an Office Supervisor.
- \$28,924 Increase in extra-help.

#### Services & Supplies

- \$635,700 Increase in American Rescue Plan Act (ARPA) funded Community Center repair and upgrade projects.
- \$543,990 Increase in utilities costs.
- \$385,079 Increase in costs for maintenance.
- \$162,300 Increase in costs for armed security guard services.
- \$71,445 Increase in allocated costs for General Services Administration.
- \$33,886 Increase in janitorial costs.

#### Centrally-Budgeted Expenses

- \$34,053 Increase in Workers' Compensation and Casualty insurance costs.
- \$23,603 Increase in data processing charges.

#### Expenditure Reimbursements

- \$173,740 Increase in reimbursements for the Foothill Solar Energy Project due to change in accounting.
- \$109,631 Increase in reimbursements for a Crafts Worker III from the Parks and Recreation Division (#7070300000) budget.
- (\$1,073,706) Cost Allocation Plan adjustment.

#### Revenues

- \$32,590 Increase in rental income.

#### Operating Transfers In

- \$635,700 Increase in transfers from ARPA fund for Community Center repair and upgrade projects.

### Program Discussion

The 2023-2024 recommended budget for Facilities Management totals \$20,427,437, which is an increase of \$2,190,080 from the 2022-2023 adjusted budget.

The Board of Supervisors approved the San Joaquin County Ten-Year Facilities Master Plan 2021 Update on May 18, 2021 (B-21-294). Facility Master Plans guide the effective use of current County facilities and plan for the development of future facilities. The updated Master Plan includes new County space planning standards for more efficient utilization of available space. In 2022-2023, Facilities Management sold two surplus County-owned properties and plans to sell one additional surplus property in 2023-2024.

In 2023-2024, Facilities Management will continue to review and assess County facilities to identify building capacities and deficiencies. Additionally, Facilities Management staff will work with the Capital Projects Division to conduct a comprehensive assessment of all County-owned building roof systems in order to plan for roof replacements as appropriate.

#### Utilities

Facilities Management will continue to focus on energy efficiency and utility cost management for County-owned and leased facilities. The 2022-2023 adjusted budget included \$2,514,110 for utilities, an increase of \$55,166 from the 2021-2022 actuals. Based on actual experience to date, staff estimates total annual utilities costs for 2022-2023 will exceed the budgeted amount. The 2023-2024 recommended budget includes \$3,037,573 for utilities, which is an increase of \$523,463 from the 2022-2023 adjusted budget.

### Supplemental Requests

The Director of General Services (GSD) is requesting supplemental funding totaling \$548,999 for the following:

# 1014200000—Facilities Management

## Capital Maintenance & Improvements

### Armed Security Guard Services - County Administration Building

Funding of \$162,300 is requested to provide armed security guard services in the County Administration Building, 24 hours a day, 7 days per week. The Information Systems Division (ISD) has undertaken a project to replace the existing access security system in all County buildings with the Administration Building being the first to receive the new equipment. The current system is aging and has proven to be unreliable. Due to supply-chain delays, the project has not been completed. Until the new system can be installed, GSD has expanded the use of armed security guard services. The requested funding will cover the first six months of 2023-2024, or until the new system is installed.

### Maintenance and Repairs - 222 E. Weber Avenue

Funding of \$300,000 is requested for maintenance and repairs at the old Courthouse, located at 222 E. Weber Avenue in downtown Stockton. For many years maintenance and repairs

in the 60-year-old building have been appropriated in the Public Improvement budget (#1040148000) with funding from the Capital Outlay Fund (#37004). The Capital Outlay Fund is no longer deemed an appropriate funding source for maintenance and repairs. Realignment of these costs with the Facilities Management budget will ensure Capital Outlay funding is reserved for capital projects.

### Office Supervisor

Funding of \$86,699 is requested to add an Office Supervisor (\$84,674) to provide additional administrative support for the Division, which increased by nine positions in 2022-2023, and to assist with the shift of responsibilities from the Capital Projects Administration Division. The position will supervise three Senior Office Assistants. The request includes associated costs for equipment (\$2,025).

The recommended budget has been augmented by \$548,999 to address these requests.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Number of Structures	416	416	417	418	418
Square Footage	3,997,863	3,997,863	4,085,060	4,111,560	4,111,560
Maintenance Work Orders	24,790	24,293	24,837	26,000	27,500
Major Repairs & Renovations	15	11	6	16	20
Service Requests	341	367	387	470	500
Leases Negotiated/Renewed	14	13	11	10	15

# 1014300000—Capital Projects Administration

## Capital Maintenance & Improvements

Marcia Cunningham, General Services Director  
[www.sjgov.org/departments/genser](http://www.sjgov.org/departments/genser)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$689,831	\$1,195,960	\$1,320,101	\$1,320,101	\$124,141
Services & Supplies	88,136	473,406	589,971	589,971	116,565
Centrally-Budgeted Expenses	2,079	43,011	43,486	43,486	475
Capital Expenditures	0	0	50,000	50,000	50,000
Total Expenditures	\$780,046	\$1,712,377	\$2,003,558	\$2,003,558	\$291,181
Expenditure Reimbursements	(780,046)	(1,712,377)	(2,003,558)	(2,003,558)	(291,181)
Total Appropriations	\$0	\$0	\$0	\$0	\$0
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	9.0	9.0	9.0	9.0	0.0

## Purpose

Management and coordination of capital improvements are the responsibility of the General Services Department (GSD). Staffing and other project-related administrative costs are included in the Capital Projects Administration budget. Staff duties include project planning, contract negotiation and monitoring, construction management, and fiscal administration.

## Major Budget Changes

### Salaries & Employee Benefits

- \$114,141 Salary and benefits adjustments.
- \$10,000 Increase in overtime costs.

### Services & Supplies

- \$83,429 Increase in allocated cost for General Services Administration.
- \$16,000 Increase in training costs.
- \$7,500 Increase in small tools costs for purchase of drone and 3D camera.
- \$6,436 Increase in fleet services costs.

### Capital Expenditures - Equipment

- \$50,000 Utility vehicle.

### Expenditure Reimbursements

- \$291,181 Increase in reimbursement for project administration.

## Program Discussion

The 2023-2024 recommended budget for Capital Projects Administration totals \$2,003,558, which is an increase of \$291,181 from the 2022-2023 adjusted budget. Reimbursements for project administration are from the Public Improvement budget (#1040148000).

During 2022-2023, 31 projects have been completed totaling approximately \$15.7 million. Projects include the Public Health Services Facility Replacement, Central Plant Cooling Tower Repairs, Environmental Health Department Roof Repairs, Juvenile Justice Center Landscaping, Kennedy Community Center Pool Repairs, and Oak Grove Lake Bank Erosion Repairs, among others.

For 2023-2024, 47 projects are proposed, totaling approximately \$137.7 million. Projects include continued work on outstanding and planned projects related to existing facilities and major new construction. A comprehensive



# **1014300000—Capital Projects Administration**

## **Capital Maintenance & Improvements**

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listing of planned projects is included in the Public Improvement budget (#1040148000). The proposed work program identifies the primary capital investment priorities for 2023-2024. As resources allow, and subject to the approval of the Capital Review Committee, Capital Projects Administration may also provide reimbursable project management assistance for direct charge to County department projects not included in the 2023-2024 Public Improvement budget.

### **Job Order Contracting**

In 2022-2023, 41 projects totaling \$17.7 million are anticipated to be completed in Year 7 of the Job Order

Contracting (JOC) Program. In the fourth quarter of 2022-2023, Capital Projects Administration brought a recommendation to the Board of Supervisors to award six master construction contracts for Year 8. Under the Program, JOC contractors may be used to perform qualified individual projects during a one-year period.

The JOC Program has allowed GSD and other County departments to complete projects in a cost-effective, timely, and collaborative manner. Other procurement methods, such as the traditional bid process and Purchasing and Support Services' Uniform Public Construction Cost Accounting Act process, will continue to also be utilized.

# 1040148000—Public Improvement

## Capital Maintenance & Improvements

Marcia Cunningham, General Services Director  
[www.sjgov.org/department/genser](http://www.sjgov.org/department/genser)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$1,936	\$0	\$0	\$0	\$0
Centrally-Budgeted Expenses	154,938	112,150	80,023	80,023	(32,127)
Other Charges & Uses	846,181	14,632,202	0	0	(14,632,202)
Capital Expenditures	29,070,892	38,485,000	137,747,335	137,747,335	99,262,335
Operating Transfers Out	16,100,000	0	0	0	0
Total Appropriations	\$46,173,947	\$53,229,352	\$137,827,358	\$137,827,358	\$84,598,006
<b>Earned Revenues By Source</b>					
Interest/Rents	\$785,365	\$1,318,393	\$1,818,393	\$1,818,393	\$500,000
Aid From Other Governments	0	0	36,511,286	36,511,286	36,511,286
Miscellaneous Revenues	(2,549)	0	0	0	0
Operating Transfers In	75,231,703	42,842,202	41,684,443	41,684,443	(1,157,759)
Other Financing Source	56,082	56,082	56,082	56,082	0
Fund Balance	(29,896,654)	9,012,675	57,757,154	57,757,154	48,744,479
Total Revenues	\$46,173,947	\$53,229,352	\$137,827,358	\$137,827,358	\$84,598,006
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

- Operating Transfers In includes a Tobacco Settlement Fund Contribution of \$5,110,000 for 2023-2024.

## Purpose

The Public Improvement budget for projects provides funding for new construction, building alterations, property acquisition, park improvements, facility planning, and major maintenance or equipment replacement. Project phases typically include scope development and programming, design/engineering, solicitation and award of bids, construction, and project acceptance.

Completion time for a capital project may be longer than a fiscal year, depending on the complexity and magnitude. Funding is re-budgeted at the end of the fiscal year for multiyear projects still in progress or projects that have been contractually obligated in order to complete work in the new fiscal year. As a result, the budget includes appropriations re-budgeted from the prior fiscal year and new appropriations supported with either project-specific revenue or discretionary funding.

Following the close of the fiscal year, adjustments may be required to reconcile budgeted amounts with actual revenues and expenditures incurred during the prior fiscal year. This budget narrative includes projects administered by the General Services Department.

## Program Discussion

The 2023-2024 recommended budget for Public Improvement totals \$137,827,358, which is an increase of \$84,598,006 from the 2022-2023 adjusted budget. The increase is primarily due to the planned construction of several new facilities, including the Morgue/Medical Examiner Facility, the County Detention and Program Facility (SB1022), 6 S. El Dorado Street Tenant

Improvements, the Emergency Medical Services Warehouse, and the Sheriff's Office Training Facility.

In 2022-2023, 31 projects have been completed totaling approximately \$15.7 million. For 2023-2024, approximately 95 facility-related budget requests were submitted by departments for consideration and 47 projects are recommended for 2023-2024. Criteria for project funding includes safety and security, reduction in maintenance, utility, and/or operating costs, justification, and the availability of department matching funds.

# 1040148000—Public Improvement

## Capital Maintenance & Improvements

Projects are funded by interest earnings, rents, Tobacco Settlement monies, reimbursement from departments, County Facilities Fee (CFF) Program revenues, and the Capital Outlay Fund (#37004). The estimated unencumbered fund balance at the beginning of 2023-2024 is approximately \$157.5 million. Tobacco Settlement funds are allocated 50% for Health Care facilities and 20% for Capital Improvements. See Tobacco Settlement budget (#1010805000). Of the 30% remaining, 20% is allocated to the Information Systems Division-Internal Service Fund (#8240000000) and 10% for Delta Activities (#2023070000). For 2023-2024, this represents \$3,650,000 in reserve for future Health Care facilities costs and \$1,460,000 for Capital Improvement projects.

Approximately \$82.6 million of the Capital Outlay Fund balance is not recommended for appropriation in the 2023-2024 budget. The table below reflects fund designations through June 30, 2024.

Capital Outlay Fund Balance Designations	Approx. \$ Million
Health Care facilities including the 2023-2024 allocation of \$3.65 million of Tobacco Settlement funds.	\$29.6
American Rescue Plan Act (ARPA) funding for Parks and Recreation.	5.3
Parks and Recreation projects.	4.4
Remaining uncommitted.	43.3
<b>Projected June 30, 2024 Fund Balance</b>	<b>\$82.6</b>

### Encumbrances Carried Forward (\$21.7 million)

- **ARPA-Funded Park Improvements** – To use ARPA funding for the design, engineering, and construction costs for various Parks and Recreation projects. Projects for 2023-2024 include Micke Grove Water Sewer Facility Tie-in, Gianone Park Sewer Tie-in, and irrigation repairs and upgrades at various parks.
- **Behavioral Health Services Adult Residential Treatment Modular Campus** – To partially fund the completion of a three-modular campus in French Camp to provide adult residential treatment services, \$1.0 million of 2022-2023 funding will be encumbered to 2023-2024.
- **Funding for Various Homeless Projects** – To fund various homeless projects being undertaken by cities and non-profits.

### New Construction & Facility Planning (\$114.0 million)

- **6 S. El Dorado Street Tenant Improvements** – To fund the design, engineering, and construction costs for remodeling objectives.
- **Behavioral Health Services Adult Residential Treatment Modular Campus** – To partially fund the completion of a three-modular campus in French Camp to provide adult residential treatment services, \$1.0 million in funding from the department will be used.
- **Capital Projects Contingency – New Construction** – Contingency funding for approved projects in the 2023-2024 work program.
- **Capital Projects – Project Planning and Development** – To fund project pre-planning expenses as directed or authorized.
- **County Detention and Program Facility (SB 1022)** – To fund the design, engineering, and construction of new medium security housing units and program facility to replace the existing Honor Farm barracks.
- **Emergency Medical Services Warehouse** – To fund design, engineering, and construction costs associated with a prefabricated metal facility for departmental emergency services requirements as identified in the Facility Master Plan.
- **Morgue/Medical Examiner Facility Replacement** – To fund design, engineering, and construction costs associated with a new Morgue/Medical Examiner facility.
- **Sheriff’s Office Classroom Building** – To fund design, engineering, and construction costs associated with a prefabricated metal facility for departmental classroom requirements.
- **Sheriff’s Office Evidence Building** – To fund design, engineering, and construction costs associated with a prefabricated metal facility for departmental evidence requirements as identified in the Facility Master Plan.
- **Sheriff’s Office Training Facility** – To fund design, engineering, and construction costs associated with a prefabricated metal facility for departmental training objectives as identified in the Facility Master Plan.
- **South County Park Planning** – To fund the development of conceptual designs for a South County Regional Park.

# 1040148000—Public Improvement

## Capital Maintenance & Improvements

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### Existing Facilities (\$23.7 million)

- **Americans with Disabilities Act (ADA) Building Upgrades** – To address and ensure building compliance with ADA regulations within available funding. New projects for 2023-2024 include Parks upgrades identified in 2020 ADA needs assessment.
- **Behavioral Health Services – 1212 N. California Street Roof and Siding** – To fund construction costs associated with needed repairs to the roofing and siding.
- **Capital Projects Contingency – Existing Facilities** – Contingency funding for approved existing facilities projects calculated at 5% of project costs.
- **Countywide Flooring Replacements** – To fund flooring replacements at various County facilities.
- **Countywide Park Improvements** – To fund the design, engineering, and construction costs for various Parks and Recreation projects. New projects for 2023-2024 include: Utility Services Maps Updates, Well Study, Smart Restrooms, Micke Grove Miniature Golf Course, and Micke Grove Electrical (Phase III).
- **Countywide Parking Lot Repairs** – To fund the design, engineering, and construction costs for various parking lot repair projects. New projects for 2023-2024 include: the Behavioral Health Parking Lot and the Oak Grove Regional Park Overflow Parking Lot.
- **Countywide Security Improvements** – To fund the design, engineering, and construction costs for security improvements to Countywide facilities on an as-needed basis. New projects for 2023-2024 include: 6 S. El Dorado Parking Lot Upgrades and Juvenile Hall Fire Alarm Upgrades.
- **Countywide Space Planning** – To fund Countywide facility space planning and configuration assessments for County-owned facilities on an as-needed basis. New projects for 2023-2024 include: Assessor Reconfiguration, Emergency Services Redesign, Parks Administration Office Reconfigure, Clerk of the Board Space Planning, and the Registrar of Voters 3<sup>rd</sup> Floor Space Expansion.
- **Countywide Roof Replacements** – To fund the design, engineering, and construction costs for roof replacements to Countywide facilities on an as-needed basis. New projects for 2023-2024 include: Human Services Agency Roof Replacement, Honor Farm Warehouse Roof Replacement, and a Countywide Roofing Survey.
- **Countywide Unanticipated Major Repairs** – To fund unanticipated or emergency major repairs to County buildings, structures, and grounds.
- **Honor Farm Kitchen Upgrades** – To fund upgrades to the Honor Farm kitchen built in the 1950's.
- **Honor Farm Laundry HVAC Replacement** – To fund construction costs to replace the existing Honor Farm laundry facility to a 25-ton HVAC system.
- **Honor Farm Restroom Enlargement** – To fund the enlargement of the Honor Farm distribution center restroom.
- **Jail Digital HVAC Controls Replacement Phase II** – To fund construction costs to install and replace the Alerton digital controls for the County Jail and Juvenile Hall HVAC equipment.
- **Juvenile Hall HVAC Chiller Replacement** – To fund costs to replace the existing HVAC chiller.
- **Oak Grove Regional Park Capital Projects Building Improvements** – To fund improvements to the Capital Projects Building located at Oak Grove Regional Park. Objectives for 2023-2024 are installation of a security fence and HVAC replacement.
- **Parks and Recreation Strategic Plan** – To fund the design, engineering, and construction costs for various Parks and Recreation projects. New projects for 2023-2024 include: Westgate Landing Docks and Micke Grove Signage.
- **Pre-Acquisition Property Assessments** – To fund assessments of property the County might be interested in acquiring.
- **Thornton Radio Tower** – To fund the repair and elevation of the Thornton Radio Tower to protect from flood waters.
- **Underground Storage Tank Remediation** – To fund underground fuel storage tank monitoring and remediation required by regulatory agencies at the following sites: Hazelton Complex, Records Center, and the Human Services Agency building area.

# 1040148000—Public Improvement Capital Maintenance & Improvements

Estimated Capital Outlay Fund Balance at the Beginning of 2023-2024: \$157.5 million

2023-2024 Appropriations	Capital Outlay Funding	Department/ Grant Funding	County Facilities Fees (CFF)	Total 2023-2024 Recommended
<b>New Construction &amp; Facility Planning</b>				
6 S. El Dorado Street Tenant Improvements	\$7,621,071		\$11,964,262	\$19,585,333
Behavioral Health Services Adult Residential Treatment Modular Campus		\$1,000,000		1,000,000
Capital Projects Contingency – New Construction	300,000			300,000
Capital Projects Planning & Development	300,000			300,000
County Detention and Program Facility (SB 1022)	497,352	36,511,286		37,008,638
Emergency Medical Services Warehouse	9,830,613			9,830,613
Morgue/Medical Examiner Facility Replacement			18,155,181	18,155,181
Sheriff's Office Classroom Building	2,846,200			2,846,200
Sheriff's Office Evidence Building	7,041,100			7,041,100
Sheriff's Office Training Facility	17,597,800			17,597,800
South County Park Planning	341,970			341,970
<b>Total New Construction &amp; Facility Planning</b>	<b>\$46,376,106</b>	<b>\$37,511,286</b>	<b>\$30,119,443</b>	<b>\$114,006,835</b>
<b>Existing Facilities</b>				
ADA Building Upgrades	\$150,000			\$150,000
Behavioral Health Services Roof and Siding		\$4,670,000		4,670,000
Capital Projects Contingency – Existing Facilities	1,130,500			1,130,500
Countywide Flooring Replacements	415,000			415,000
Countywide Park Improvements	3,290,000			3,290,000
Countywide Parking Lot Repairs	2,500,000	685,000		3,185,000
Countywide Security Improvements	1,100,000			1,100,000
Countywide Space Planning	700,000	100,000		800,000
Countywide Roof Replacement	3,210,000			3,210,000
Countywide Unanticipated Major Repairs	500,000			500,000
Honor Farm Kitchen Upgrades	145,000			145,000
Honor Farm Laundry HVAC Replacement	750,000			750,000
Honor Farm Restroom Enlargement	395,000			395,000
Jail Complex Digital Controls Phase II	1,085,000			1,085,000
Juvenile Hall HVAC Chiller Replacement	225,000			225,000
Oak Grove Capital Projects Building Improvements	750,000			750,000
Parks Strategic Plan	765,000			765,000
Pre-Acquisition Property Assessments	500,000			500,000
Thornton Radio Tower	300,000			300,000
UST Remediation	375,000			375,000
<b>Total Existing Facilities &amp; Park Projects</b>	<b>\$18,285,500</b>	<b>\$5,455,000</b>	<b>\$0</b>	<b>\$23,740,500</b>
<b>Public Improvement Budget</b>	<b>\$64,661,606</b>	<b>\$42,966,286</b>	<b>\$30,119,443</b>	<b>\$137,747,335</b>

# **1040148000—Public Improvement**

## **Capital Maintenance & Improvements**

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### **Long-Term Debt Financing**

On February 1, 2022, the Board of Supervisors adopted a resolution (R-22-30) declaring the intent to finance projects with proceeds from the sale of revenue bonds, certificates of participation, or other forms of indebtedness by the San Joaquin County Public Facilities Financing Corporation. The County has no current plans to issue debt; however, the resolution is in place should the County decide to pursue financing during 2023-2024.

### **County Facilities Fee (CFF) Program**

On June 14, 2005, the Board of Supervisors adopted the CFF Program (R-05-314) in accordance with Government Code Section 66000. The purpose of the CFF Program is to finance

region-serving capital facilities located throughout the County that are used by the residents and businesses within each city and the unincorporated area, and to assure that new development pays its proportional share for these improvements. Fees collected through the CFF Program can be used to offset only the growth-related portion of the costs of County public facilities. As of March 31, 2023, the balance of the County Facilities Fee Program Special Revenue Fund (#21094) was \$72,786,832. The 2023-2024 recommended budget includes funding in the amount of \$30,119,443 from the CFF Fund to offset costs of the Morgue/Medical Examiner Facility Replacement and 6 S. El Dorado Street Tenant Improvements projects. Recommended CFF funding is calculated on the growth-related portions of the respective projects.

# 1040148000—Public Improvement

## Capital Maintenance & Improvements

### Revenue Analysis

Funding for the Public Improvement budget is derived from a combination of the Capital Outlay Fund balance, County

Facilities Fees (CFF), and revenue sources outlined below. The 2023-2024 recommended budget assumes the collection of most revenues in 2022-2023; however, the budget will be adjusted for those revenues not received by June 30, 2023.

Revenue Description	2022-2023 Approved	2023-2024 Recommended	Increase/ (Decrease)
<b>Fund Balances</b>			
2022-2023 Appropriations Encumbered to 2023-2024	\$1,984,719	\$21,671,592	\$19,686,873
Capital Outlay Fund	1,377,956	39,735,562	38,357,606
Tobacco Settlement/Health Care-Related Facilities	(3,650,000)	(3,650,000)	\$0
Total Fund Balances	(\$287,325)	\$57,757,154	\$58,044,479
<b>Interest Earnings</b>			
Capital Outlay Fund	\$1,000,000	\$1,500,000	\$500,000
Total Interest Earnings	\$1,000,000	\$1,500,000	\$500,000
<b>Rents</b>			
Veterans Affairs Clinic	\$318,393	\$318,393	\$0
Total Rents	\$318,393	\$318,393	\$0
<b>Repayments</b>			
Klein Property Purchase	\$56,082	\$56,082	\$0
Total Repayments	\$56,082	\$56,082	\$0
<b>Grants</b>			
State of California – SB1022	\$0	\$36,511,286	\$36,511,286
Total Repayments	\$0	\$36,511,286	\$36,511,286
<b>Long-Term Debt Financing</b>			
Bond Proceeds	\$20,900,000	\$0	(\$20,900,000)
Total Bond Proceeds	\$20,900,000	\$0	(\$20,900,000)
<b>Operating Transfers In</b>			
Behavioral Health Services	\$8,700,000	\$6,355,000	(\$2,345,000)
County Facilities Fees	0	30,119,443	30,119,443
General Fund Transfer	*45,000,000	0	(45,000,000)
Local Tobacco Settlement	5,110,000	5,110,000	0
Office of Emergency Services	0	100,000	100,000
Total Operating Transfers	\$58,810,000	\$41,684,443	(\$17,125,557)
<b>Total Revenue Available</b>	<b>\$80,797,150</b>	<b>\$137,827,358</b>	<b>\$57,030,208</b>
*Transfer from General Fund to Capital Outlay Fund in 2022-2023, as shown in Operating Transfers (#1010804000) budget			

# 1014400000—Airpark 599

## Capital Maintenance & Improvements

Jerome C. Wilverding, County Administrator

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$92,425	\$115,000	\$115,000	\$115,000	\$0
Centrally-Budgeted Expenses	3,323	4,230	244,701	244,701	240,471
Total Expenditures	\$95,748	\$119,230	\$359,701	\$359,701	\$240,471
Expenditure Reimbursements	(95,748)	(119,230)	(359,701)	(359,701)	(240,471)
Total Appropriations	\$0	\$0	\$0	\$0	\$0
Earned Revenues By Source	\$0	\$0	\$0	\$0	\$0
Net County Cost	\$0	\$0	\$0	\$0	\$0

## Purpose

Airpark 599 is an approximately 275-acre, industrial warehouse, distribution, and logistics development project with a small commercial component located on County-owned land adjacent to the Stockton Metropolitan Airport.

This public-private partnership involves an initial County capital contribution and land, combined with the development expertise and capital contribution of the County's development partner, Catellus Stockton, LLC (Catellus). On October 6, 2020, the Board of Supervisors approved the Amended and Restated Master Development Agreement (MDA) with Catellus (B-20-582).

## Major Budget Changes

### Centrally-Budgeted Expenses

- \$240,471 Cost Allocation Plan adjustment.

### Expenditure Reimbursements

- \$240,471 Increase in reimbursements from Airpark 599 Development General Fund Special Account (#10599).

## Program Discussion

The 2023-2024 recommended Airpark 599 budget totals \$359,701, which is an increase of \$240,471 from the 2022-2023 adjusted budget.

In its current configuration, Airpark 599 is planned to include approximately 3.5 million square feet of industrial space, in addition to approximately 12,000 square feet of commercial space. The project is driving new economic activity adjacent to the Stockton Metropolitan Airport and is expected to create approximately 5,000 new jobs at project buildout, depending on the businesses sited within the industrial park.

In 2022-2023, Airpark 599 site development activity progressed. Accomplishments include construction of project roadways (Qantas Lane realignment, East Landing Lane), storm water detention basin, offsite improvements, including phased widening and street frontage improvements, connections to City of Stockton sanitary sewer and water utilities, and construction of a traffic signal at the intersection of Arch-Airport Road and Giannecchini Lane, providing access to a new project driveway.

### Building Construction, Lease Activity

In March 2023, construction was completed on the first industrial building (Building 4) consisting of 1.2 million square feet on approximately 58 acres. Catellus is actively marketing the building to prospective tenants. A second, even larger building is under construction (Building 1) consisting of a 1.4 million square foot logistics facility on approximately 112 acres. Target Corporation has entered into a lease for the building, planned for occupancy in the third quarter of 2023-2024. Approximately 2,500 employees will staff the new facility, with seasonal variations. In 2023-2024, County staff will continue to collaborate with Catellus and project consultants to ensure the successful buildout and marketing of the project. County Staff will also continue to coordinate with the Community Development and Public Works Departments and the City of Stockton.



# **1014400000—Airpark 599**

## **Capital Maintenance & Improvements**

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### *Request for Release of Restrictions (Parcel B-5)*

County staff has worked closely with the Federal Aviation Administration (FAA)’s San Francisco Airports District Office (SFO-ADO) for many years. This has included collaboration on the County’s preparation of a “Request for Release” to secure a 99-year release of FAA restrictions on approximately 32.5 acres of the Airpark 599 project area, referred to as “Parcel B-5.” The release is a key development consideration because the balance of the project site is not encumbered by the same use restrictions and the release would allow the entire 275 acres to be treated similarly when negotiating lease terms with potential tenants. In 2023-2024, staff will continue to work with Catellus to plan for the balance of the Airpark 599 property, including preparation of any environmental clearance documentation required to obtain the FAA release from restrictions.

### **Fund Balance**

#### **Airport East Project Fund**

The Airport East Project Special Revenue Fund (#20048) was established in June 2008 with a contribution of \$13.0 million in County capital funds to reimburse project-related costs. As of March 31, 2023, the fund balance totaled \$6,312,456.

#### **Airpark 599 Development Fund**

The Airpark 599 Development General Fund Special Account (#10599) was established in September 2021 to capture revenue generated from project activity, including County upfront payments, project administration fees, and project revenue distributions pursuant to the MDA. The 2023-2024 recommended budget includes a transfer of \$359,701 from this fund to reimburse ongoing project administration costs. As of March 31, 2023, the fund balance totaled \$5,296,877.



ADOPTED BUDGET

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*Environmental Protection*

# Environmental Protection

## Appropriations

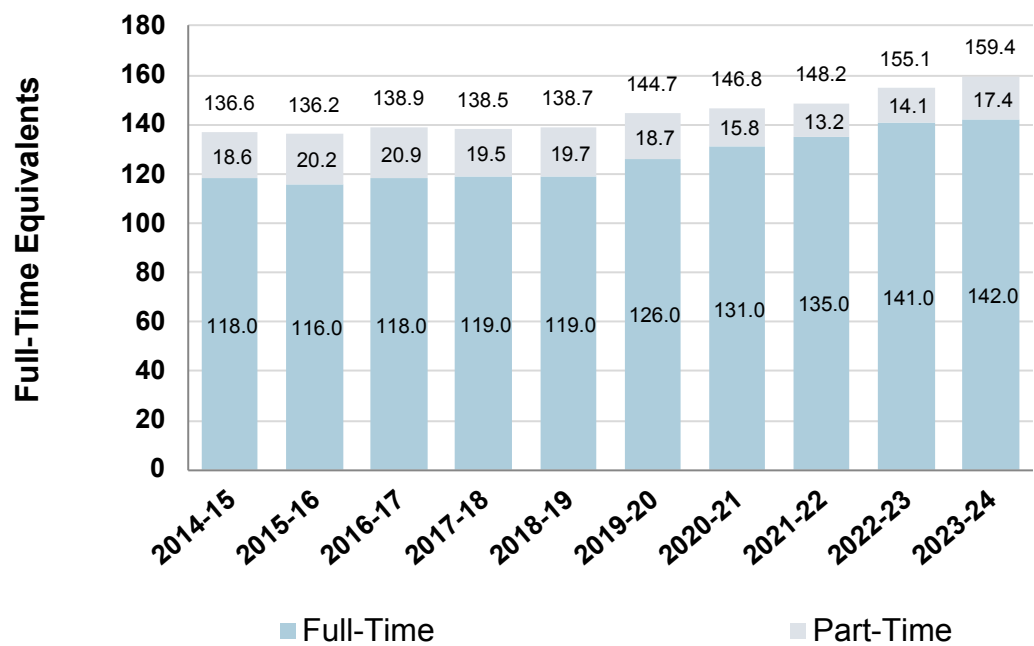
		Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Environmental Protection</b>						
2024100000	Public Works-Flood Channel Maintenance	C-4	\$0	\$0	\$0	\$0
2024700000	Agricultural Commissioner	C-7	9,256,737	9,555,005	9,555,005	298,268
2025600000	Community Development	C-13	13,921,568	14,309,658	14,309,658	388,090
2026000000	Emergency Services	C-21	3,402,506	4,039,392	4,039,392	636,886
2026000150	Homeland Security Grants	C-27	1,208,281	1,683,748	1,683,748	475,467
2026500000	Fish & Game	C-30	700	800	800	100
2026700000	LAFCo Contribution	C-31	248,220	259,638	259,638	11,418
<b>Total - Environmental Protection</b>			<b>\$28,038,012</b>	<b>\$29,848,241</b>	<b>\$29,848,241</b>	<b>\$1,810,229</b>

**Environmental Protection**

**Appropriations**

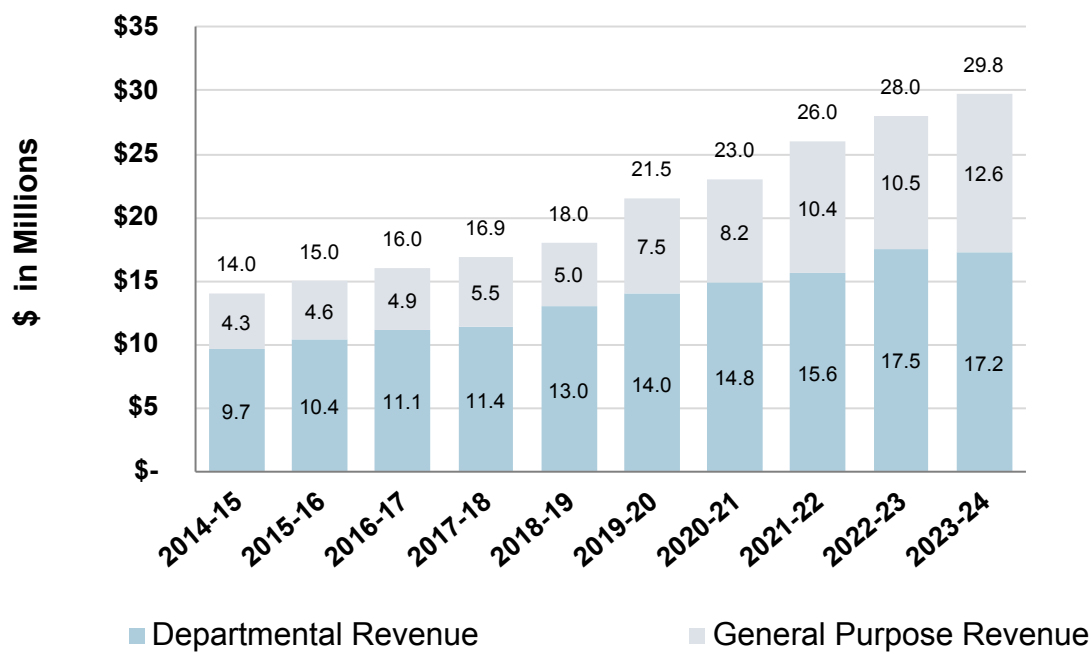
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**Staffing Trend**



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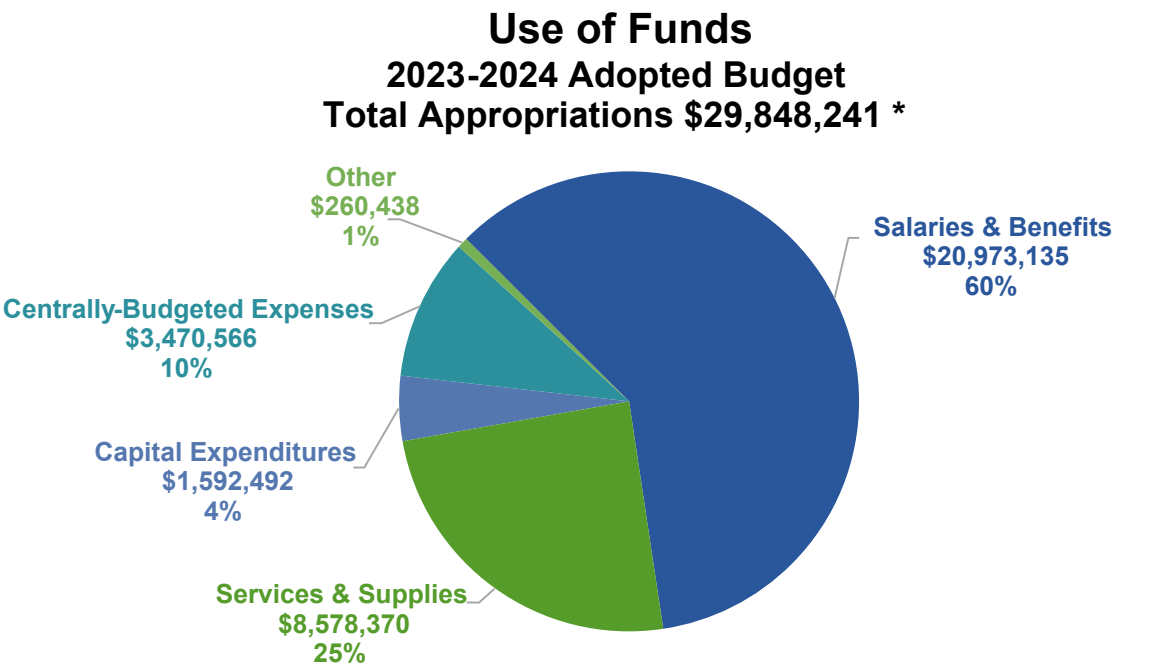
**Appropriations by Source**



# Environmental Protection

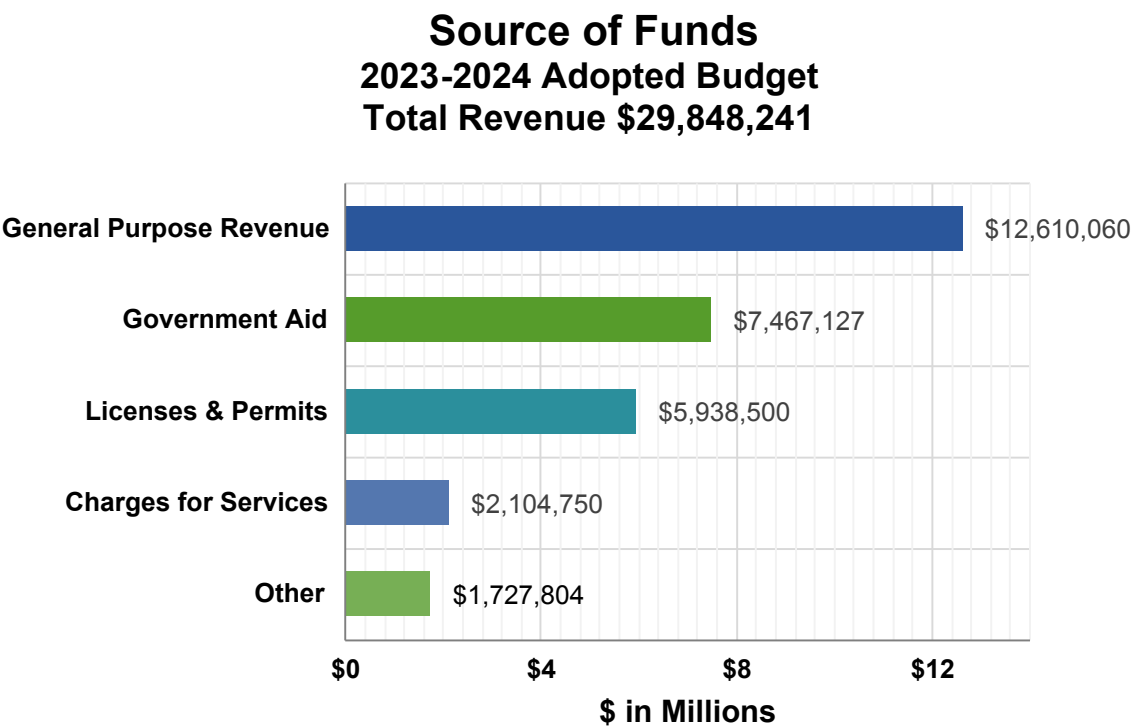
## Appropriations

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*\* \$34,875,001 Expenditures less \$5,026,760 Cost Reimbursements*

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# 2024100000—Public Works-Flood Channel Maintenance

## Environmental Protection

Fritz Buchman, *Public Works Director*  
[www.sigov.org/department/pwk](http://www.sigov.org/department/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,131,332	\$3,045,375	\$3,151,624	\$3,151,624	\$106,249
Services & Supplies	487,459	1,669,200	1,699,920	1,699,920	30,720
Centrally-Budgeted Expenses	106,430	105,181	123,385	123,385	18,204
Total Expenditures	\$2,725,221	\$4,819,756	\$4,974,929	\$4,974,929	\$155,173
Expenditure Reimbursements	(2,693,059)	(4,819,756)	(4,974,929)	(4,974,929)	(155,173)
Total Appropriations	\$32,162	\$0	\$0	\$0	\$0
<b>Earned Revenues By Source</b>					
Miscellaneous Revenues	\$32,162	\$0	\$0	\$0	\$0
Total Revenues	\$32,162	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	28.0	28.0	28.0	28.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	1.5	1.5	1.5	1.5	0.0
<b>Total Staffing</b>	29.5	29.5	29.5	29.5	0.0

## Purpose

The Flood Channel Maintenance budget provides funding for personnel who perform the maintenance of channels and levees within the San Joaquin County Flood Control and Water Conservation District Zones 9 and 10, and flood control maintenance for the San Joaquin Area Flood Control Agency (SJAFCA). Maintenance activities include vegetation management programs, repair of washouts and erosions, maintenance of patrol roads, removal of siltation and debris, and rodent control programs.

The Division maintains over 300 miles of project and non-project levees and flood control channels. Project channels are those constructed as part of a Federal flood control project. These projects are maintained in accordance with the State Department of Water Resources and the United States Army Corps of Engineers (USACE) mandates. Non-project channels are existing waterways that carry storm runoff but not constructed or improved as part of a Federal flood control project. The non-project channels are maintained as funding and work priorities allow.

## Major Budget Changes

➤ \$10,000 Increase in equipment maintenance services.

### Salaries & Employee Benefits

➤ \$5,000 Increase in employee training costs.

➤ \$96,250 Salary and benefits adjustment.

➤ (\$6,280) Decrease in allocated service department costs.

➤ \$9,999 Increase in overtime.

### Centrally-Budgeted Expenses

### Services & Supplies

➤ \$20,000 Increase in small tools and instrument purchases.

➤ \$7,930 Increase in radio maintenance costs.

➤ \$7,508 Increase in Workers' Compensation and Casualty insurance costs.

# 2024100000—Public Works-Flood Channel Maintenance

## Environmental Protection

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### Expenditure Reimbursements

- \$167,542 Increase in direct charges to Zone 9.
- \$91,631 Increase in direct charges to special districts.
- (\$104,000) Decrease in reimbursement from the General Fund for the cleanup of County waterways.

### Program Discussion

The 2023-2024 recommended Flood Channel Maintenance budget totals \$4,974,929, which is an increase of \$155,173 from the 2022-2023 adjusted budget.

Enhanced maintenance programs for Federal project levees and channels will continue during 2023-2024 in an effort to address State and Federal inspection criteria. These efforts include meeting enhanced vegetation guidelines; addressing minimally acceptable and unacceptable inspection ratings related to erosion repairs; rodent control; encroachments; and structures going through levees that require visual inspection. In addition, the Division continues to install erosion control material and remove debris flowing down the watershed. These efforts are an integral part of maintaining full accreditation of County-maintained levees that provide critical urban flood protection.

#### Zone 9

The Flood Control and Water Conservation District Zone 9, consists of 110 miles of project levees and approximately 217 miles of non-project channels. The levels of maintenance services provided are identified in the annual Engineer's Report for Zone 9.

In 2023-2024, the primary focus will remain on vegetation removal and rodent control along project channels to meet

USACE maintenance standards. Continued emphasis will be placed on addressing unauthorized urban encroachments along the Calaveras River and Mormon Slough.

Because enhanced maintenance programs had significantly depleted Zone 9 reserves, program reductions over the last five years were necessary to avoid continued declines in the reserve balance. As of March 31, 2023 the San Joaquin County Flood Control-Zone 9 Special Revenue Fund (#21113) had a balance of \$6.0 million. To ensure that services continue and levee accreditation is maintained, staff will continue to work with the Water Resources Division and the San Joaquin Area Flood Control Agency on a Proposition 218 effort to establish an additional benefit assessment for levee maintenance. The Zone 9 revenues have not kept pace with costs to meet current State and Federal standards.

#### Zone 10

The San Joaquin County Flood Control and Water Conservation District Zone 10 provides limited funding for emergency pumping in the event of a flood or emergency repairs to five miles of levee in the Woodbridge area. Levels of service provided are identified in the annual Engineer's Report. The San Joaquin County Flood Control-Zone 10 Special Revenue Fund (#21114) is used to support expenditures necessary to respond to an emergency flood event. As of March 31, 2023, Zone 10 had a balance of \$335,272.

#### Assessment District 96-1

The SJAFCA has constructed improvements to various levees within Assessment District 96-1. The County provides maintenance for these improvements through a reimbursement agreement with SJAFCA. As the improvements age, increasing maintenance efforts are needed. Upon request, various special maintenance projects are performed for SJAFCA to provide enhanced flood protection within its jurisdiction.

## 2024100000—Public Works-Flood Channel Maintenance

### Environmental Protection

#### Workload Data

	<u>Actual</u>			<u>Est./Act.</u>	<u>Projected</u>
	<u>2019-2020</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>
<i>Channel Debris Clearing (cu yds*)</i>	65,000	75,000	85,000	85,500	95,000
<i>Erosion Control (cu yds*)</i>	17,500	17,000	18,500	19,000	20,000
<i>Illegal Dumping (cu yds*)</i>	2,500	2,500	4,000	6,500	5,000
<i>Levee Clearing (acres)</i>	2,400	2,400	2,400	2,400	2,000
<i>Mowing (acres)</i>	2,500	2,400	2,400	2,400	2,200
<i>Patrol Road Maintenance (miles)</i>	40	30	30	25	25
<i>Rodent Control (acres)</i>	1,200	1,200	1,200	1,200	1,200
<i>Rodent Hole Grouting (holes)**</i>	1,200	N/A	N/A	N/A	N/A
<i>Structured Maintenance</i>	300	275	275	280	280
<i>Tree Trimming/Removal</i>	4,500	5,500	5,500	5,000	5,000
<i>Weed Control (acres)</i>	1,000	1,000	1,000	1,100	1,000

\*cu yds = cubic yards

\*\*Fish and Wildlife no longer allows Grouting



# 2024700000—Agricultural Commissioner

## Environmental Protection

Kamal Bagri, Agricultural Commissioner/Sealer  
[www.sjgov.org/departments/agcomm](http://www.sjgov.org/departments/agcomm)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$5,262,671	\$6,149,009	\$6,546,321	\$6,546,321	\$397,312
Services & Supplies	1,164,828	1,800,866	1,373,181	1,373,181	(427,685)
Centrally-Budgeted Expenses	1,206,749	1,333,724	1,367,334	1,367,334	33,610
Other Charges & Uses	0	5,000	0	0	(5,000)
Capital Expenditures	15,598	15,013	320,000	320,000	304,987
Total Expenditures	\$7,649,846	\$9,303,612	\$9,606,836	\$9,606,836	\$303,224
Expenditure Reimbursements	(81,245)	(46,875)	(51,831)	(51,831)	(4,956)
Total Appropriations	\$7,568,601	\$9,256,737	\$9,555,005	\$9,555,005	\$298,268
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$22,422	\$20,250	\$23,000	\$23,000	\$2,750
Aid From Other Governments	4,670,094	4,426,557	4,090,249	4,090,249	(336,308)
Charges For Services	702,143	670,500	673,500	673,500	3,000
Miscellaneous Revenues	35,229	60,700	40,700	40,700	(20,000)
Operating Transfers In	338,766	716,627	805,604	805,604	88,977
Total Revenues	\$5,768,654	\$5,894,634	\$5,633,053	\$5,633,053	(\$261,581)
<b>Net County Cost</b>	\$1,799,947	\$3,362,103	\$3,921,952	\$3,921,952	\$559,849
<b>Allocated Positions</b>	43.0	43.0	43.0	43.0	0.0
Temporary (Full-Time Equivalent)	11.1	12.0	13.7	13.7	1.7
Total Staffing	54.1	55.0	56.7	56.7	1.7

## Purpose

The Agricultural Commissioner's Office (Office) enforces the provisions of the California Food and Agricultural Code and the California Code of Regulations for the protection of health, safety, and welfare of San Joaquin County residents, and promotes and protects the agricultural industry.

The Agricultural Commissioner is also the Sealer of Weights and Measures and enforces the Business and Professions Code. The Sealer is responsible for testing and certifying all commercial weighing and measuring devices used for commerce; inspecting prepackaged items to assure content; testing and inspecting petroleum products for quality and label truth; and regulating procedures used by weighmasters to issue certificates for the sale of bulk products.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

# 2024700000—Agricultural Commissioner

## Environmental Protection

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve office vacancy rate	27% as of June 30, 2022	5%	June 2024
➤ Improve office annual retention rate	60% as of June 30, 2022	80%	June 2024
Augment Digitization and Automation	Current	Target	Deadline
➤ Develop and implement an electronic reservation system for the Robert J. Cabral Agricultural Center	Email and telephone options for reservations; manual input into a tracking and calendaring system; manual invoicing and bill processing	Web-based automated reservation system, invoicing and payment for room rentals, janitorial services, and other services	June 2025
➤ Develop and implement an electronic agricultural inspection request, dispatch, and tracking system for quarantine and export shipments	Use of two different databases to track and dispatch quarantine and export inspection requests with Microsoft Access software that is no longer supported and only allows one user at a time	Web-based system that allows clients to request services online, including quarantine inspections and export services. The system will provide improved customer service through electronic notification and verification of appointments, and improved accuracy with data tracking and reporting	June 2025
Fiscal Optimization			
Maintain a Structurally Balanced Budget	Current	Target	Deadline
➤ Improve billing efficiency by using the United States Department of Agriculture (USDA) Phytosanitary Certificate Issuance and Tracking (PCIT) System	Department utilizes QuickBooks and other systems to bill customers for export phytosanitary certification inspections	Utilize USDA PCIT for billing and collecting all inspection fees for export certificates	July 2024
Water Management			
Mitigate Illegal Dumping Impacts	Current	Target	Deadline
➤ Hold a pesticide disposal event to provide a safe means for growers to dispose of potentially hazardous, outdated, and unwanted pesticides and protect groundwater and the waters of the San Joaquin Delta	Funds and vendor approved in September-October 2022	3-day event in November 2022	June 2023

# 2024700000—Agricultural Commissioner

## Environmental Protection

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$488,942 Salary and benefits adjustments.
- \$26,996 Increase in extra-help.
- (\$118,626) Decrease in overtime.

#### Services & Supplies

- \$50,000 Increase in software development costs for quarantine and export shipments.
- \$44,954 Increase in fleet services costs.
- (\$450,000) Decrease in costs due to completion of pesticide takeback event.
- (\$87,931) Decrease in costs for State contracts due to accounting adjustment.

#### Centrally-Budgeted Expenses

- \$53,402 Increase in data processing charges.
- \$19,543 Increase in Workers' Compensation and Casualty insurance costs.
- (\$46,208) Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

- \$120,000 Vehicles (2).

#### Capital Expenditures - Structures & Improvements

- \$200,000 Robert J. Cabral Agricultural Center landscaping.

#### Revenues

- \$350,000 Increase in State unclaimed gas tax funds.
- \$82,562 Increase in State pesticide mill fee funds.
- (\$450,000) Decrease in State funding due to completion of pesticide takeback event.

- (\$289,144) Decrease in State funding for Pest Detection contracts.

- (\$22,445) Decrease in State funding for Pest Exclusion contracts.

#### Operating Transfers In

- \$87,777 Increase in transfers from Agriculture Inspection Fund.

### Program Discussion

The 2023-2024 recommended Agricultural Commissioner's Office (Office) budget totals \$9,606,836, which is an increase of \$303,224 from the 2022-2023 adjusted budget.

In 2023-2024, the Office will complete a number of initiatives to better serve clients and improve operational efficiencies. Projects include conversion of the lawn areas of the Robert J. Cabral Agricultural Center to low-water use landscape beds to participate in water conservation efforts, replacement of two State-issued vehicles with the purchase of two new vehicles, and the development of a web-based application for plant quarantine shipments and export certification requests.

#### Unclaimed Gas Tax (UGT) Revenue

State law provides that refunds of fuel taxes may be requested for off-highway usage, such as agricultural purposes; however, not all allowable refunds are requested. These unclaimed monies are deposited into a special fund administered by the California Department of Food and Agriculture (CDFA), with a portion distributed annually to county Agricultural Commissioners. The amount received by each county is based on the relative amount of General Fund support received in comparison to other counties and overall costs of agricultural programs. The County's share of gas tax revenues is budgeted at \$1.55 million for 2023-2024.

Due to the passage of Senate Bill 1 in 2017, there has been an overall increase in UGT funding to CDFA. The increased UGT funding led to the enhancement of the Pest Exclusion program by covering all terminal inspection costs. The Office is anticipating a \$338,339 Pest Exclusion contract for 2023-2024. Additionally, \$21,000 in grant funding will also be received for a Weed Management program to map noxious weed locations in the County.

#### Pest Detection Programs

State Pest Detection contracts typically provide funding for seasonal staff, vehicle expenses, and other supplies to deal with quarantine and eradication efforts. The Office received a

# 2024700000—Agricultural Commissioner

## Environmental Protection

one-year State contract for detection trapping of exotic pests for 2022-2023 in the amount of \$389,663, of which \$92,200 was received to cover trapping of additional pests such as Apple Maggot and Western Cherry fruit flies, and conclude surveying for Vine Mealy Bug. The Office anticipates renewal of the one-year State contract in the amount of \$389,663 for 2023-2024.

- **Asian Citrus Psyllid (ACP)** - The Office received \$186,432 for Federal fiscal year 2022-2023. A new contract for Federal fiscal year 2023-2024 is anticipated to be received by September 2023 for the same amount. If received after the beginning of fiscal year 2023-2024, it will be reflected as a midyear budget adjustment.
- **European Grape Vine Moth (EGVM)** - The contract status for the EGVM program is uncertain due to Statewide eradication in 2016. For 2022-2023, funds remained available and the State contract for 2022-2023 is expected to be \$131,034. If a new contract is received, the Office will present the item and any necessary budget adjustments to the Board of Supervisors for consideration during 2023-2024.

In the long-term view, if State quarantine and pest detection projects scale down significantly, there will be an impact to the Office budget. Aside from direct reductions in seasonal staff and other program expenditures, there will also be an impact to departmental overhead charges. Typically, State contracts allow a 25% overhead charge on part-time seasonal labor costs to help cover indirect administrative and support expenses. If contract revenue is eliminated, the ability to spread indirect costs to these programs is also eliminated, leaving overhead costs to be absorbed by remaining programs or the General Fund. Staff will continue to monitor the situation and reduce or adjust overhead costs as appropriate.

### AgVenture Program

The Office has received a Specialty Crop Block Grant (SCBG) award in the amount of \$294,250 to cover AgVenture costs for the next three years. The recommended budget includes \$128,500 in salary and supply costs for the Program. Any costs not reimbursed by SCBG funding will be transferred from the AgVenture Fund to cover transportation and a portion of the AgVenture Program Coordinator's salary.

In 2022-2023, the number of in-person AgVenture events was continued at four in order to provide adequate social distancing due to COVID-19. Virtual events have been continued as an integral part of AgVenture reaching over 40,000 participants. AgVenture also received an award alongside the USDA's local Resource Conservation District for State Partnership of the Year.

### Nutria Eradication

The Sacramento–San Joaquin River Delta in San Joaquin County alone contains 1,100 miles of levees that protect a deep water channel used for ship traffic to and from the Port of Stockton and 223,000 acres of production agriculture resulting in over \$500.0 million in agriculture crops. Nutria are large, semi-aquatic rodents and are highly invasive in the United States. Nutria are known to burrow in levees in the areas they are found, which can cause levees to collapse, especially in times of high water runoff in spring when levees are under extreme stress due to high water levels. Levee collapse can cause the weakening and collapse of surrounding levees and the incursion of saline water from the San Francisco Bay, threatening the water quality not only in the Delta but to those who receive water supplies from the Delta Mendota Canal.

In fall 2018, it was determined that there was a breeding population in Walthall Slough, and since that time 110 animals have been harvested by the California Fish and Wildlife Services trappers in the County and over 3,330 Statewide. These sightings are particularly troublesome due to the fact that the Delta is an extremely fragile system of levees and islands that provide water to millions of acres of farmland and people in California.

In Federal fiscal year 2022-2023, \$12.0 million in Federal funding was appropriated for Nutria eradication, which will be distributed to states on a first-come, first-served basis. Nutria eradication continues to be a top priority for the County, and the Office continues to support the eradication efforts at the State and Federal level.

### Crop Report

California Food and Agriculture Code Section 2272 mandates the Agricultural Commissioner of each county to compile an annual crop report in accordance with the methods outlined by the National Agricultural Statistics Services. The Annual Crop Report helps in providing agriculture production data to private lending institutions, Assessor, Federal, State, and local governmental agencies.

Calendar Year	Gross Ag Value
2021	\$3,193,234,000
2020	\$3,031,279,000
2019	\$2,617,815,000
2018	\$2,594,246,000
2017	\$2,527,989,000

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## Environmental Protection

### Pesticide Enforcement Revenues

A State mill fee is assessed on pesticides sold in California with monies collected to pay for State Department of Pesticide Regulation programs and to help counties offset the cost of its Pesticide Use Enforcement program. Revenue has increased due to increased sales of antimicrobials that are used for COVID-19. The mill fee revenue for 2023-2024 is projected to increase to approximately \$1.28 million.

### Pesticide Disposal Event

In November 2022, a regional agricultural pesticide amnesty collection event was held at the Lodi Grape Festival Grounds in Lodi, California. The three-day program was established and coordinated by the agriculture departments of San Joaquin, Sacramento, Yolo, Calaveras, and Amador counties. The event invited agricultural businesses within the five-county region the opportunity to dispose of unwanted or legacy pesticides in a safe and effective manner. The event was offered to local growers/farmers and ranchers free of charge. Growers from each of the five counties submitted over 62,000 pounds of old, unwanted and/or outdated packaged pesticides, a quantity that filled more than two truck trailers. The event was funded through the California Department of Pesticide Regulation, with each of the five counties contributing in-kind staffing services to plan, organize, and administer the event.

### Emerging Issues

#### Hemp

In July 2020, the Board of Supervisors revised the Hemp Ordinance No. 4557 to allow cultivation of hemp transplants in the agricultural limited zones of the County (B-20-369). As of August 24, 2021, there were seven registered industrial hemp growers in the County with a total of 499 acres. Because of multiple violations found at four of the County-licensed and State-registered sites, an Urgency Ordinance No. 4591 was presented to the Board on December 14, 2021, placing a moratorium on the approval of any new applications for County licenses for industrial hemp production. This moratorium will stay in effect until the original Ordinance No. 4557 can be revisited.

Due to the continuous changes to State regulations in the area of policy, ongoing discussions with the California Agricultural Commissioner and Sealers Association and its hemp-working group at the State-level continue. In addition, staff continues to attend Hemp Advisory Board meetings and conference calls with hemp regulators throughout the United States. In January 2022, CDFA received Federal approval for the State Hemp Plan. Any oversight activities by staff are covered by fees similar to those already in place for the issuance of export certifications and contracts with CDFA.

### Fund Balance

The Office maintains four General Fund Special Accounts established by the Board to carry out different programs.

#### Agricultural Facilities Fund

The Agricultural Facilities General Fund Special Account (#12005), established in 2010 (B-10-432), receives all fees collected for use of the County Agricultural Center. Funds are used for replacement of furnishings, window coverings, flooring and equipment, special maintenance needs, and incidental supplies for public use areas. As of March 31, 2023, the fund balance totaled \$428,031.

After the revision of facility use fees in October 2015, the fund has seen yearly increases in revenue, but was impacted by the loss of facility bookings beginning in 2020-2021 due to the COVID-19 pandemic. As restrictions have lifted, facility use and revenue have rebounded.

Fiscal Year	Fund Revenues
2018-2019	\$80,549
2019-2020	\$79,405
2020-2021	\$43,291
2021-2022	\$49,243
2022-2023*	\$68,425

*\*As of March 31, 2023*

#### AgVenture Fund

As of March 31, 2023, the General Fund Special Account AgVenture (#12006) fund balance totaled \$338,450. Continuation of the program will be dependent on grant funding, private donations, and County funding.

#### Glassy-Winged Sharp Shooter (GWSS) Prevention Fund

On January 5, 2000, the San Joaquin County GWSS task force was organized to address the threats of the GWSS in the County. Subsequently, the Board established the General Fund Special Account (#12002) to fund the program in the absence of local, State, or Federal funding availability. The original source of funding came through donations from the local wine grape industry. The GWSS program continues to be active, but is now funded with Federal monies through a State contract with the County. As of March 31, 2023, the fund balance totaled \$56,749.

#### Special Agriculture Inspection Fund

The Special Agriculture Inspection General Fund Special Account (#12004) captures revenues from inspection and certification services. Average annual revenue is approximately \$640,000. As of March 31, 2023, the fund

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## Environmental Protection

balance totaled \$4,058,241, and does not include revenue that would have been received from spring 2023 activities, including cherry inspections. The 2023-2024 recommended

budget includes a transfer of \$727,604 from this fund to support office operations, which is an increase of \$87,777 from the amount transferred in 2022-2023.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Action</b>					
<i>Complaint Investigations</i>	46	28	37	40	40
<i>Insect Traps Monitored</i>	10,528	11,475	11,498	11,829	11,745
<i>Investigations</i>	118	60	125	100	150
<i>Pesticide Permits/ID#s Issued</i>	2,039	1,188	1,322	1,145	2,246
<b>Issuance</b>					
<i>Export Certificates Issued</i>	11,942	13,866	13,368	15,565	15,565
<b>Inspections</b>					
<i>Civil Penalty Actions</i>	15	4	1	11	10
<i>Establishments Inspected</i>	2,854	2,695	2,664	1,950	2,300
<i>Fruit and Vegetable Inspections</i>	1,300	863	805	885	930
<i>Measuring Devices Inspected</i>	9,123	9,205	8,271	7,650	7,950
<i>Nursery Inspections</i>	53	78	65	70	70
<i>Package Inspections</i>	462	65	77	35	100
<i>Pesticide Inspections</i>	850	710	750	650	900
<i>Petroleum Inspections</i>	313	251	241	280	275
<i>Seed Inspections</i>	117	217	261	270	270
<i>Weighing Devices Inspected</i>	3,857	3,322	3,178	2,500	2,850
<i>Weighmaster Inspections</i>	17	15	16	13	16
<b>Shipments</b>					
<i>Incoming Plant Shipments</i>	8,500	10,911	17,234	18,721	18,850
<b>AgVenture</b>					
<i>Program Student Participants*</i>	9,992	33,408	39,642	57,716	39,690
<i>Program Volunteers</i>	1,274	87	1,062	975	970

\*Including virtual participants beginning in 2020-2021.



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## Environmental Protection

Jennifer Jolley, Community Development Director

[www.sjgov.org/commdev/](http://www.sjgov.org/commdev/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$7,231,929	\$8,775,738	\$9,624,344	\$9,624,344	\$848,606
Services & Supplies	1,907,559	3,669,386	3,112,403	3,112,403	(556,983)
Centrally-Budgeted Expenses	1,355,431	1,370,777	1,572,911	1,572,911	202,134
Capital Expenditures	53,690	125,667	0	0	(125,667)
Total Expenditures	\$10,548,609	\$13,941,568	\$14,309,658	\$14,309,658	\$368,090
Expenditure Reimbursements	(44,000)	(20,000)	0	0	20,000
Total Appropriations	\$10,504,609	\$13,921,568	\$14,309,658	\$14,309,658	\$388,090
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$5,405,287	\$5,721,681	\$5,915,500	\$5,915,500	\$193,819
Aid From Other Governments	39,280	35,000	37,000	37,000	2,000
Charges For Services	1,429,376	1,837,002	1,431,250	1,431,250	(405,752)
Miscellaneous Revenues	5,122	479,110	132,700	132,700	(346,410)
Operating Transfers In	0	250,000	150,000	150,000	(100,000)
Total Revenues	\$6,879,065	\$8,322,793	\$7,666,450	\$7,666,450	(\$656,343)
<b>Net County Cost</b>	\$3,625,544	\$5,598,775	\$6,643,208	\$6,643,208	\$1,044,433
<b>Allocated Positions</b>	57.0	60.0	61.0	61.0	1.0
<b>Temporary (Full-Time Equivalent)</b>	0.6	0.6	1.0	1.0	0.4
<b>Total Staffing</b>	57.6	60.6	62.0	62.0	1.4

## Purpose

The Community Development Department (CDD) includes five divisions: Building Inspection, Planning/Development Services, Code Enforcement, Geographic Information Systems (GIS) and the Fire Prevention Bureau. The Building Inspection Division protects the public's health and safety by regulating new building construction, inspecting existing buildings, and by reviewing all new development projects. The Planning/Development Services Division processes building and development projects, conducts any necessary environmental review, and prepares reports and makes recommendation to the Planning Commission and the Board of Supervisors. This Division also prepares, maintains, and implements the Development Title and the 2035 General Plan. The Code Enforcement Division enforces the Development Title, the California Building Code and the California Health and Safety Code. The GIS Division maintains the County's GIS to provide map-based information and services, creates and maintains digital mapping data, and produces maps and applications to inform the public and various County Departments. The Fire Prevention Bureau Division is responsible for the administration and enforcement of the California Fire Code as adopted by the County.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

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### Environmental Protection

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve office vacancy rate.	13%	10%	June 2023
Formalize Succession Planning	Current	Target	Deadline
➤ Formalize succession plan to align job duties and organizational chart.  Ex. Creation of a new classification: Deputy Building Official or Supervising Building Inspector.	No formalized succession plan in place for Community Development Department (CDD).	Create a formal succession plan for all divisions.	June 2024
Augment Digitization and Automation	Current	Target	Deadline
➤ Install new permitting software to replace the 30-year-old program.	30-year-old Permits Plus program.	Complete Accela permitting software implementation, currently underway with multiple departments and Information Systems Division assistance.	July 2023
Fiscal Optimization			
Maintain a Structurally Balanced Budget	Current	Target	Deadline
➤ Regularly prepare a time and fee study to maintain an up-to-date department fee schedule, to maintain a balanced budget and reduce Net County Cost.	The cost recovery for Code Enforcement is currently 0%.	Increase cost recovery for Code Enforcement to 10%.	July 2024
	The cost recovery for Fire Prevention Bureau services is currently 25%.	Increase cost recovery for Fire Prevention Bureau services to 35%.	December 2024
Public Safety/Criminal Justice/Quality of Life			
Provide Adequate Resources for Public Safety and Criminal Justice	Current	Target	Deadline
➤ The Substandard Housing and Dangerous Building Program was transferred from Environmental Health Department (EHD) to CDD in 2021-2022. CDD will review outstanding cases and continue to inspect substandard housing and dangerous buildings while providing additional training for Code Enforcement staff.	41 outstanding cases under review/appeal from EHD transition.	Reduce caseload by 12% per month.	December 2023



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Mitigate Illegal Dumping/Human Waste	Current	Target	Deadline
➤ Establish abandoned vehicle program that includes Code Enforcement and Sheriff's Office.	No formalized program in place to address abandoned vehicle program.	Formalize a program for abandoned vehicles with a goal of lowering Net County Costs. There are reimbursement opportunities from the State of California.	June 2024
<b>Homelessness</b>			
Mitigate Illegal Dumping Encampments	Current	Target	Deadline
➤ Identify vacant parcels and buildings that are potential sites for junk, trash and debris, and homeless encampments. Investigate the possibility of developing a program to monitor these sites.	No formalized program exists.	Establish a program with the long-term goal of reducing the number of homeless encampments on abandoned or dilapidated properties and eliminating blight in the County.	July 2025
<b>Water Management</b>			
Mitigate Illegal Dumping Impacts	Current	Target	Deadline
➤ Investigate possibility of establishing a waste tire removal program.	No formalized program exists.	Establish a long-term goal of reducing water pollution, decreasing flood risk and mitigating illegal dumping. Funding from the State of California is available.	July 2025
<b>Economic Development</b>			
Increase Transportation/Logistics/Warehousing Businesses	Current	Target	Deadline
➤ Update Development Title to allow additional flexibility for warehouse type-related projects.	Current Development Title adopted by the Board of Supervisors in 1992.	Updated Development Title adopted by the Board of Supervisors.	December 2022

## Major Budget Changes

### Salaries & Employee Benefits

- \$690,281 Salary and benefits adjustments.
- \$170,815 Full-year cost of a Code Enforcement Manager added midyear 2022-2023.

- (\$171,247) Full-year cost of Community Development Counter Manager deleted midyear 2022-2023.
- \$168,937 Add a Management Analyst III.
- \$24,820 Increase in extra-help.
- (\$35,000) Decrease in overtime costs.

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## Environmental Protection

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### Services & Supplies

- \$170,000 Increase in planning consultant services costs.
- \$130,113 Increase in professional services contract costs for Building Inspection, Code Enforcement, and Fire Prevention Bureau Divisions.
- (\$257,723) Decrease in costs for implementation of permitting and tracking software.
- (\$208,000) Decrease in costs due to completion of the Counter Security Renovation and Efficiency Upgrades project.
- (\$200,000) Decrease in plan check consultant services costs.
- (\$45,400) Decrease in training and travel costs.
- (\$40,000) Decrease in costs for aerial photography services.
- (\$35,000) Decrease in costs for janitorial services.
- (\$23,000) Decrease in costs for capital projects professional services.
- (\$22,000) Decrease in fleet services costs.

### Centrally-Budgeted Expenses

- \$186,313 Increase in data processing charges.

### Revenues

- \$181,000 Increase in planning application fee revenue reflecting higher volume/activity.
- \$143,819 Increase in building permit fees and plan check revenue reflecting higher volume/activity.
- (\$400,000) Decrease in planning and engineering services revenue due to accounting adjustment.
- (\$347,910) Decrease in funding from Local Early Action Planning (LEAP), Regional Early Action Planning (REAP), and Senate Bill 2 grant programs due to completion of projects.

- (\$82,625) Decrease in reimbursement from Mountain House developers.
- (\$61,377) Decrease in Substandard Housing and Dangerous Building Program revenue.

### Operating Transfers In

- (\$100,000) Decrease in transfers from Imaging Technology fund (#81591).

## Program Discussion

The 2023-2024 recommended Community Development budget totals \$14,309,658, which is an increase of \$368,090 from the 2022-2023 adjusted budget.

On October 18, 2022, the Board of Supervisors approved the deletion of a Community Development Counter Manager and the addition of a Code Enforcement Manager (R-22-179). The Code Enforcement Manager will report directly to the Code Enforcement Division Chief and will supervise the compliance and the enforcement of Building, Health and Safety, and Zoning Codes; inspection and enforcement of substandard housing and dangerous buildings; abandoned vehicle abatement; and related matters. The 2023-2024 recommended Community Development budget includes the addition of a Management Analyst III to provide high-level management within the fiscal division of Community Development and to focus on grant funding opportunities for all divisions within the Department.

### Building Inspection Division

The Building Inspection Division is responsible for issuing building permits, reviewing building plans, and performing building inspections Countywide to determine compliance with the California Building Code as adopted by the County. Building Inspection staff perform inspections of residential, agricultural, industrial, and commercial development. The Building Inspection Division consists of four functions:

- **Permit Services** – Processes all building permit applications.
- **Permit Tracking** – Maintains and tracks issued and pending building permits and schedules inspections.
- **Plan Check Services** – Reviews and approves all building plans.
- **Inspection Services** – Performs building inspections for all issued building permits.

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In January 2023, the Department transitioned from paper plan submittal to electronic plan submittal. In anticipation of this transition, the Department conducted extensive outreach efforts to advise the public of this change. The Division continues to accept building permit applications and plans up to ledger size (11"x17") for smaller projects and over-the-counter permits (heating ventilation and air conditioning, water heater, roof, etc.), and staff utilize a scanner to digitize paper submittals when necessary. In February 2023, the Department completed an extensive counter/lobby remodel that will assist with expediting permit processing and allow for a better customer service experience for the public. The Department was awarded LEAP and REAP grant funding in 2022-2023 to implement this project.

The Department utilizes the "goPost" portal ([sjgov.org/commdev](http://sjgov.org/commdev)) to submit electronic plans. In addition to the convenience, the shift to the electronic process has reduced the cost to the public and the Department for plan and document duplication, storage, and conversion from paper to electronic for document archiving. Building Inspection staff can also utilize the electronic plans to perform inspections in the field without paper plans. The Department utilizes e-PlanSoft software for plan review.

### *Permit Tracking System*

The Department has continued the implementation of a new permit tracking software system called Accela, a process that will be completed during the first quarter of 2023-2024. The new system will replace the County's existing 30-year-old permitting system and will greatly improve the efficiency of all Building, Planning, Code Enforcement, and Fire Prevention services for both staff and the public. The new permitting system will be interfaced more effectively with the public through a common portal shared by the Community Development, Environmental Health, and Public Works Departments, and the Treasurer-Tax Collector. All of these departments are instrumental in the issuance of building permits and in the collection of fees based on the type of development that occurs. The Information Systems Division manages the implementation of Accela.

### *Countywide Permit Activity*

Building permit applications for single-family residential homes, agricultural facilities, as well as commercial and industrial development have remained strong Countywide. Building permit activity has remained relatively constant and, based on activity experienced and other economic indicators, the Department is projecting 1% growth for 2023-2024.

Requests for inspections remain at a high volume and staff continues to strive to provide next-day inspection services

without the need to roll over requests. If Plan Check staff is unable to meet the maximum review turnaround time as required in the Health and Safety Code, Community Development anticipates the use of outside plan review consultants to assist in the plan review process, although use of outside consultants is expected to be reduced with the filling of key vacancies and efficiency of new software.

### **Planning/Development Services Division**

The Planning Division reviews land use development proposals of project applicants. The Division is divided into three areas:

- **Current Planning** – Advising, processing, and conducting required environmental review of development projects.
- **Advanced Planning** – Longer term development projects, General Plan Amendments, Zone Reclassifications, Quarries, Development Title updates, and implementation of the 2035 General Plan.
- **Mountain House** – Building, planning, and development services for the unincorporated Mountain House community.

Both Current and Advanced Divisions include staff who work the front counter to provide the public with information regarding development and zoning. In 2023-2024, the Division will continue to review its processes and strive to further streamline procedures, improve accountability, and enhance customer experience.

In addition to having a dedicated email monitored throughout the day to answer Planning Division questions, the Department currently utilizes a program called Camino, which assists the public by providing comprehensive answers to many commonly asked questions and provides links to various planning and building applications that can be filled out online and submitted electronically. The metrics provided by Camino indicate that an average of 200 to 300 visitors utilize this program monthly. When the Accela permit tracking software is fully implemented, Camino will be replaced with a product called Open Cities, which will provide similar information to the public.

### *Development Title Update*

On November 29, 2022, the Board of Supervisors approved a comprehensive update to the Development Title, the County's zoning code that implements the policies of the 2035 General Plan (Ordinance No. 4617; R-22-224). Since adoption, staff has identified areas within the code that require clarification or correction and anticipates processing quarterly updates throughout 2023-2024.

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### Code Enforcement Division

The Code Enforcement Division provides traditional code enforcement services throughout the County. Many complaints received by the Division are related to substandard housing and inappropriate land use. The Division is typically complaint driven. The primary goal of the Code Enforcement Division is to work with the public to obtain voluntary compliance through education and awareness when there is a violation. If compliance is not achieved, the property owner may be subject to fees for cost recovery of staff time and/or administrative fines. Individuals with outstanding violations that do not show signs of progress related to obtaining compliance may also be referred to County Counsel and the District Attorney's Office for possible legal action.

In 2023-2024, staff goals include becoming more efficient using the Accela permit tracking software and more effective through increased training and with the establishment of clearly defined policies, procedures, workflow, and technology improvements.

### Community Clean-Up Program

The Code Enforcement Division organizes the County's Community Clean-Up Program. The Program places dumpsters for trash, electronics, and tires in the designated neighborhoods during the advertised events. Staff also distributes landfill passes to Lovelace Materials Recovery Facility and Transfer Station and North County Recycling Center and Sanitary Landfill to County residents to aid in the proper disposal of accumulated trash. The Division will continue to partner with Public Works on a three-year pilot program to meet community access needs, decrease illegal dumping throughout the County, and address quality-of-life standards. The recommended budget includes funding in the amount of \$125,000. Seventeen program events are scheduled in the following neighborhoods over the course of 12 months:

Neighborhoods	Location
1. Boggs Tract	Stockton
2. Country Club	Stockton
3. French Camp	French Camp
4. Garden Acres	Stockton
5. Gianone Park	Stockton
6. Kennedy Park	Stockton
7. Larch-Clover	Tracy
8. Lockeford	Lockeford
9. Morada	Morada
10. Taft	Stockton
11. Tully C. Knoles	Stockton

Neighborhoods	Location
12. Thornton	Thornton
13. Woodbridge	Woodbridge

The Division will continue to partner with the Department of Public Works, Environmental Health Department, Sheriff's Office, and the Human Services Agency to address community needs, assist with illegal dumping, homeless encampments, and abandoned vehicles throughout the County to address quality-of-life standards.

### Fire Prevention Bureau

The Fire Prevention Bureau is responsible for the administration and enforcement of the California Fire Code as adopted by the County. The Director of Community Development is the County Fire Warden. The Fire Prevention Bureau is managed by a Deputy Fire Warden and is staffed with a Fire Prevention Inspector and an Office Assistant.

The Bureau is tasked with reviewing building plans and performing inspections to determine Fire Code compliance, reviewing appeals on fire prevention issues, certifying occupancies, providing technical consultation with County stakeholders including County Fire Districts, administering the County's operational fire permit program, and administering and enforcing the County's Weed Abatement Program.

### Memorandums of Understanding

The Bureau coordinates and oversees the fire protection programs of the Fire Districts and departments within the County that provide fire services through Memorandums of Understanding (MOU). The Department has conducted extensive outreach with the Fire Districts to coordinate future electronic plan review processes and determine which fire services will be provided by the Department. All decisions will be reflected in updated MOUs to meet the requirements of State law and the needs and priorities of the Districts and the Bureau. These MOUs are expected to be finalized within the first quarter of 2023-2024.

### Fee Schedule Review and Adjustment

On January 31, 2022, the Department implemented the updated fee schedule approved by the Board of Supervisors on October 26, 2021 (R-21-148 through 151), which included updated building permit and plan check fees, as well as updated fees for planning applications and code enforcement activities. The new fees significantly increased cost recovery to the Department in 2022-2023 and minor adjustments to the Planning fees will be recommended for Board of Supervisors consideration in 2023-2024.

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## ***Environmental Protection***

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In addition, the Department intends to return to the Board of Supervisors in 2023-2024 with a comprehensive update to Fire Prevention fees. Prior to recommending adoption of the fees to the Board of Supervisors, staff will conduct extensive outreach with the Fire Districts. Code Enforcement fees will also require updating to align with the new policies and procedures that are currently being drafted.

### ***Imaging/Technology and Technology Recovery Fees***

The updated fee schedule includes a new 5% Technology Recovery Fee applicable to all Building and Planning fees to offset unfunded information technology costs, specifically related to the Accela permit tracking software and other ancillary costs related to technology programs throughout the Department. Since the updated fee became effective, staff has determined that the annual cost to operate Accela will be \$316,673. This amount is based on the number of licenses issued to the department.

In addition, the updated fee schedule included adjustments to the Imaging/Technology Fee. Health and Safety Code Section 19850 states that building departments of every city or county are required to maintain an official copy of all building permits issued during the life of the building. These permits may be imaged on microfilm or other type of photographic copy. Health and Safety Code Section 19852 authorizes fees to offset the expenses incurred. The fee was reduced from 6% to 2% to reflect actual costs. Miscellaneous

and all other permits and plans are charged a flat fee of \$15.00 for the Imaging/Technology Fee. In 2022-2023, the Department estimates it will collect a total of \$115,252.

To improve cost recovery, Community Development will recommend Board of Supervisors consideration of further adjustments to the Technology Recovery Fee and the Imaging/Technology Fee at the June 2023 fee hearing.

### **Mountain House Incorporation**

The Department provides building, planning, and code enforcement services to the unincorporated Mountain House community. An outside planning consultant has been working on behalf of Community Development for the past 18 months to support the Department and continue to provide a high level of customer service and attention to development projects in the Mountain House community. In addition, the Department meets regularly with Mountain House Community Services District (CSD) staff to ensure projects are processed in a timely manner consistent with the vision of the Mountain House Master Plan. The Mountain House CSD has submitted an application to the Local Agency Formation Commission for incorporation to occur by June 2024. The recommended budget includes an additional General Fund contribution of \$165,000 for consultant services to supplement County staff review of the financial and environmental aspects of this potential change and impacts to the County.

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## Environmental Protection

### Workload Data

	Actual			Est. /Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Building Permits</b>					
Commercial	495	557	517	517	527
Residential-County	2,013	2,429	2,367	2,441	2,490
Residential-Mountain House	814	773	567	290	296
Over-the-Counter (roof, HVAC, etc.)	2,141	2,232	2,234	2,088	2,130
<b>Total Permits</b>	<b>5,463</b>	<b>5,991</b>	<b>5,685</b>	<b>5,336</b>	<b>5,443</b>
<b>Planning</b>					
Business License	325	393	330	323	329
Development Applications	264	227	280	227	232
Williamson Act	20	23	36	24	25
<b>Total Applications</b>	<b>609</b>	<b>643</b>	<b>646</b>	<b>574</b>	<b>586</b>
<b>Enforcement</b>					
Abandoned Vehicles	19	5	0	0	0
Community Service Complaints	1,980	2,286	2,562	2,189	2,233
Enforcement Cases					
Cases-Closed	356	377	311	101	110
Cases-Other	141	97	126	249	254
<b>Total Enforcement</b>	<b>2,496</b>	<b>2,765</b>	<b>2,999</b>	<b>2,539</b>	<b>2,597</b>
<b>Fire Services</b>					
Fire Access Roads	98	124	132	153	156
Fire Inspections	231	249	238	270	275
Permits Issued	441	434	409	517	520
Plan Reviews	716	611	477	150	153
Weed Abatement Parcels Abated	30	15	16	13	20
<b>Total Fire Services</b>	<b>1,516</b>	<b>1,433</b>	<b>1,272</b>	<b>1,103</b>	<b>1,124</b>

# 2026000000—Emergency Services

## Environmental Protection

Vacant, *Director of Emergency Operations*  
[www.sigov.org/department/oes](http://www.sigov.org/department/oes)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$836,858	\$1,014,651	\$1,650,846	\$1,650,846	\$636,195
Services & Supplies	1,328,620	1,500,670	1,788,865	1,788,865	288,195
Centrally-Budgeted Expenses	383,373	457,502	399,681	399,681	(57,821)
Capital Expenditures	52,767	309,683	200,000	200,000	(109,683)
Operating Transfers Out	0	120,000	0	0	(120,000)
Total Expenditures	\$2,601,618	\$3,402,506	\$4,039,392	\$4,039,392	\$636,886
Expenditure Reimbursements	(6,112)	0	0	0	0
Total Appropriations	\$2,595,506	\$3,402,506	\$4,039,392	\$4,039,392	\$636,886
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$408,052	\$1,519,231	\$1,663,385	\$1,663,385	\$144,154
Operating Transfers In	0	598,000	598,000	598,000	0
Total Revenues	\$408,052	\$2,117,231	\$2,261,385	\$2,261,385	\$144,154
<b>Net County Cost</b>	\$2,187,454	\$1,285,275	\$1,778,007	\$1,778,007	\$492,732
<b>Allocated Positions</b>	7.0	10.0	10.0	10.0	0.0
Temporary (Full-Time Equivalent)	0.0	0.0	1.3	1.3	1.3
Total Staffing	7.0	10.0	11.3	11.3	1.3

## Purpose

The Office of Emergency Services (OES) is responsible for coordinating with County departments, local cities, and Special Districts to mitigate against, prepare for, respond to, and recover from disasters. OES does not execute tactical field operations, but instead supports requests from first responders in the field.

The central site for managing and coordinating the support of field operations is the San Joaquin County Emergency Operations Center (EOC). The EOC is a multi-agency coordination point for emergencies affecting multiple jurisdictions or disciplines. During a disaster, the EOC is also the communication link with city or special district EOCs, Department/Agency Operations Centers, adjacent counties, the California Inland Regional EOC, and other State and Federal offices.

## Major Budget Changes

### Salaries & Employee Benefits

- \$129,923 Full-year cost of Public Information Specialist added midyear 2022-2023.
- \$126,039 Full-year cost of Senior Emergency Planner added midyear 2022-2023.
- \$8,230 Salary and benefits adjustments.
- \$111,924 Increase in extra-help.
- \$228,612 Full-year cost of Director of Emergency Operations.
- \$31,467 Increase in overtime costs.

# 2026000000—Emergency Services

## Environmental Protection

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### Services & Supplies

- \$675,000 Increase in Department of Water Resources (DWR) Delta Flood Emergency Response, Round 3 expenditures.
- \$63,076 Increase in California Fire Safety Council (CFSC) Grant expenditures.
- \$54,142 Increase in software and related licenses.
- \$39,750 New costs for partial reimbursement of a Geographic Information Systems Specialist in the Public Works Administration (#3030101000) budget.
- (\$261,889) Decrease in DWR Delta Flood Emergency Response, Round 2 expenditures.
- (\$230,786) Decrease in costs due to completion of 2019 and 2020 State Public Safety Power Shutoff (PSPS) Resiliency Grant program.

### Centrally-Budgeted Expenses

- \$10,343 Increase in rents and leases of automation equipment.
- (\$77,700) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$150,000 Shower trailer.
- \$50,000 Utility Task Vehicle (1).

### Operating Transfers Out

- (\$120,000) Decrease in transfers to Parks and Recreation.

### Revenues

- \$675,000 Increase in DWR Delta Flood Emergency Response Round 3 revenue.
- \$175,000 Increase in CFSC Grant revenue.
- \$45,546 Increase in Emergency Management Performance Grant revenue.
- (\$410,923) Decrease in DWR Delta Flood Emergency Response Round 2 revenue.

- (\$340,469) Decrease in revenue due to completion of 2019 and 2020 State PSPS Resiliency Grant program.

## Program Discussion

The 2023-2024 recommended Emergency Services budget totals \$4,039,392, which is an increase of \$636,886 from the 2022-2023 adjusted budget.

### Reorganization, Increased Staffing

On May 23, 2023, the Board of Supervisors approved an organizational restructuring, separating the OES division from the General Services Department, and establishing OES as a stand-alone department effective July 1, 2023. The reorganization included the addition of a Director of Emergency Operations to lead the department.

On February 28, 2023, the Board of Supervisors approved the addition of a Public Information Specialist and a Senior Emergency Planner (R-23-24). The Division will utilize the additional positions to meet the increased workload, implement OES plans and procedures, and support a prepared and resilient County.

In 2023-2024, OES priorities will include continued progress towards improving County employee overall familiarity and understanding of the Emergency Operations Plan (EOP) and supporting annexes. This includes hosting training courses and at least two tabletop exercises utilizing the EOP at the Emergency Operations Center (EOC). In addition, OES will continue to conduct the following activities:

- Work with County departments with roles in emergency response to update and/or develop specific EOP Functional and Hazard Annexes that meet the new Federal Emergency Management Agency (FEMA) required format.
- Maintain the County Employee Preparedness Program through newly developed online trainings.
- Maintain 24-hour disaster response coordination, including alert and warning capability.
- Perform local emergency response coordination, monitoring, and reporting.
- Plan updates, EOC training, and exercises for the Operational Area.
- Stockpile and restock flood fight resources.
- Build and maintain the Regional Logistics Supply Base to house and distribute supplies ordered by cities and Special Districts during flood emergencies.



# 2026000000—Emergency Services

## Environmental Protection

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- Update and implement the comprehensive five-year training and exercise plan (Integrated Improvement Plan) with continued efforts to include cities and Special Districts.
- Continue coordination of the Countywide usage of Everbridge, a web-based public alert and warning software.
- Continue fiscal recovery efforts from COVID-19, to include finalizing FEMA reimbursement claims.
- Coordinate the fiscal and physical recovery from the 2022 December Atmospheric River Storms (Winter Storms) to include monitoring FEMA recovery projects.
- Continue the process to become an Emergency Management Accredited Program accredited County by 2027.
- Identify a mapping software solution for emergency pre-planning, and multi-agency coordination that integrates with public communications, allows for timely and accurate information, and provides a way to keep residents up to date during a disaster.

### Emergency Operations Plan

The EOP explains the general concept of operations, reviews the expected mission execution for each emergency phase, and identifies lead agencies for a given Emergency Support Function (ESF). The Basic EOP outlines the ESFs expected to be activated during an emergency.

The Basic EOP is supported by 23 existing annexes, many of which will be reviewed and revised during 2023-2024. OES will continue to focus on providing training and exercises to the County, cities, and other stakeholders that reinforce knowledge of the EOP and EOC fundamentals. This endeavor will require continued cooperation between all County departments, including Disaster Service Workers.

Quarterly Countywide stakeholder meetings continue to ensure plans and training opportunities are effectively communicated throughout the stakeholder community. These meetings include County departments with roles in emergency response, cities, Special Districts, and appropriate community-based organizations.

OES is working to ensure staff are trained to a minimum type III (type I being the highest) EOC credential in one of the Command and General Staff positions, based on job assignment. Currently, OES has two staff members credentialed as Type I; a Finance and Administration Section Chief, and a Public Information Officer. OES will ensure staff development and succession planning through training related to their responsibilities, which includes creating plans and EOC exercises. As staff complete training, they will be eligible to apply for State certifications and credentials.

Credentials ensure staff are competent in their emergency management roles and are qualified to provide mutual aid to other counties during emergencies.

### Countywide Emergency Operations Center Activation and Recovery

#### *2022 December Atmospheric River Storms (Winter Storms Local Emergency)*

San Joaquin County proclaimed a local emergency on January 1, 2023, due to a series of storms in an atmospheric river, which began around December 28, 2022. On January 4, 2023, the Board of Supervisors ratified the proclamation (R-23-1). Departments and agencies throughout the Operational Area (OA) responded for over 14 days to reports of downed power lines down, fallen trees, roadway issues, localized flooding, evacuations, and rescues. While the County is still recovering from the disaster, the Board of Supervisors terminated the December Emergency on March 28, 2023 (B-23-121).

On January 18, 2023, the County was added to the Department of Homeland Security, FEMA major disaster declaration for the State of California, approving Individual Assistance and again on February 1, 2023, approving all categories of Public Assistance.

Initial estimates included over \$20.0 million in damages to residential and private entities and over \$80.0 million in damage and needed repairs to public infrastructure. Federal, State, and local government entities aided residents through a Disaster Recovery Center supported by OES staff. OES will continue to assist County departments and OA agencies with Public Assistance and Recovery claims through FEMA.

### COVID-19 Pandemic

The Board of Supervisors terminated the Local Emergency Proclamation and Local Health Emergency for the COVID-19 pandemic on February 28, 2023 (B-23-89 and R-23-32). The EOC had remained activated in support of the response efforts since March 13, 2020.

Several State and Federal funding streams for reimbursement have been identified, including eligibility through the Robert T. Stafford Disaster Relief and Emergency Assistance Act (Stafford Act). OES will continue to monitor all eligible reimbursement claims incurred through December 2022. Recovery claims are expected to be obligated through 2023-2024.

### 2021 Drought, Local Emergency

On May 4, 2021, the Board of Supervisors ratified a Local Emergency Proclamation (R-21-49) for drought in the County. The Governor proclaimed a State of Emergency on April 21, 2021, and included the County on May 10, 2021.

# 2026000000—Emergency Services

## Environmental Protection

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California experienced an unprecedented series of storms beginning in December 2022 and lasting through March 2023 that contributed to the recovery of many of the metrics used to implement the local emergency. This has resulted in a historic snowpack, recuperated reservoirs, and groundwater levels that are seeing a modest recovery. Overall, the improved water availability in the County has provided relief to drought-stricken communities and individuals. On May 2, 2023, the Board of Supervisors terminated the Local Emergency.

### Emergency Preparedness Program (EPP)

The 2023-2024 recommended budget includes \$18,600 in staffing costs to provide EPP training courses to County employees to ensure they can safely evacuate from their work area, or shelter in place during an emergency. This includes ensuring training for Facility Threat Coordinators, Area Wardens, and assisting with development of department emergency plans.

The goal of this Program is to develop a video-based online training series for Area Wardens and employee preparedness orientations, which incorporates required trainings for public employees on the Standardized Emergency Management System. The Board of Supervisors adopted County Administrative Policy 1911-Emergency Operations Training on January 24, 2023 (B-23-31).

In 2022-2023, 12 facility evacuation drills were coordinated by OES. In 2023-2024, OES plans to coordinate 20 facility evacuation drills.

### Emergency Preparedness Exercises

Exercises are an essential part of emergency preparedness and are commonly used to test and evaluate plans, policies, and procedures in a learning environment. OES maintains a five-year Integrated Preparedness Plan, which coordinates training and plans revision goals with the intent to build in complexity as mastery is achieved. OES will conduct or participate in two discussion-based exercises and a functional exercise during 2023-2024. Exercise scenarios will be based on previously identified areas of improvement and will include participants from other County departments, cities, Special Districts, and non-government agencies.

Staff will continue to participate in local government exercises and County department exercises to evaluate Operational Area coordination procedures. OES participates in annual dam failure exercises with 15 dam operators and State and Federal agencies.

### Emergency Management Performance Grant

Funding for the FEMA Emergency Management Performance Grant (EMPG) flows through the State and is

allocated to counties on a per capita basis, requiring a 50% local match. These funds are used to enhance local emergency planning, response, and recovery. For many years, OES has successfully secured EMPG funding.

The 2023-2024 recommended budget includes \$326,766 in revenue from this grant.

For planning efforts, this grant covers current emergency plans and annex revisions, as well as training and exercises. FEMA priorities are adjusted annually, but flexibility is allowed in establishing specific local goals if they meet generic Federal goals.

### Department of Water Resources Delta Flood Emergency Response Grant Program, Round 2

In 2018-2019, OES was awarded \$2,404,820 through the DWR Delta Flood Emergency Response Grant Program, Round 2 grant for flood management solutions. This grant includes funding for tasks directed at improving the overall response within the five-county Delta region such as development of Delta-wide evacuation and logistics maps, flood exercises, development of flood just-in-time training videos in English and Spanish, and a mass mailing to citizens in the Delta Region providing evacuation information and maps. OES coordinated the purchase and placement of 31 fully-stocked flood fight storage containers for increased flood response readiness throughout the San Joaquin Delta Region.

In January 2023, OES coordinated with DWR to reallocate funds for additional projects. In 2022-2023 OES purchased a mobile command trailer, portable light towers, and a utility task vehicle to enhance flood fight response. The reallocation of funds has allowed OES to purchase and establish a drone program to enhance levee monitoring and safety. Funding was also allocated to enhance community preparedness and outreach. The 2023-2024 recommended budget includes \$486,619 in revenue from this grant.

### California Fire Safe Council Grant

In February 2023, the Board of Supervisors accepted a \$175,000 California Fire Safe Council (CFSC) 2022 County Coordinator Statewide Grant (B-23-74). This grant is designed to assist counties with wildfire mitigation outreach and coordination by working with local wildfire mitigation groups to educate, encourage, and develop Countywide collaboration. The grant is reimbursed at 100% and is intended to cover costs relevant to Countywide coordination efforts, including but not limited to the salary, support, and administrative costs for a temporary designated County Coordinator.

The 2023-2024 recommended budget includes \$175,000 in revenue from this grant.

# 2026000000—Emergency Services

## Environmental Protection

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### American Rescue Plan Act (ARPA)

OES requested ARPA funding to assist in increasing Countywide training, EOC upgrades, and increasing the availability of specialized emergency response equipment. On December 13, 2022, OES was allocated \$598,000 in ARPA funds by the Board of Supervisors (B-22-692). The 2023-2024 recommended budget includes re-budgeting of these funds.

### Department of Water Resources Delta Flood Emergency Response Grant Program, Round 3

OES was awarded \$1.6 million in DWR Delta Flood Emergency Response Grant Program, Round 3 funding. The project funding includes updates for local Reclamation District flood plans, local Care and Shelter plans, numerous EOC trainings, and additional flood fight materials purchases. The 2023-2024 recommended budget includes \$675,000 for these efforts.

### Planned Grant Activity

OES has applied for \$333,000 in funding from the California Governor's Office of Emergency Services (Cal OES) Hazard Mitigation Grant (HMG). OES updated the Local Hazard Mitigation Plan in 2022-2023, and the HMG award would allow OES to further update the plan and enhance it to a Multi-Jurisdictional Hazard Mitigation Plan, incorporating all cities, Special Districts, and stakeholders. This will allow for the plan to be more comprehensive and appropriate to the threat levels in the County.

### Homeland Security Grants

In 2023-2024, OES will assume the responsibility for administration of the State Homeland Security Grants allocated to San Joaquin County from the Information Systems Division (ISD). This grant program is a stand-alone budget (#2026000150) that has been managed by ISD since 2011. The majority of these grant funds are distributed to local and regional entities for prevention, detection, response, and recovery efforts. The 2023-2024 budget totals approximately \$1.7 million.

### Public Outreach

In 2022-2023, OES participated in several preparedness public outreach events including town halls and speaking engagements for local organizations. OES has a goal to increase attendance at local community events and provide preparedness information by 5% in 2023-2024.

The public facing preparedness and information website, [www.SJReady.org](http://www.SJReady.org), has played a key role in sharing pertinent information about the Winter Storms, COVID-19 pandemic, and the 2021 Drought. OES continues to utilize social media platforms Facebook, Twitter, Instagram, and NextDoor to share real-time information and instructions, as well as preparedness information.

The Joint Information System was utilized to share updates and resources regarding the Winter Storms, COVID-19, and 2021 Drought emergencies.

## Supplemental Requests

The Department is requesting supplemental funding in the amount of \$112,467 for the following:

### *OES Duty Officer Standby Pay*

Funding totaling \$22,717 is requested for the increased cost of required Duty Officer standby pay. With the growth of OES, including staffing and increased response capabilities, up to six personnel will be available to provide Duty Officer coverage 24 hours a day, 7 days per week, aligning with public safety industry standards.

### *Geographic Information Systems (GIS) Specialist*

Funding totaling \$39,750 is requested for the cost-share of an existing GIS Specialist in the Public Works Administration (#3030101000) budget. This position will assist OES in researching and compiling data from County records, public databases, and other sources including maps, roads, technology, development plans, and activation recovery. This information will enhance OES and Public Works capabilities of hazard mitigation, preparedness, response, and recovery before, during, or after a disaster.

### *Mapping Software - Perimeter Inc.*

Funding totaling \$50,000 is requested to establish a four-year contract with Perimeter Inc. for the use of mapping software that will support emergency pre-planning, multi-agency coordination and public communication for evacuation areas. The integrated public communications capability will provide timely and accurate information to keep residents up to date so they can act during a disaster. This information can be viewed publicly through the Perimeter Inc. map link, which can be integrated into other existing platforms such as SJReady.org and SJReady Alerts.

The recommended budget has been augmented by \$112,467 to address these requests.

## 2026000000—Emergency Services

### Environmental Protection

#### Workload Data

	<div>Actual</div>			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Employee Preparedness Program</b>					
<i>Department Plan Assistance</i>	31	10	5	2	15
<i>Disaster Responses</i>	2	6	6	10	6
<i>Employee Preparedness Orientation</i>	15	0	0	15	25
<i>Evacuation Drills</i>	26	6	6	12	20
<i>Facility Threat Plan Assistance</i>	23	1	2	2	15
<i>Warden Training</i>	4	0	0	0	6

# 2026000150—Homeland Security Grants

## Environmental Protection

Vacant, Director of Emergency Operations

[www.sigov.org/departments/oes](http://www.sigov.org/departments/oes)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$641,811	\$116,075	\$604,001	\$604,001	\$487,926
Centrally-Budgeted Expenses	2,664	719	7,255	7,255	6,536
Capital Expenditures	648,500	1,091,487	1,072,492	1,072,492	(18,995)
Total Appropriations	\$1,292,975	\$1,208,281	\$1,683,748	\$1,683,748	\$475,467
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$972,897	\$1,207,562	\$1,676,493	\$1,676,493	\$468,931
Total Revenues	\$972,897	\$1,207,562	\$1,676,493	\$1,676,493	\$468,931
<b>Net County Cost</b>	\$320,078	\$719	\$7,255	\$7,255	\$6,536

## Purpose

The State of California administers more than \$2.0 billion in funds for homeland security, emergency management, justice programs, and victim services grants. The State distributes these funds primarily to local and regional entities to enable the most effective prevention, detection, response, and recovery efforts.

In 2011, Information Systems Division (ISD) assumed responsibility for overall grant management of the Department of Homeland Security Grant funds allocated to San Joaquin County: Homeland Security Grant Program and Urban Area Security Initiative. Effective July 1, 2023, the Office of Emergency Services (OES) will assume responsibility for grant administration. As Grant Administrator, OES will provide administrative oversight and financial management of the Homeland Security grant funds to ensure compliance with State and Federal laws, regulations, and policies.

## Major Budget Changes

### Services & Supplies

- \$194,610 Increase in software and related licenses due to the purchase of crime analysis software.
- \$150,457 Increases in costs for network security services.
- \$117,015 Increase in special departmental expenses primarily due to the Law Enforcement Data Sharing and Crime Analytics projects.

### Centrally-Budgeted Expenses

- \$6,536 Cost Allocation Plan adjustment.

## Capital Expenditures - Equipment

- \$218,451 Re-budget cybersecurity upgrade for Public Health Services.
- \$196,865 Re-budget crisis response van for the Sheriff's Office.
- \$153,050 Re-budget automated license plate reader (ALPR) for Stockton Police Department.
- \$146,180 ALPR for Stockton Police Department.
- \$132,150 Truck and trailer for the Sheriff's Animal Services Unit.
- \$73,227 Bomb squad truck for the Sheriff's Office.
- \$62,623 Re-budget two-way radios for San Joaquin Delta College Police.

# 2026000150—Homeland Security Grants

## Environmental Protection

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- \$57,110 Re-budget Bomb squad x-ray machine for the Sheriff's Office.
- \$18,320 Re-budget cybersecurity equipment.
- \$9,440 Emergency Alert System encoder/decoder for Emergency Operations Center.
- \$5,076 Crime analysis LCD monitor for the Sheriff's Office.

### Revenues

- \$468,931 Increase in net reimbursements from grant projects.

## Program Discussion

The 2023-2024 recommended Homeland Security Grants budget totals \$1,683,748, which is an increase of \$475,467 from the 2022-2023 adjusted budget. During 2022-2023, the Information Systems Division (ISD) met with the Local Approval Authority, which includes representatives from local police, local and rural fire, and emergency medical services agencies, to fund projects that directly support the County's first responders.

The 2023-2024 recommended budget reflects priorities established by the Local Approval Authority and focuses on investing grant funds to support the Federal Emergency Management Agency's four national priorities and projects that benefit the County in the areas of law enforcement, fire protection, cybersecurity, and public health. The General Fund contributes \$7,255 to the Homeland Security Grants budget to cover Cost Allocation Plan charges, which are ineligible for grant funding.

In 2023-2024, Homeland Security Grant funds will support the following projects:

- **\$31,800** – Implement network and service account security enhancements for Public Health Services.
- **\$103,657** – Perform security penetration testing of networks managed by ISD.
- **\$15,000** – Configure Web Emergency Operations Center (WebEOC) to monitor and share cyber security alerts with County, State, and Federal agencies.
- **\$194,610** – Purchase crime analysis software for the Sheriff's Office.

- **\$5,076** – Purchase a crime analysis LCD monitor.
- **\$132,150** – Purchase a truck and trailer for Sheriff's Animal Services Unit.
- **\$73,227** – Purchase a truck for the Sheriff's Office Bomb Squad.
- **\$47,234** – Purchase training on combatting violent extremism for multiple County law enforcement agencies.
- **\$19,736** – Purchase law enforcement information and intelligence sharing training for the Lodi Police Department.
- **\$146,180** – Purchase an ALPR for the Stockton Police Department.
- **\$23,129** – Purchase radiological medical response kits for hospitals in the County.
- **\$2,715** – Create and print community readiness fliers.
- **\$113,240** – San Joaquin County Law Enforcement Data Sharing and Crime Analytics Project.
- **\$218,451** – Complete network cybersecurity project for Public Health Services.
- **\$62,623** – Purchase two-way radios for San Joaquin Delta College.
- **\$7,787** – Purchase enterprise social media analysis software.

In 2022-2023, the Department of Homeland Security Grant funds were used to realize the following accomplishments:

- **\$37,357** – Purchased a two-way radio analyzer.
- **\$47,090** – Upgraded the video monitoring system in the County Administration Building to increase security.
- **\$111,927** – Purchased mobile radios for County fire agencies.
- **\$56,118** – Purchased bomb squad equipment for the Sheriff's Office.
- **\$38,748** – Purchased a small waterproof unmanned aircraft system (drone) for the Sheriff's Office.
- **\$9,804** – Continued law enforcement training and tabletop exercises.
- **\$196,865** – Purchased a crisis response van for the Sheriff's Office.
- **\$153,050** – Purchased an ALPR for the City of Stockton.

2026000150—Homeland Security Grants

Environmental Protection

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Grants Administered	3	3	3	3	3
Value of Grants Administered	\$2,476,694	\$2,504,636	\$2,556,804	\$2,524,287	\$2,482,129

# 2026500000—Fish & Game

## Environmental Protection

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Operating Transfers Out</i>	\$600	\$700	\$800	\$800	\$100
<i>Total Appropriations</i>	\$600	\$700	\$800	\$800	\$100
<b>Earned Revenues By Source</b>					
<i>Fines/Forfeitures/Penalties</i>	\$999	\$700	\$800	\$800	\$100
<i>Fund Balance</i>	(399)	0	0	0	0
<i>Total Revenues</i>	\$600	\$700	\$800	\$800	\$100
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

The Fish and Game Program provides funding for the protection and propagation of natural resources as prescribed by State Fish and Game code. This Program is fully supported by fines collected for Fish and Game violations and is operated at a level determined by available funding.

## Program Discussion

The 2023-2024 recommended budget for Fish and Game totals \$800, which is an increase of \$100 from the 2022-2023 adjusted budget. For many years, an annual contribution of \$7,000 from the Fish and Game Special Revenue Fund was made to support the Trout Stocking Program at Oak Grove Regional Park. However, fund balance was depleted in 2020-2021 and is no longer available to support this program. The 2023-2024 budget is balanced using revenue received in the current year.

## Fund Balance

### Fish and Game Fund

Prior to 2021-2022, fund balance in the Fish and Game Special Revenue Fund (#20005) was used to support the Trout Stocking Program. The fund balance as of March 31, 2023 was \$911. There is no fund balance designated for use in the 2023-2024 recommended budget.



# 2026700000—LAFCo Contribution

## Environmental Protection

Jerome C. Wilverding, County Administrator  
[www.sigov.org/commission/lafco](http://www.sigov.org/commission/lafco)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Other Charges &amp; Uses</i>	\$236,400	\$248,220	\$259,638	\$259,638	\$11,418
<i>Total Appropriations</i>	\$236,400	\$248,220	\$259,638	\$259,638	\$11,418
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$236,400	\$248,220	\$259,638	\$259,638	\$11,418

## Purpose

The Local Agency Formation Commission (LAFCo) is established under the provisions of the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (Government Code Sections 56000 - 57550). LAFCos are mandated in each California county to discourage urban sprawl, preserve open space and prime agricultural lands, efficiently provide government services, and encourage the orderly formation and development of local agencies.

The five-member San Joaquin LAFCo consists of two County Supervisors, two Mayors or Councilmembers representing cities, and a member of the general public. The LAFCo operating budget is governed by LAFCo, not by the Board of Supervisors. The County LAFCo budget reflects only the County's contribution, not the portion contributed by cities or other LAFCo revenues.

## Program Discussion

The 2023-2024 recommended County contribution to the Local Agency Formation Commission (LAFCo) totals \$259,638, which is an increase of \$11,418 from the 2022-2023 County contribution, matching the total contribution from the seven cities within the County.

The preliminary LAFCo operating budget for 2023-2024 totals \$597,801, consisting of \$383,711 in salary and benefits, and \$214,090 in operating expenses. Funding is provided by the County's contribution of \$259,638, the contribution from cities totaling \$259,638, and by filing fees and interest totaling \$78,525.

### 2023-2024 Work Program

The LAFCo Work Program will include:

- Process applications for annexations, organizational changes, and out-of-agency service requests.
- Update Municipal Service Reviews (MSRs) and Sphere of Influence (SOI) Plans for the County rural fire districts, Woodbridge Irrigation District, and the East Stockton and Central San Joaquin Water Conservation Districts for their consolidation.
- Finalize the review of the Mountain House Community Services District (CSD) city incorporation application.

- Develop consistent Countywide growth rates, demographic information, and economic development indexes in partnership with the University of the Pacific Eberhardt School of Business, Center for Business and Policy Research.
- Review and update, as needed, operational policies and procedures.

### 2022-2023 Work Program

During 2022-2023, LAFCo completed the MSR and SOI Plan amendments for the cities of Lathrop, Lodi, and Escalon, and the Mountain House CSD. In addition, LAFCo completed 15 out-of-agency service requests and the following projects:

- Tracy Hills Reorganization to the City of Tracy
- College Park III Reorganization to Mountain House CSD
- Lumina, Quaresma, and Dutra Reorganizations to the City of Manteca
- Miller and G&E Te Valde Annexations to South San Joaquin Irrigation District
- Thornton Road and Mariposa Industrial Park Reorganizations to the City of Stockton
- Time Extension of Gudel Annexation to Community Service Area 29



ADOPTED BUDGET

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*Law and Justice*

# Law & Justice

## Appropriations

	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Summary — All District Attorney Budgets</b>	D-5				
2020200000 District Attorney	D-8	\$48,833,693	\$54,251,718	\$54,251,718	\$5,418,025
2020202000 Real Estate Fraud Prosecution	D-17	600,025	657,062	657,062	57,037
2020204000 Family Justice Center	D-19	1,275,856	1,077,115	1,077,115	(198,741)
2020205000 Victim Assistance Center	D-22	799,459	799,459	799,459	0
2020206000 Consumer Fraud Proposition 64	D-24	3,585,886	1,541,471	1,541,471	(2,044,415)
2020209000 Child Abduction Unit	D-27	715,658	436,221	436,221	(279,437)
2020210000 Narcotics Enforcement	D-29	104,677	127,988	127,988	23,311
2020212000 Auto Insurance Fraud Prosecution	D-30	279,838	301,547	301,547	21,709
2020216000 Workers' Compensation Insurance Fraud	D-32	546,277	526,141	526,141	(20,136)
2020217000 Public Assistance Fraud Prosecution	D-34	0	0	0	0
2020278250 Criminal Restitution Program	D-36	191,963	197,721	197,721	5,758
2020281000 State COPS	D-38	250,000	250,000	250,000	0
State Grant Programs	D-39	2,599,130	2,562,105	2,562,105	(37,025)
2020300000 Child Support Services	D-42	22,549,688	24,513,267	24,513,267	1,963,579
2020400000 Public Defender	D-47	22,622,064	24,467,203	24,467,203	1,845,139
2021000000 Grand Jury	D-54	196,655	239,535	239,535	42,880
2021274000 County Support to the Courts	D-56	11,375,595	10,516,311	10,516,311	(859,284)
2021300000 Court Assigned Counsel	D-58	6,022,104	6,546,992	6,546,992	524,888
<b>Summary — All Sheriff Budgets</b>	D-60				
2021602000 Boating Safety	D-64	2,687,706	2,908,521	2,908,521	220,815
2021609000 Sheriff-Cal MMET	D-66	1,217,003	3,920,646	3,920,646	2,703,643
2021614000 Special Services Division	D-69	16,584,638	17,440,974	17,440,974	856,336
2021615000 Mountain House	D-73	2,053,203	2,344,043	2,344,043	290,840
2021619000 Animal Services	D-75	2,790,764	3,007,477	3,007,477	216,713
2021620000 Patrol	D-77	36,492,625	40,692,542	40,692,542	4,199,917
2021622000 Communications	D-81	5,362,982	5,987,199	5,987,199	624,217
2021626000 Detectives	D-83	13,379,421	14,128,422	14,128,422	749,001
2021628000 Records	D-87	5,759,557	6,081,635	6,081,635	322,078
2021635000 Civil	D-90	2,617,946	2,983,301	2,983,301	365,355
2021645000 Administration/Support Services	D-93	17,065,518	20,508,343	20,508,343	3,442,825
2021650000 Lathrop Police Contract	D-98	549,405	0	0	(549,405)
2021658000 Court Services	D-99	13,567,233	14,585,737	14,585,737	1,018,504
2022600000 Custody	D-101	69,957,283	83,413,029	83,413,029	13,455,746
2022610000 Local Community Corrections	D-105	7,237,941	8,357,932	8,357,932	1,119,991
2022620000 Work Programs	D-107	1,298,468	1,474,047	1,474,047	175,579
2025700000 Public Administrator	D-109	725,531	857,423	857,423	131,892
State COPS Patrol & Custody	D-111	2,210,590	2,630,268	2,630,268	419,678

# Law & Justice

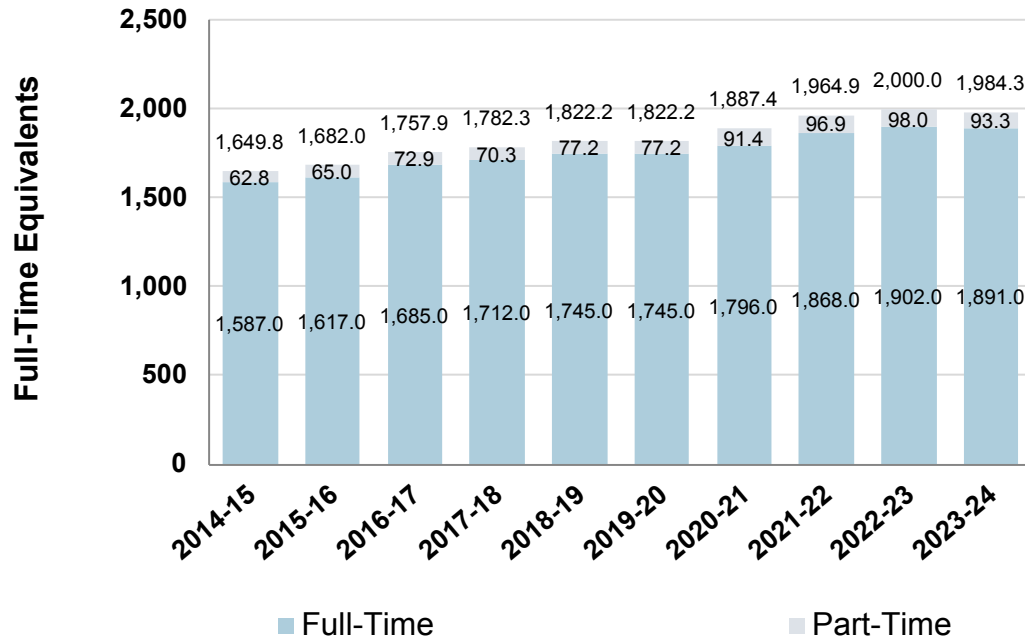
## Appropriations

		Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
	<i>Operational Grants Summary</i>	D-113	649,793	552,391	552,391	(97,402)
	<i>Special Fund Programs</i>	D-115	2,212,671	2,118,350	2,118,350	(94,321)
2022621000	<i>Correctional Health Services</i>	D-118	15,100,328	17,973,239	17,973,239	2,872,911
<b>Summary —</b>	<b><i>All Probation Budgets</i></b>	D-123				
2022700000	<i>Juvenile</i>	D-126	14,667,999	16,942,325	16,942,325	2,274,326
2022702000	<i>Adult &amp; Pretrial Services</i>	D-131	13,840,619	15,071,244	15,071,244	1,230,625
2022702510	<i>Local Community Corrections</i>	D-136	36,920,668	41,929,154	41,929,154	5,008,486
2022745000	<i>Administration</i>	D-141	7,827,204	8,360,046	8,360,046	532,842
2022785000	<i>Juvenile Supplemental Law Enforcement Act</i>	D-144	4,716,600	5,131,214	5,131,214	414,614
2022800000	<i>Juvenile Detention</i>	D-148	20,167,785	23,222,206	23,222,206	3,054,421
	<i>Justice Assistance Grant</i>	D-152	381,101	384,966	384,966	3,865
<b>Total - Law &amp; Justice</b>			<b>\$440,591,150</b>	<b>\$492,018,530</b>	<b>\$492,018,530</b>	<b>\$51,427,380</b>

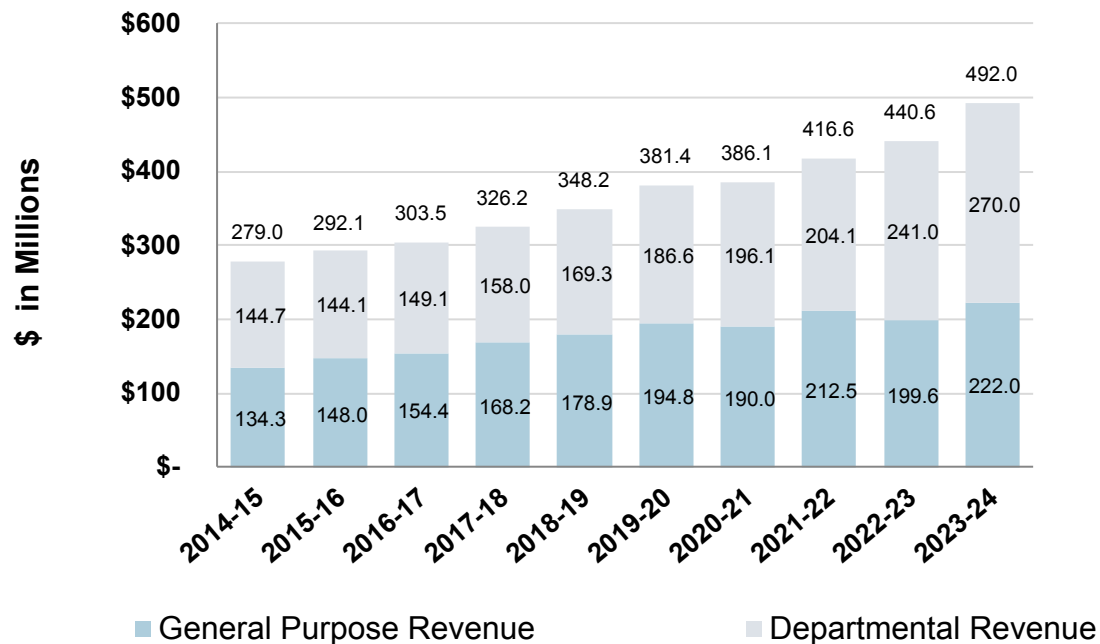
# Law & Justice

## Appropriations

### Staffing Trend



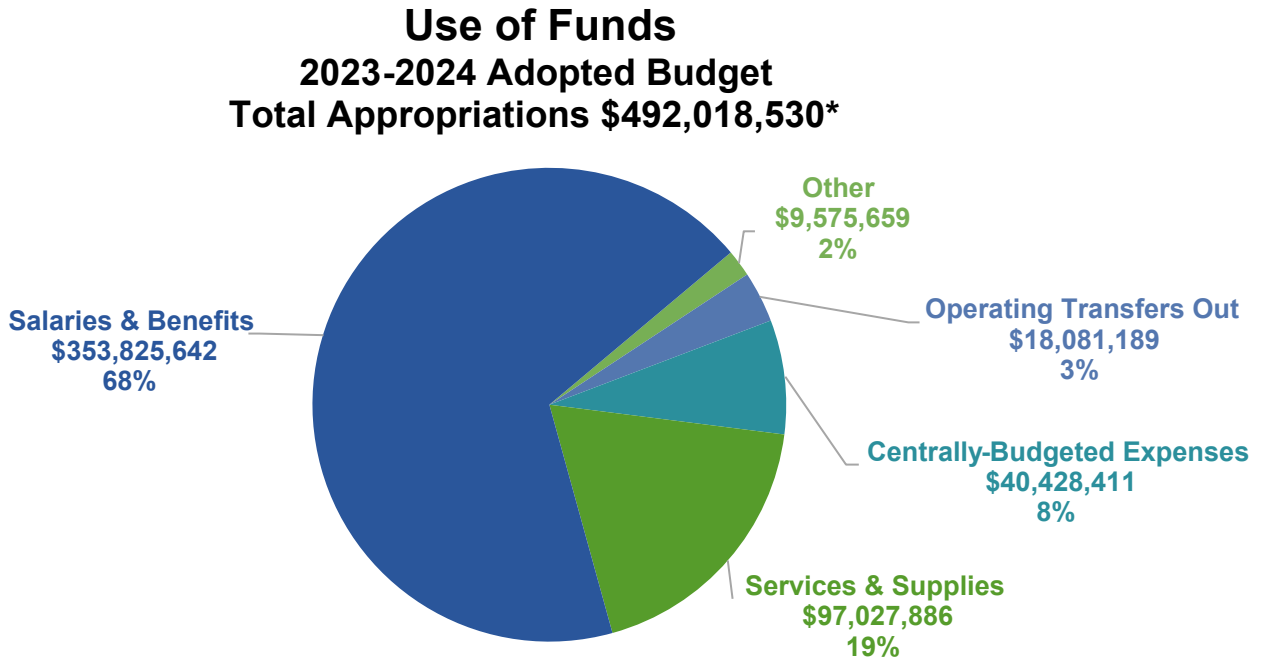
### Appropriations by Source



# Law & Justice

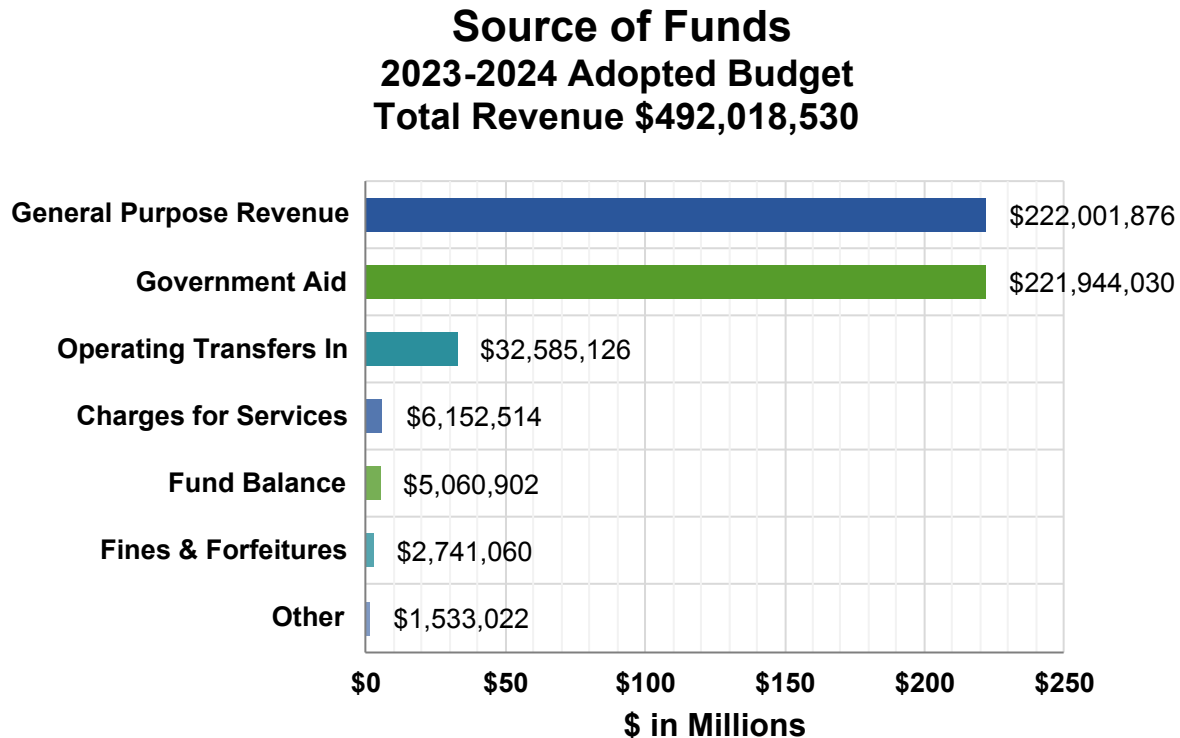
## Appropriations

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\* \$518,938,787 Expenditures less \$26,920,257 Cost Reimbursements

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# Summary – All District Attorney Budgets

## Law & Justice

Ronald J. Freitas, District Attorney  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$45,644,033	\$52,010,184	\$56,114,113	\$56,114,113	\$4,103,929
Services & Supplies	8,254,578	10,009,685	9,510,135	9,510,135	(499,550)
Centrally-Budgeted Expenses	5,629,045	7,160,999	5,869,497	5,869,497	(1,291,502)
Capital Expenditures	146,948	135,000	166,200	166,200	31,200
Operating Transfers Out	100,000	100,000	75,950	75,950	(24,050)
Total Expenditures	\$59,774,604	\$69,415,868	\$71,735,895	\$71,735,895	\$2,320,027
Expenditure Reimbursements	(7,113,020)	(9,633,406)	(9,007,347)	(9,007,347)	626,059
Total Appropriations	\$52,661,584	\$59,782,462	\$62,728,548	\$62,728,548	\$2,946,086
<b>Earned Revenues By Source</b>					
Fines/Forfeitures/Penalties	\$1,883	\$2,400	\$2,400	\$2,400	\$0
Interest/Rents	1,313	2,000	4,000	4,000	2,000
Aid From Other Governments	16,300,146	17,504,705	20,490,775	20,490,775	2,986,070
Charges For Services	243,915	155,000	265,000	265,000	110,000
Miscellaneous Revenues	319,892	104,677	224,249	224,249	119,572
Operating Transfers In	6,206,310	5,778,861	3,563,882	3,563,882	(2,214,979)
Total Revenues	\$23,073,459	\$23,547,643	\$24,550,306	\$24,550,306	\$1,002,663
<b>Net County Cost</b>	\$29,588,125	\$36,234,819	\$38,178,242	\$38,178,242	\$1,943,423
<b>Allocated Positions</b>	286.0	301.0	297.0	297.0	(4.0)
<b>Temporary (Full-Time Equivalent)</b>	11.0	10.0	10.5	10.5	0.6
<b>Total Staffing</b>	297.0	311.0	307.5	307.5	(3.4)

## Purpose

The Office of the District Attorney (DA) is a constitutionally-mandated office whose primary function is to act as the public prosecutor of State law violations. To this end, the DA investigates such offenses and conducts collaborative investigations with local law enforcement agencies. This is a summary of the budgets administered by the District Attorney's Office:

- 2020200000 District Attorney
- 2020202000 Real Estate Fraud Prosecution
- 2020204000 Family Justice Center
- 2020205000 Victim Assistance Center
- 2020206000 Consumer Fraud Proposition 64
- 2020209000 Child Abduction Unit
- 2020210000 DA Narcotics Enforcement
- 2020212000 Auto Insurance Fraud Prosecution
- 2020216000 Workers' Compensation Insurance Fraud
- 2020217000 Public Assistance Fraud Prosecution
- 2020278250 Criminal Restitution Program
- 2020281000 DA State COPS
- State Grant Programs

# Summary – All District Attorney Budgets

## Law & Justice

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Work with HR to improve the Department's vacancy rate by increasing retention through identifying retention strategies and the consideration of classification structure.	16%	10%	June 2024
	10%	5%	June 2025
Augment Digitization and Automation	Current	Target	Deadline
➤ Expand "file less/paperless" aspects of Karpel Case Management System by scanning and automating historic case files, eliminating the need for storage space at the County Record Center and Kress Building.	2%	70%	June 2024
	70%	90%	June 2025
Public Safety/Criminal Justice/Quality of Life	Current	Target	Deadline
➤ Increase awareness of the dangers of Fentanyl and Driving Under the Influence (DUI) by creating media campaigns targeting students ranging from ages 14 to 24.	0	2 campaigns/per year	June 2024
	2	5 campaigns/per year	June 2025
➤ Expand the Project Navigate Constructive Change (PNCC) program to include youthful offenders under the age of 19 to fill gaps of interaction within the juvenile system.	0	20 participants	June 2024
	20 participants	35 participants	June 2025

#### Proposition 172

In 1993, Proposition 172 established a permanent Statewide half-cent sales tax to provide funding for qualifying public safety programs. Funds are collected by the State Board of Equalization and apportioned to each county based on its proportionate share of Statewide taxable sales.

AB 2788 created a Maintenance of Effort (MOE) provision requiring cities and counties to maintain funding levels to public safety programs that receive Proposition 172 funds. AB 2788 also established 1992-1993 as the MOE base year and required an adjustment to MOE levels based on the annual change in Proposition 172 revenues. In 1992-1993, the total for all qualifying budgets in the County was \$68,997,254 (base year).

The current program allocation formula for the County was established by the Board of Supervisors on May 24, 1994 (B-94-613), which allocates Proposition 172 revenue to the Sheriff (68.1%), Probation (13%), District Attorney (11%), and the Public Defender/Court Assigned Counsel (7.9%).

In 2022-2023, the MOE for all qualifying public safety programs was \$156,398,835. The County's adjusted AB 2788 Certification for 2022-2023 was \$270,750,814. Overall, the General Fund provided overmatching funds of \$114,351,979 to all qualifying public safety programs. Not all budgets are included for each public safety department.

The DA's portion of the MOE was \$17.6 million. The chart below illustrates that County General funds provided approximately \$29.4 million above the required MOE for 2022-2023.

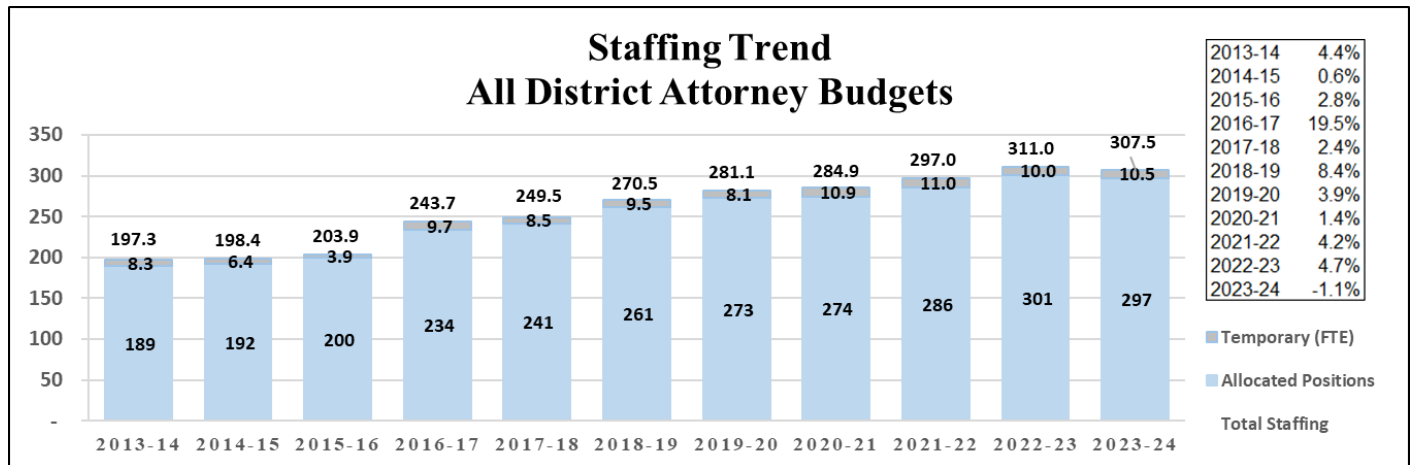


# Summary – All District Attorney Budgets

## Law & Justice

### Public Safety Fund (Proposition 172) – AB 2788 Maintenance of Effort

District Attorney	2022-2023 Adopted	AB 2788 Adjustments				Adjusted AB 2788	1992–1993 Base Year	Prop 172 MOE	Overmatch
		State/Federal Grant	Charges for Services	Trust Fund	Fixed Assets				
Administration	48,723,813	(515,302)	(150,000)	(1,540,000)	(120,000)	46,398,511	7,629,626	17,294,378	29,104,133
Victim/Witness Program	2,188,504	(1,561,726)	0	0	0	626,778	138,634	314,247	312,531
<b>Total</b>	<b>50,912,317</b>	<b>(2,077,028)</b>	<b>(150,000)</b>	<b>(1,540,000)</b>	<b>(120,000)</b>	<b>47,025,289</b>	<b>7,768,260</b>	<b>17,608,625</b>	<b>29,416,664</b>



# 2020200000—District Attorney

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$36,806,919	\$41,316,720	\$47,051,796	\$47,051,796	\$5,735,076
Services & Supplies	4,844,222	5,992,777	5,957,416	5,957,416	(35,361)
Centrally-Budgeted Expenses	5,391,872	6,895,605	5,018,470	5,018,470	(1,877,135)
Capital Expenditures	102,826	120,000	166,200	166,200	46,200
Total Expenditures	\$47,145,839	\$54,325,102	\$58,193,882	\$58,193,882	\$3,868,780
Expenditure Reimbursements	(3,841,484)	(5,491,409)	(3,942,164)	(3,942,164)	1,549,245
Total Appropriations	\$43,304,355	\$48,833,693	\$54,251,718	\$54,251,718	\$5,418,025
<b>Earned Revenues By Source</b>					
Fines/Forfeitures/Penalties	\$1,883	\$2,400	\$2,400	\$2,400	\$0
Aid From Other Governments	11,617,024	11,328,250	14,854,539	14,854,539	3,526,289
Charges For Services	243,915	155,000	265,000	265,000	110,000
Operating Transfers In	1,552,929	1,649,880	1,465,349	1,465,349	(184,531)
Total Revenues	\$13,415,751	\$13,135,530	\$16,587,288	\$16,587,288	\$3,451,758
<b>Net County Cost</b>	\$29,888,604	\$35,698,163	\$37,664,430	\$37,664,430	\$1,966,267
<b>Allocated Positions</b>	210.0	225.0	236.0	236.0	11.0
<b>Temporary (Full-Time Equivalent)</b>	5.7	8.5	10.5	10.5	2.1
<b>Total Staffing</b>	215.7	233.5	246.5	246.5	13.1

## Purpose

The Office of the District Attorney (DA) is a constitutionally-mandated office whose primary function is to act as the public prosecutor of State law violations. To this end, the DA investigates such offenses and conducts collaborative investigations with local law enforcement agencies.

The DA also establishes policies and standards for filing criminal complaints, institutes proceedings for the arrest of persons suspected of public offenses, advises the Grand Jury, institutes criminal and/or civil proceedings to remedy consumer fraud, abates nuisances and environmental hazards, manages various grant programs, provides services to victims and witnesses of crime, and provides legal training for local law enforcement agencies.

The DA's Bureau of Investigations provides investigative support to the Department. The Bureau is also responsible for the service of criminal and civil processes.

## Major Budget Changes

### Salaries & Employee Benefits

- \$3,796,217 Salary and benefits adjustments.
- \$1,279,133 Add 10 new positions.
- \$367,421 Transfer one Chief Deputy District Attorney from Consumer Fraud Unit.
- \$300,529 Increase in extra-help.
- (\$8,224) Decrease in overtime.

# 2020200000—District Attorney

## Law & Justice

### Services & Supplies

- \$725,000 Increase in special department expense due to implementation of Sicuro analytics.
- \$232,600 Increase in fleet services costs.
- \$65,000 Increase in jury and witness costs.
- \$57,000 Increase in labor charges.
- \$55,500 Increase in rent expense.
- \$53,000 Increase in communications, cell phone, and utility costs.
- \$36,250 Increase in copy machine costs.
- (\$820,952) Decrease in professional and consultant services for the Ready to Work program and the Project Navigate Constructive Change (PNCC) program.
- (\$184,360) Decrease in law enforcement equipment costs.
- (\$91,495) Decrease in security service costs.
- (\$61,511) Decrease in small tools, office supplies, and furniture.
- (\$57,340) Decrease in software and related expenses.
- (\$36,000) Decrease in parking expense.
- (\$17,500) Decrease in publications and legal notices costs.
- (\$15,000) Decrease in court reporting services.

### Centrally-Budgeted Expenses

- \$299,648 Increase in Workers' Compensation and Casualty insurance costs.
- \$41,782 Increase in radio maintenance costs.
- \$33,706 Increase in rents and leases of automation equipment.
- (\$182,004) Decrease in data processing charges.
- (\$2,070,267) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$166,200 Vehicles (3).

### Expenditure Reimbursements

- \$46,461 Increase in reimbursement of costs related to reducing recidivism and related activities.
- \$31,759 Increase in reimbursement from Human Services Agency.
- (\$941,914) Decrease due to change in accounting.
- (\$685,551) Decrease in reimbursement from other DA budgets due to decrease in labor costs and administrative charges.

### Revenues

- \$1,612,138 Increase in Proposition 172 funding.
- \$941,914 Increase due to change in accounting.
- \$713,750 Increase in State funding for grant programs.
- \$258,487 Increase in Federal funding for grant programs.
- \$110,000 Increase in charges for legal services.

### Operating Transfers In

- (\$183,930) Decrease in transfers from Auto Theft Investigation Prosecution Fund (#12124) and Narcotics Enforcement Fund (#20034).

## Program Discussion

The 2023-2024 recommended District Attorney (DA) main budget totals \$58,193,882 which is an increase of \$3,868,780 from the 2022-2023 adjusted budget.

The recommended budget adds 10 new full-time positions as follows:

Position	# Added
Accounting Technician I	1
Administrative Assistant I	1
Crime Analyst	1
DA Investigative Assistant I	1
DA Investigator I	1

# 2020200000—District Attorney

## Law & Justice

Position	# Added
Dept. Information Systems Analyst III	1
Dept. Information Systems Specialist III	1
Dept. Information Systems Manager	1
Office Technician/Coordinator	1
Victim Witness Advocate III	1
<b>Total</b>	<b>10</b>

### Felony Trial Unit

The Felony Trial Unit is responsible for the review, charging, and prosecution of all mainline criminal felony cases heard in San Joaquin County courts. Mainline criminal felony cases include assault and other violent crimes, serious and violent theft-related offenses such as robbery, carjacking, residential burglary, vehicle theft, and illegal possession of weapons cases.

The Unit has two supervising Deputy District Attorneys who are responsible for the supervision of 19 prosecutors covering San Joaquin County.

Collectively, the Felony Mainline Units appear on hundreds of cases weekly, preparing for an average of 80 cases set for preliminary hearings on a monthly basis, with a weekly average of 5-10 cases set for jury trial.

Following effects of the COVID-19 pandemic, the number of cases handled by the Felony Mainline Unit continues to increase. This is demonstrated by the completion of eight jury trials during the first quarter of 2023.

Mainline Unit prosecutors also appear in the Collaborative Courts with a focus towards alternative legal remedies to cases involving substance abuse, mental health cases, veterans, and parole re-entry cases.

### Circuit Unit

Four DAs are assigned to originating cases in the southern jurisdictions of San Joaquin County, including Tracy, Manteca, Lathrop, Ripon, and Escalon. The Circuit Unit handles misdemeanor and felony cases through the preliminary hearing stage, at which time they are transferred to the Felony Mainline Unit if they are set for jury trial.

### Misdemeanor Trial Unit (MTU)

The Misdemeanor Trial Unit currently has 11 prosecutors assigned to handle misdemeanor cases involving domestic violence, driving under the influence, assaults, thefts, drug possession, and vandalism.

The Unit has one Supervising Deputy District Attorney who is responsible for the oversight, training, and development of the Unit prosecutors. Similar to their felony counterparts, the

misdemeanor prosecutors appear on multiple court calendars and handle motion hearings and cases set for jury trial on a weekly basis. This Unit averages 20-25 jury trials a week.

### Gang Violence Suppression Unit (GVSU)

The GVSU prosecutes individuals and groups who commit and drive serious and violent crimes in the County. As the lead agency in the County's Gang Task Force, the GVSU fosters collaboration and information sharing between and among the local, State, and Federal law enforcement agencies who investigate violent, gun, drug, and human trafficking crimes committed by criminal street gangs and similar groups in the County. Through the Task Force, GVSU members provide education and training to law enforcement regarding changes in the law and stay apprised of changes in gang rivalries, alliances, and criminal behavior on the streets, in the jails, and prisons.

In addition to prosecution, the GVSU has a leading role in efforts aimed at gang crime prevention and intervention. Members of the Unit are actively involved in leading and contributing to community discussions regarding the dangers and risks related to gang crime and gang violence. Another example of the Unit's important community engagement is its active participation in the City of Stockton's Project Ceasefire program, aimed at combatting Stockton's longstanding firearm-related violence problems.

GVSU's supervising Deputy District Attorney participates in Ceasefire call-in presentations and meal sharing with individuals at high risk of gun violence. Through partnerships with the Stockton Police Department and other community agencies and organizations, GVSU assists with the reduction of homicides, non-fatal shootings, and gang-related homicides.

In 2022, through designated prosecutor and paralegal roles, GVSU participated in a large-scale operation with Stockton Police Department and California Department of Justice Investigators to identify and disrupt gun violence involving members of a gang active within the city of Stockton. That investigation resulted in the prevention of several shootings, solved two homicides, and seizure of multiple firearms possessed illegally by gang members.

### Homicide Unit

The Homicide Unit reviews, charges, and prosecutes murders and other unlawful killings, including cold-case murders. Cases prosecuted by this Unit involve some of the most violent and heinous crimes committed within the County. These cases involve substantial trial preparation and are assigned to some of the most senior prosecutors in the District Attorney's Office. Trial evidence almost always involves the use of forensic evidence, social media evidence,

# **2020200000—District Attorney**

## **Law & Justice**

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and often civilian witnesses that are reluctant to testify. Homicide prosecutors are required to have commanding knowledge of the most complex legal analysis as well as DNA, ballistics, tool mark comparison, forensic pathology, and social media analysis. Homicide prosecutors work closely with the Office of the Medical Examiner, experts from the Department of Justice Laboratory, law enforcement agencies, and the Bureau of Investigations. Homicide prosecutors are also required to work closely with advocates in the DA's Victim Witness Unit to provide information and support to the decedent's next of kin.

As of early 2023, the Homicide Unit is prosecuting 94 open murder cases, which involve 127 charged defendants. Some of the murder cases are prosecuted within the Homicide Unit, while others are prosecuted by Deputy DAs assigned to other units. Homicide Unit prosecutors average 13 murder cases in a docket.

It is the goal of the Homicide Unit to prosecute a murder case within 18 months of the date of the murder, although case complexity and date of suspect arrest may impact that goal. In 2022, Homicide Unit prosecutors completed 15 murder trials to verdict. It is anticipated this number will increase in 2023.

In addition, the Homicide Unit tracks and assigns parole hearings for inmates that are subject to formal parole hearings. These hearing are evidentiary hearings which occur between the inmate and counsel, a representative of the District Attorney's Office, and the Commissioners of the California Parole Board. In 2022, the District Attorney's Office appeared at 115 parole hearings.

### **Bureau of Investigation (BOI)**

The Bureau of Investigations (BOI) is comprised of approximately 50 Investigators who work collaboratively with the Department's prosecutors and staff members to initiate, support, and assist the overall work of the District Attorney's Office. Along with their Chief of Investigations, Lieutenants, and Sergeants, the BOI Investigators bring their extensive enforcement experience to assist with case evaluation, preparation, and further investigative efforts, all necessary steps to bring an offender to justice, assist victims of crime, and bring effective investigations to court in a timely fashion.

Members of the DA's Bureau of Investigations team garner their experience from a number of local and Statewide agencies, which creates a dynamic and well-versed investigative body; one that lends value to case prosecutions and innovative thinking to any law enforcement effort. The BOI supports regional crime reduction efforts, often collaborating with local, State, and Federal law enforcement agencies on joint case investigations and through

participation on task forces focused on the reduction and elimination of specific types of crimes.

The BOI is the primary and sole law enforcement agency in the County charged to conduct investigations of child abduction, public assistance and in-home supportive services fraud, real estate fraud, violations of public integrity laws, environmental and consumer crimes, witness relocation, and significant cold case investigations.

The BOI has a strong partnership with all County law enforcement agencies regarding officer-involved critical incident protocol. The County's protocol was recently signed and renewed and offers a method of investigation that is unique, time tested, and extremely effective. The BOI co-investigates these events in real time and assists in finding the facts. Each team member is specially trained and prepared to work these dramatic events bringing experience and focus to the investigations.

### **Public Integrity Unit**

The Public Integrity Unit was formed to investigate complaints of corruption, abuse of authority, and breach of public trust by elected, appointed, and/or hired public officials to prevent criminal and unethical behavior. The Unit is comprised of a Lieutenant, Sergeant, Criminal Investigator, and Investigative Assistant. As needed, additional Criminal Investigators will assist with public corruption cases. Cases are handled and investigated with the utmost professionalism, ethics, and integrity. Members of this Unit are highly-qualified trained law enforcement officers with years of experience as detectives/Investigators.

In 2023, the Unit received and investigated 127 complaints via the DA's Office online formal complaint process and messages sent to the Public Corruption email address. The incoming complaint forms and email messages to the Unit are monitored continuously, and each complaint is reviewed and assessed. Not all complaints result in investigations for various reasons, including lack of information, a complaint does not entail an actual crime, no basis for legal intervention and/or prosecution, information is referred to an outside agency, or initial follow-up was conducted but further action is deemed futile.

The Unit continues to be proactive with community outreach through presentations and education, implementing a simplified online reporting process/complaint form, and ease of reporting via email, telephone, and written complaints mailed to the DA's Office.

Since many complaints pertain to prominent public figures and/or public employees, these investigations often act as a deterrent and hold people accountable for their actions.

# 2020200000—District Attorney

## Law & Justice

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### Delta Regional Auto Theft Team (RATT)

The District Attorney partners with the Delta Regional Auto Theft Team (Delta RATT) to investigate and prosecute crimes occurring on County highways. The team consists of members from California Highway Patrol (CHP), San Joaquin County Sheriff's Office, Stockton Police Department, Lodi Police Department, Manteca Police Department, San Joaquin County Probation Department, and the DA's Bureau of Investigations. The DA's Office has a dedicated prosecutor assigned to assist Delta RATT Investigators. In 2022 alone, this Office prosecuted over 50 individuals who were investigated by Delta RATT for diverse crimes such as auto theft, carjacking, acts constituting road rage, and identity theft.

### Family Crimes Unit (FCU)

Prosecutors assigned to the FCU are responsible for the vertical prosecution of all felony domestic violence, elder and child abuse, adult and child sexual assault, sexually violent predators, and sex offender failure to register cases.

- **Domestic Violence (DV)** – Deputy DAs review, charge, and prosecute felony cases in which the victim is the offender's spouse or former spouse, cohabitant or former cohabitant, parent of the offender's child, or with whom the offender has or had a dating relationship. These attorneys handle all DV felonies, including most DV homicide cases.
- **Child Abuse and Sexual Assault (CASA)** – Deputy DAs charge and prosecute felony cases involving physical and sexual abuse crimes against children, sexual abuse crimes against adults, and sex offender failure to register cases. These Deputy DAs also prosecute most cases involving child homicide victims.
- **Elder Abuse Unit** – Deputy DAs are responsible for prosecuting felony crimes against elderly and dependent adult victim, including most homicides involving elderly victims.
- **Child Abduction Team (CAT)** – The CAT investigates, locates, and recovers abducted children and prosecutes the responsible perpetrators.
- **Sexually Violent Predator Prosecutions (SVP)** – The SVP Deputy DA prosecutes convicted sex offenders who have served their custody time and are deemed an unreasonably high-risk to commit another sex crime, and seeks to have them committed or recommitted to a State hospital.

The FCU Deputy DAs are responsible for assisting the Family Justice Center (FJC). The FJC is a one-stop location for victims of family crimes to access the outstanding service

providers within the community. A Deputy DA from the FCU is available Monday through Friday to assist victims and witnesses with their cases, and to assist law enforcement and other DA staff with issues that arise at the FJC.

The FCU engages in community outreach and education on child abuse, sexual assault and consent, dating violence prevention, elder fraud prevention, human trafficking, and sex offender registration compliance. Outreach and education presentations are conducted regularly for schools, community organizations, faith-based communities, youth programs, law enforcement, and civic groups.

### Grant Operations and Consumer Fraud/ Environmental Prosecution Unit

The Grant Operations and Consumer Protection Unit uses both criminal and civil prosecution tools to address harms that directly affect the daily lives of the citizens of San Joaquin County. Investigations and prosecutions include, but are not limited to, environmental protection, consumer fraud, insurance fraud, identity theft, auto theft, rural crimes, and animal abuse.

#### *Consumer Fraud/ Environmental Protection Unit*

Cases involving environmental harm and consumer fraud are prosecuted under the Consumer Fraud Proposition 64 budget (#2020206000). The DA's Environmental Protection Unit (EPU) enforces local and State environmental regulations. Investigations and prosecutions include matters of unique local concern, as well as matters that may have impacts across multiple county jurisdictions. EPU work requires productive and efficient collaboration with many other local and State agencies such as Public Health Services, the Environmental Health Department, the Agricultural Commissioner's Office, the Department of Toxic Substances Control, and the California Department of Fish and Wildlife.

In 2022-2023, this Unit sought to expand its efforts in Occupational Safety and Health Administration (OSHA) violations, looking at the safety of working conditions for workers in San Joaquin County. Most EPU cases are handled via civil prosecution. Cases involving consumer fraud may be prosecuted civilly or criminally, and require positive working relationships with local and State agencies such as the Contractors State Licensing Board, California State Bar, Bureau of Automotive Repair, Division of Measurement Standards, and Alcohol Beverage Control.

#### *Insurance Fraud Unit*

During 2022-2023, the DA's Insurance Fraud Unit will have received approximately 25-30 new referrals of automobile and workers' compensation fraud, in addition to over 50 ongoing investigations. These investigations require many hours of work by DA Investigators and collaboration

# **2020200000—District Attorney**

## **Law & Justice**

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with the California Department of Insurance to assemble and organize the voluminous evidence in preparation for criminal prosecution.

### ***Animal Cruelty Unit***

The DA's Office Bureau of Investigations (BOI) currently has one Investigator assigned to animal cruelty investigations. This Investigator assists the assigned prosecutor with animal cruelty prosecutions and trial preparation, and acts as a liaison between law enforcement and animal control services. These investigations involve a high level of experience, expertise, and interaction and collaboration with other County and city agencies. As of March 31, 2022, the BOI has received 12 animal cruelty referrals, of which five resulted in criminal charges being filed, three declinations, and four cases still pending investigation with a possible charging decision. The investigations involve unlicensed veterinarians practicing veterinary medical services and willful cruelty to animals including neglect, starvation, physical abuse, and lack of medical care.

This Office also formed a Countywide animal cruelty task force, which includes all County law enforcement and animal services agencies. The task force meets monthly to discuss animal cruelty cases and investigations. The assigned prosecutor discusses the requirements for successful filing and prosecution of animal cruelty cases.

### **Identity Theft Unit**

The DA's Office continues to aggressively investigate and prosecute identity theft. The team consists of three Deputy DAs, an Investigator, an Investigative Assistant, as well as clerical and paralegal support.

Identity (ID) theft investigations and prosecutions are often voluminous and lengthy. One case may target dozens or even hundreds of unsuspecting victims. Each unique case requires direct contact with a minimum number of victims to ensure successful prosecution. In addition to preparing for court, attempts are also made to contact every known victim and provide them with information to assist them in being able to protect themselves from additional harm. Until contacted by a DA Investigator, victims may not realize their identities have been stolen and utilized to make illegal purchases including vehicles, open credit cards and accounts, secure loans, offer items for sale they do not own, and steal deposits or rents.

The ID Theft Unit employs a proactive approach that targets and monitors known identity theft criminals; and individuals on probation and parole, identifies active and past participants in the County, and monitors the dark web for victim profiles. By the end of 2022-2023, it is anticipated the

Unit will file approximately 50 new felony cases (in addition to cases that carry over from 2021-2022), representing 60 defendants and over 400 individual and business victims. Referrals are submitted to the DA's Office from multiple law enforcement agencies including the police departments in Lodi, Manteca, Ripon, Stockton, and Tracy, CHP, Delta Regional Auto Theft Task Force, the Sheriff's Office, and the United States Postal Service.

The DA's Office leads the ID Theft Task Force, which includes members from all local law enforcement agencies in the County, as well as State and Federal agencies like the CHP and postal inspectors from the United States Postal Service.

The San Joaquin County District Attorney fights fraud committed against the Employment Development Department (EDD), which is often connected to ID theft cases. Like ID theft, EDD fraud investigations are extremely complex and time consuming. The DA's office partnered with other counties and the State to create an EDD task force. Because of the efforts of its prosecutors, investigators and support staff, the San Joaquin County District Attorney's Office has been reimbursed over \$50,000.

### **San Joaquin County Fireworks Task Force**

Every Fourth of July season, illegal fireworks create physical and psychological hazards for the citizens of San Joaquin County. Unnecessary injuries and property damage are combined with the emotional toll taken by residents and even animals forced to contend with these destructive devices.

San Joaquin County Fireworks Task Force, organized by the DA's Office, is committed to prosecuting those who sell, purchase, or are in possession of illegal fireworks. All local law enforcement agencies and fire districts are invited to participate. In advance of the Fourth of July, the Task Force typically starts meeting in April or May and concludes after the holiday. The goal of the Task Force is to share best practices in an effort to reduce illegal fireworks activity. This may include investigation strategies, legal updates, and public outreach. Outreach efforts during 2022-2023 were plentiful and vigorous, including the use of social media, community events, yard signs, and a joint press conference with the San Joaquin County Sheriff's Office to announce the seizure of nearly 10,000 pounds of illegal fireworks removed from the streets.

During 2022-2023, the San Joaquin County District Attorney's Office filed nearly 40 misdemeanor or felony complaints against individual defendants possessing illegal fireworks. It is expected this coming Fourth of July season will bring a similar number of complaints and cases. Continued collaboration between the DA's Office, law enforcement, fire departments, CAL FIRE, and the use of



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## Law & Justice

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targeted ordinances, like “social host doctrines,” that hold property owners liable for illegal fireworks activity on their property will provide a deterrent to this dangerous activity.

### Juvenile Justice Unit

The Juvenile Justice Unit is responsible for reviewing and prosecuting all referrals for juvenile criminal activity committed in the County. This includes screening cases for informal supervision, diversion, and certification to adult court in specific, limited circumstances.

In addition to these responsibilities, the Unit has been instrumental in creating and implementing a number of specialized programs designed to meet the needs of youthful offenders while furthering the primary mission of rehabilitation and community safety. These programs include highly acclaimed intervention programs and alternatives to traditional prosecution such as Project Navigate Constructive Change (PNCC) and Reducing Racial and Ethnic Disparities (RRED). PNCC is a diversion program for youth and young adults ages 15 to 30. It utilizes evidence-based practices and positive youth development principles to motivate participants to succeed, and not to reoffend. RRED is a joint collaboration of law enforcement, County organizations, and community groups with the goal of reducing racial and ethnic disparities within the dependency and criminal justice systems.

The Unit has fairly and reasonably implemented the provisions of voter-approved propositions. Specifically, serious, violent, and repeat offenders are prosecuted in Juvenile Court, or, when appropriate, in the adult division of the Superior Court. In contrast, first-time, low-level offenders are offered an opportunity to participate in the very successful PNCC diversion program or other alternative resolution programs. Youth who enter these programs can have their record sealed upon meeting certain court-ordered conditions, such as obeying all laws, paying restitution, participating in counseling, attending school, and completing community service hours.

The DA’s office has been awarded another round of funding spanning over a three year period. The first year of funding in the amount of \$941,914 is budgeted in 2023-2024.

### Post-Conviction Review Unit (PCRU)

The Post-Conviction Review Unit (PCRU) was created in January 2019 to address a myriad of re-sentencing laws. The significant mandated legal changes are as follows:

#### *Assembly Bill 2942 – DA Discretionary Resentencing Recommendations*

Assembly Bill (AB) 2942, adopted as Penal Code 1172.1, allows the Office of the District Attorney to recall any

sentence at any time, and re-sentence that defendant to any legal sentence provided it is less than the sentence to which that defendant was originally sentenced. The DA’s Office currently has 130 pending requests for resentencing.

#### *Senate Bill 483 – Elimination of Prison Prior Convictions*

Senate Bill (SB) 483 repealed the use of one-year prison priors pursuant to Penal Code 667.5(b) in sentencing law. As such, any person serving time in custody may petition the court to dismiss the one-year prior. That request is mandated by law and is not opposed by the DA’s Office. However, the courts have interpreted that upon this re-sentence, the inmate is allowed to request re-sentencing on the entirety of the sentence including re-litigating the sentencing on the principal term, firearms enhancements (PC 12022.5/12022.53(b)(c)(d)), five-year priors (PC 667(a)), and strike priors (PC 1192.7/667). This re-sentencing often involves significant consumption of resources. During 2022-2023, the DA’s Office handled 130 open SB 483 cases and has litigated 171 SB 483 cases.

#### *Senate Bill 1437 – Felony Murder Rule, Natural and Probable Consequences Liability Resentencing*

Senate Bill (SB) 1437 eliminated certain liability for felony murder (Penal Code §189) convictions, as well as the natural and probable consequences liability. As such, SB 1437 allows for any inmate convicted by plea or by trial to murder, manslaughter, or attempted murder to petition the court for a re-sentencing by submitting a formal letter to the court. Upon filing of said petition, the PCRU is tasked with re-litigating the theory of liability of every case, many of which are decades old. The PCRU is currently handling 147 SB 1437 cases.

#### *Youthful Offender Sentencing Hearing (Franklin Hearings)*

The courts, in *People v. Franklin*, stated in essence that a defendant may present evidence relevant to a parole hearing within the confines of a sentencing hearing. The DA’s Office does not track the number of Franklin Hearings, as many of these hearings are incorporated within the re-sentencing of the SB 483 and SB 1437 hearings.

#### *Proposition 57 – Inmate Request for Early Release*

The provisions of Proposition 57 allow the California Parole Board to release inmates upon completion of significantly less time than they were originally sentenced by plea agreement or after trial. The Parole Board allows the DA’s office to comment on the early release request. The District Attorney’s Office opposed 76 Proposition 57 early releases in 2022-2023. Of those requests, 70 were for early release and denied by the Parole Board.



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In addition, the PCRU reviews Officer-Involved Shootings (OIS), Critical Incidents (CI), and Protocol Incidents in conjunction with the Bureau of Investigations, the California Department of Justice, and local law enforcement agencies. Currently, the PCRU is reviewing 13 open OIS/CI/Protocols.

### Supplemental Requests

The DA is requesting additional funding of \$1,942,283 for the following:

#### *Administrative Assistant I*

Funding of \$106,908 is requested to add an Administrative Assistant I to address the additional workload related to an increase in staffing levels and support the administrative team.

#### *Accounting Technician I*

Funding of \$91,043 is requested to add an Accounting Technician I to the DA's fiscal unit to manage grants and search for additional funding/grants to reimburse new and current DA operations.

#### *Victim Witness Advocate III*

Funding of \$114,911 is requested to add an additional Victim Witness Advocate III to act as a team lead and develop, implement, manage, and evaluate training plans for the Victim Witness program.

#### *District Attorney Investigator*

Funding of \$229,370 is requested to add one District Attorney Investigator I/II that will be dedicated to the County Agriculture, Gangs, Narcotics, and Property (AGNET) Unit, specializing in crime related to agriculture, gangs, narcotics, and rural property.

#### *District Attorney Investigative Assistant*

Funding of \$95,501 is requested to add one District Attorney Investigative Assistant I/II to support digital and electronic information harvesting related to cellular devices and assist in real-time search and seizures at active crime scenes.

#### *Office Technician Coordinator*

Funding of \$84,674 is requested to add one Office Technician Coordinator to support the Family Justice Center (FJC) with monitoring and managing staffing at the FJC and serve as a backup for court appearances, front desk duties, intake interviews, and working with agency partners.

#### *Departmental Information Systems Team (3 Positions)*

Funding of \$494,876 is requested to add three positions to the DA's information systems unit. Funds will support one Departmental Information Systems Specialist III, one Departmental Information Systems Analyst III, and one Departmental Information Systems Manager. These positions will enhance current specialized law enforcement services and support the implementation of the new data analytics software, Sicuro.

#### *Sicuro Criminal Justice Data Analytics Software*

Funding of \$725,000 is requested to implement the Sicuro Data Analytics system designed to act in accordance with California's Racial Justice Act. The Sicuro software will assist the DA's office with compliance of the Justice Data Accountability and Transparency Act. Implementation will occur in three phases. Funding of \$600,000 will be designated for implementation and \$125,000 for ongoing support services.

The recommended budget has been augmented by \$1,942,283 to address these requests.

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### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Felony Filings</b>					
Countywide	3,761	4,915	4,678	4,540	4,956
Stockton	2,515	3,409	3,118	3,086	3,216
Lodi	414	459	539	476	432
Manteca/Ripon/Escalon/Tracy	832	1,047	1,021	978	1,308
<b>Misdemeanor Filings</b>					
Countywide	10,134	8,894	8,595	7,610	9,546
Stockton	6,145	5,131	4,813	4,072	5,952
Lodi	1,344	1,438	1,484	1,250	1,080
Manteca/Ripon/Escalon/Tracy	2,645	2,325	2,298	2,288	2,514
<b>Traffic*</b>					
Countywide	8,298	2,039	1,649	N/A	N/A
Manteca/Ripon/Escalon/Tracy	1,314	936	693	N/A	N/A
Stockton	6,984	1,103	956	N/A	N/A
<b>Parole/Probation/Transfer in Filings</b>					
Countywide	489	551	539	658	570
Post Release Community Supervision	231	336	278	334	216
Parole Supervision	103	92	117	116	90
Transfer In	155	123	144	208	264
<b>Juvenile Filings</b>					
Countywide	797	612	741	586	582
Felony	556	419	477	394	366
Misdemeanor	191	135	224	154	144
Transfer In	50	58	40	38	72
<b>Total Case Filings</b>	<b>46,958</b>	<b>34,022</b>	<b>32,404</b>	<b>26,788</b>	<b>31,308</b>
<b>Mainline Referrals</b>					
Countywide	23,381	21,868	23,327	22,708	22,884
Stockton	15,031	13,754	14,694	13,970	15,150
Lodi	2,414	2,532	2,687	2,498	2,286
Manteca/Ripon/Escalon/Tracy	5,936	5,582	5,946	6,240	5,448
<b>Mainline Investigations</b>					
Investigations Opened	2,098	2,131	2,257	2,271	2,398
Investigations Tasks	3,572	4,023	7,226	7,682	7,864
Subpoenas Served	4,610	5,067	6,358	5,985	6,583

\*Traffic data will no longer be tracked.

# 2020202000—DA-Real Estate Fraud Prosecution

## Law & Justice

Ronald J. Freitas, District Attorney  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$485,895	\$597,679	\$597,679	\$597,679	\$0
Centrally-Budgeted Expenses	20,837	2,346	59,383	59,383	57,037
Total Appropriations	\$506,732	\$600,025	\$657,062	\$657,062	\$57,037
<b>Earned Revenues By Source</b>					
Operating Transfers In	\$506,732	\$600,025	\$657,062	\$657,062	\$57,037
Total Revenues	\$506,732	\$600,025	\$657,062	\$657,062	\$57,037
Net County Cost	\$0	\$0	\$0	\$0	\$0

## Purpose

California Government Code Section 27388 authorizes counties to impose a recordation fee on certain real estate documents. The District Attorney's Office Real Estate Fraud Prosecution Fund receives an \$8 recording fee per eligible document. These funds can only be used for programs which enhance the capacity of local district attorneys and law enforcement to deter, investigate, and prosecute crimes involving real estate fraud.

## Major Budget Changes

### Centrally-Budgeted Expenses

- \$57,052 Cost Allocation Plan adjustment.

### Operating Transfers In

- \$57,037 Increase in reimbursement from Real Estate Fraud Prosecution Fund.

## Program Discussion

The 2023-2024 recommended budget for the District Attorney's Office Real Estate Fraud Prosecution totals \$657,062, which is an increase of \$57,037 from the 2022-2023 adjusted budget.

Recommended funding in the Real Estate Fraud Prosecution budget for 2023-2024 will be used to reimburse the District Attorney (DA) main budget and Consumer Fraud Proposition 64 budget for a Deputy DA, two DA Investigators, one part-time DA Investigator, and 20% of a Legal Technician.

The budget also includes fleet services expenses and funding for expert witnesses, such as forensic accountants and other experts who specialize in real estate transactions, interpreters, transcribers, and outreach.

### Real Estate Fraud Prosecution Unit

The Real Estate Fraud Prosecution Unit within the DA's Office is dedicated to the investigation and prosecution of real estate-related crimes. Real estate crimes may involve fraud related to home equity, mortgage, rental, grand theft, securities, forgery, foreclosure, loan, and any other types of fraud that steal a homeowner's interest with a single forged signature. Unless they promptly alert the authorities, unsuspecting victims can lose their life savings or homes. The perpetrators of these crimes prey upon an especially vulnerable population, which includes the poor, homeless, and other diverse communities.

When the Unit receives a consumer complaint involving real estate fraud, a Deputy DA reviews the complaint and determines if a criminal investigation will be initiated. A criminal investigator from the DA's Office will then be assigned to investigate the alleged criminal act(s).

Two investigators are assigned to the Unit to ensure a thorough investigation of all real estate fraud cases. After the completion of an investigation, the Deputy DA will review the facts of the case and determine whether to file criminal charges against an individual or business. If charges are filed, the DA's Office will represent the People of California throughout the completion of the court case. The case may include charges such as the recording of forged or false deeds and other instruments, grand theft, forgery, securities fraud, and mortgage foreclosure consultant scams.

# 2020202000—DA-Real Estate Fraud Prosecution

## Law & Justice

The Unit, when appropriate, may refer a complaint to another department or agency that may be of assistance to the complainant and works closely with the DA’s Consumer Protection Unit, Family Justice Center, and other State and Federal agencies.

When the criminal act(s) result in an actual loss to the victim, the Unit is committed to obtaining restitution orders on behalf of the victim. However, if the defendant does not have the means to pay restitution to the victim, the victim is informed that if the fraud is committed by a real estate licensee, they may seek compensation from the Bureau of Real Estate’s Consumer Recovery Fund or pursue civil remedies.

For 2023-2024, the Unit will conduct outreach in the community and develop a media campaign to educate citizens on the dangers of real estate fraud and the proper location to file complaints. Further, contact will be made with local mortgage companies, property management firms, and lenders to assist in investigating as many potential acts of fraud as possible.

### Fund Balance

The Real Estate Fraud Prosecution General Fund Special Account (#12128) is the operating fund for Real Estate Fraud activities. Fund balance as of March 31, 2023, was \$2,092,737.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Real Estate Fraud</b>					
<i>Prosecution Cases</i>	2*	1	2	1	2
<i>Investigations</i>	37	21	33	26	29
<b>Mortgage Fraud</b>					
<i>Prosecution Cases</i>	1	1	1	1	1
<i>Investigations</i>	1	3	2	2	2
<i>*Restated</i>					

# 2020204000—DA-Family Justice Center

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$237,306	\$495,800	\$234,622	\$234,622	(\$261,178)
Services & Supplies	223,873	737,305	427,599	427,599	(309,706)
Centrally-Budgeted Expenses	(15,595)	27,751	414,894	414,894	387,143
Capital Expenditures	44,122	15,000	0	0	(15,000)
Total Expenditures	\$489,706	\$1,275,856	\$1,077,115	\$1,077,115	(\$198,741)
Expenditure Reimbursements	(2,000)	0	0	0	0
Total Appropriations	\$487,706	\$1,275,856	\$1,077,115	\$1,077,115	(\$198,741)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$617,813	\$1,275,856	\$977,115	\$977,115	(\$298,741)
Miscellaneous Revenues	0	0	100,000	100,000	100,000
Total Revenues	\$617,813	\$1,275,856	\$1,077,115	\$1,077,115	(\$198,741)
<b>Net County Cost</b>	(\$130,107)	\$0	\$0	\$0	\$0
<b>Staffing</b>					
Allocated Positions	5.0	5.0	2.0	2.0	(3.0)
Temporary (Full-Time Equivalent)	1.5	1.5	0.0	0.0	(1.5)
Total Staffing	6.5	6.5	2.0	2.0	(4.5)

## Purpose

The San Joaquin County Family Justice Center's (FJC) purpose is to provide a collaborative model of service delivery that brings together a range of resources and support services under one roof in order to better serve victims of domestic violence, human trafficking, sexual assault, elder abuse, child abuse, and stalking. The goal of the FJC is to provide comprehensive and coordinated support to individuals and families affected by abuse, by helping them feel safe and supported as they navigate the process of seeking help and rebuilding their lives.

## Major Budget Changes

### Salaries & Employee Benefits

- \$7,914 Salary and benefits adjustment.
- (\$198,997) Delete one Victim Witness Advocate I-II and two Senior Office Assistants.
- (\$70,095) Decrease in extra-help.

### Services & Supplies

- (\$110,553) Decrease in administrative charges.
- (\$83,042) Decrease in small tools, instruments, and furniture costs.
- (\$54,016) Decrease in office supplies and printing costs.
- (\$41,000) Decrease in transportation and travel costs.
- (\$37,270) Decrease in educational materials costs.

# 2020204000—DA-Family Justice Center

## Law & Justice

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### Centrally-Budgeted Expenses

- \$383,911 Cost Allocation Plan adjustment.

### Revenues

- \$429,770 Increase in Federal grant funding.
- \$100,000 Increase in miscellaneous revenues due to new Kaiser Foundation grant.
- (\$728,511) Decrease in State grant funding.

## Program Discussion

The 2023-2024 recommended FJC budget totals \$1,077,115, which is a decrease of \$198,741 from the 2022-2023 adjusted budget.

Funding is primarily comprised of the following State and Federal grant funds for 2023-2024:

- **\$374,364** – California Office of Emergency Services (CalOES) County Victim Services (XC) Program.
- **\$172,981** – CalOES Family Justice Center (FJ).
- **\$100,000** – Kaiser Foundation Hospital for the Community Benefit Programs at the East Bay Community Foundation grant.
- **\$429,000** – Improving Criminal Justice Response grant.

The CalOES XC Program grant award of \$374,364 supports the immediate needs of food, shelter, clothing, and support for victims and families seeking services at the FJC. The XC Program grant also supports one full-time Victim Witness Advocate and a Senior Office Assistant.

The CalOES FJ grant award in the amount of \$345,961 covers the period from April 1, 2022 through March 31, 2024. During 2023-2024, \$172,981 will support the Wellness & HOPE Program for adult victims of domestic violence, child abuse, sexual assault, elder abuse, and human trafficking. Program activities include professional therapy sessions, medical and nutritional services, substance resources, and yoga and meditation classes.

The Kaiser Foundation Hospital for the Community Benefit Programs at the East Bay Community Foundation Grant award of \$100,000 supports the Adverse Childhood Experiences (ACEs) awareness and screening program. Services provided include mental health counseling for children and families who have experienced abuse and trauma.

The Improving Criminal Justice Response grant in the amount of \$429,770, supports victim services for victims of domestic violence, dating violence, sexual assault, and stalking, including strengthening assistance to such victims in immigration matters.

### One-Stop Approach

The one-stop approach of the FJC allows a victim seeking help to meet with the partner(s) of their choosing.

Onsite Partners include:

- District Attorney's Victim Witness Division
- District Attorney's Bureau of Investigation
- District Attorney Prosecutors
- Stockton Police Department
- San Joaquin County Office of Education
- Child Abuse Prevention Council (CAPC)
- PREVAIL (formerly Women's Center Youth & Family Services)
- Department of Child Support Services
- Community Medical Centers

Off-site partners include:

- Chest of HOPE
- Human Services Agency-Financial Aid and Adult Protective Services
- WorkNet

In addition, victims can obtain information on shelters, transitional housing, restraining orders, transportation, criminal justice system information, and more.

By bringing these resources together in one location, the FJC provides a streamlined and efficient way for individuals and families to access the help and support they need. The FJC can also serve as a hub for community outreach and education efforts while raising awareness of domestic violence and human trafficking.

In 2022-2023, the FJC continued the Wellness & HOPE Program focusing on financial, physical, emotional, and generational wellness. Services include VOICES Chat (a survivor support group), art therapy sessions, and Cooking Up Hope (a cooking demo followed by providing the families with groceries to recreate the recipe at home). The FJC also provides continued prevention education on domestic violence and human trafficking.

# 2020204000—DA-Family Justice Center

## Law & Justice

The FJC provided approximately 82 emergency food bags for families, 2,575 clothing/personal hygiene items for victims and their children, and transportation options for 427 people seeking services at the FJC. In addition, on-site child care was provided to 279 children.

During 2022-2023, the FJC continued collaboration with partners from the San Joaquin County Office of Education’s Come Back Kids (CBK) program. The FJC celebrated the achievement of a 36-year-old domestic violence survivor who participated in the CBK program and earned a high school diploma.

Throughout 2022-2023 the FJC personnel continuously remained on-site to serve the community and expanded

services joining with WorkNet to assist victims and survivors on securing employment. The FJC also added the Parent Café, a positive parenting skills class hosted by CAPC to assist in building parenting skills and a supportive environment.

Following challenges of the COVID-19 pandemic, the FJC resumed the Domestic Violence Task Force and continued to participate in the Countywide Human Trafficking Taskforce, including leading the Education and Outreach Committee.

October 2023 will mark the five-year anniversary of the opening of the current location of the San Joaquin County FJC at 222 E. Weber Avenue in Stockton.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
New/Continuing FJC Cases	3,815	3,492	2,766	3,049	3,319
Number of New Adults Served	2,870	2,820	1,767	2,400	2,320
Number of New Children Served	156	291	40	305	235
Number of Referrals Outside of FJC	445	552	539	607	650

# 2020205000—DA-Victim Assistance Center

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$787,997	\$911,175	\$985,906	\$985,906	\$74,731
Services & Supplies	20,143	43,815	38,024	38,024	(5,791)
Centrally-Budgeted Expenses	24,582	24,541	63,739	63,739	39,198
Total Expenditures	\$832,722	\$979,531	\$1,087,669	\$1,087,669	\$108,138
Expenditure Reimbursements	(179,515)	(180,072)	(288,210)	(288,210)	(108,138)
Total Appropriations	\$653,207	\$799,459	\$799,459	\$799,459	\$0
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$585,054	\$799,459	\$799,459	\$799,459	\$0
Total Revenues	\$585,054	\$799,459	\$799,459	\$799,459	\$0
<b>Net County Cost</b>	\$68,153	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	10.0	10.0	10.0	10.0	0.0

## Purpose

The Victim Assistance Center provides claims verification services for the California Victim Compensation Board (CalVCB). The Center provides local verification of claims to ensure timely issuance of payments to victims in San Joaquin County.

Claims verification services are provided through a Joint Powers Agreement with the CalVCB. Through this agreement, CalVCB funding assists 18 counties, including San Joaquin County. CalVCB reimburses crime-related expenses not reimbursed by other sources in order to help reduce the impact of crime on victims' lives.

Covered expenses include funeral/burial, outpatient mental health or counseling, wage or income loss, support loss, medically necessary home/vehicle modifications, home security installation, relocation, crime-scene cleanup, job retraining, veterinarian fees for service dogs, and roundtrip mileage reimbursement for doctor appointments.

These expenses are funded by Federal grants and restitution paid by criminal offenders through fines, orders, and penalty assessments.

## Major Budget Changes

### Salaries & Employee Benefits

- \$74,731 Salary and benefits adjustments.

### Services & Supplies

- (\$5,029) Decrease in communication costs.

### Centrally-Budgeted Expenses

- \$35,774 Cost Allocation Plan adjustment.

### Expenditure Reimbursements

- \$108,138 Increase in reimbursement from District Attorney's main budget (#2020200000).



# 2020205000—DA-Victim Assistance Center

## Law & Justice

### Program Discussion

The 2023-2024 recommended budget for the Victim Assistance Center totals \$1,087,669, which is an increase of \$108,138 from the 2022-2023 adjusted budget.

Staffing consists of a Victim Claims Supervisor, eight Victim Claims Specialists I-II, and a Senior Office Assistant. The budget also provides funding for 10% of the Program Manager position allocated to the Victim/Witness Program budget (#2020273000). The three-year agreement with the CalVCB ends June 30, 2024. The Department intends to apply for a grant renewal prior to the end of 2022-2023.

Workload Data					
	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021	2021-2022		
Applications Processed	2,806	2,548	1,984	1,968	1,968
Bills Processed	3,986	3,224	2,493	2,304	2,304
Benefits Secured for San Joaquin County Victims	\$1,692,599	\$1,417,910	\$1,173,808	\$1,285,978	\$1,285,978

# 2020206000—DA-Consumer Fraud Proposition 64

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$3,007,149	\$3,347,177	\$1,306,647	\$1,306,647	(\$2,040,530)
Services & Supplies	399,424	169,662	143,793	143,793	(25,869)
Centrally-Budgeted Expenses	69,057	69,047	91,031	91,031	21,984
Total Expenditures	\$3,475,630	\$3,585,886	\$1,541,471	\$1,541,471	(\$2,044,415)
Expenditure Reimbursements	(15,000)	0	0	0	0
Total Appropriations	\$3,460,630	\$3,585,886	\$1,541,471	\$1,541,471	(\$2,044,415)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$47,393	\$57,500	\$100,000	\$100,000	\$42,500
Operating Transfers In	3,441,140	3,528,956	1,441,471	1,441,471	(2,087,485)
Total Revenues	\$3,488,533	\$3,586,456	\$1,541,471	\$1,541,471	(\$2,044,985)
<b>Net County Cost</b>	(\$27,903)	(\$570)	\$0	\$0	\$570
<b>Allocated Positions</b>	19.0	19.0	5.0	5.0	(14.0)

## Purpose

The District Attorney (DA) Consumer Fraud Proposition 64 budget (#2020206000) was established to account for civil penalties received under the Business and Professions Code from those who participate in unfair competition. Penalties are placed in the Consumer Fraud and Environmental Code Enforcement General Fund Special Accounts to be used by the DA for enforcement of consumer protection laws. Limited case-specific funding is also received from the Craig Thompson Environmental Protection Prosecution (CTEPP) Fund, to reimburse costs for investigation and prosecution of environmental violations by large companies throughout the State of California, DA-Environmental Protection Unit (EPU) (#2020207000).

This narrative combines \$1,437,519 budgeted for Consumer Fraud Proposition-64 (#2020206000) and \$103,952 budgeted from Environmental Protection Unit (#2020207000).

## Major Budget Changes

### Salaries & Employee Benefits

- \$68,283 Salary and benefits adjustments.
- (\$2,108,813) Delete three Paralegals I-II, two Legal Technicians I-II, four Deputy District Attorneys I-IV, two DA Investigative Assistants I-II, one DA Investigator I-II, one Senior Office Assistant, and one Chief Deputy District Attorney.

### Services & Supplies

- \$45,000 Increase in environmental prosecution expenses.
- (\$55,091) Decrease in transportation and travel costs.
- (\$9,753) Decrease in communications costs.

### Centrally-Budgeted Expenses

- \$12,478 Increase in Workers' Compensation and Casualty insurance costs.
- \$7,543 Cost Allocation Plan adjustment.

# 2020206000—DA-Consumer Fraud Proposition 64

## Law & Justice

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### Revenues

- \$42,500 Increase in State funding for environmental prosecution.

### Operating Transfers In

- \$3,952 Increase in transfer from the DA EPU Fund.
- (\$2,091,437) Decrease in transfer from Consumer Fraud fund.

### Program Discussion

The 2023-2024 recommended Consumer Fraud Proposition 64 budget totals \$1,541,471, which is a decrease of \$2,044,415 from the 2022-2023 adjusted budget.

The budget provides funding to investigate and enforce consumer protection laws and prosecute environmental violations by large companies.

Despite the COVID-19 pandemic, 2022-2023 remained busy for the units within Consumer Fraud/Proposition 64 budgets. Investigations and filings of environmental prosecutions increased from 275 in 2021-2022 to an estimated 430 during 2022-2023. Investigations and filings of environmental cases remained active during this time, for both local and Statewide matters. The settlement amount of local EPU cases for 2022-2023 look to surpass the amount from 2021-2022.

### Illegal Dumping

In consumer fraud, referrals pertaining to matters of local interest saw a significant increase in cases filed and matters of Statewide interest. The DA's Office spent numerous hours collaborating with other governmental partners to tackle illegal dumping. Illegal dumping harms the environment and

quality of life for the residents and businesses of San Joaquin County.

Collaboration with law enforcement and other County and city agencies is necessary not only to apprehend those who are criminally responsible for this conduct, but also to educate the community as to legal options for disposing of waste. The DA's Office continues to participate in the Illegal Dumping Task Force and partners with County agencies to develop and implement strategies for enforcement of illegal dumping laws, eradication of discarded waste, and education concerning alternatives to illegal dumping activity.

### Fund Balance

#### Consumer Fraud & Environmental Code Enforcement Funds

Costs in this budget are reimbursed primarily from the Consumer Fraud General Fund Special Account (#12129) and the Environmental Code Enforcement General Fund Special Account (#12130). Annual revenues vary depending on civil penalties and settlements received. As of March 31, 2023, the Consumer Fraud Fund had a balance of \$1,359,497. As of March 31, 2023, the Environmental Code Enforcement Fund had a balance of \$2,939,819. A total of \$1,441,471 is designated from these funds for use in the 2023-2024 recommended budget.

#### DA-Environmental Protection Unit (EPU) Investigation/Prosecution Fund

The DA-EPU Investigation/Prosecution General Fund Special Account (#12131) is also used to supplement this budget for case-specific investigations and prosecution-related costs. Annual revenues vary depending on the number and types of cases investigated and prosecuted. The fund balance as of March 31, 2023, was \$698,397. No fund balance is designated for use in the 2023-2024 recommended budget.

# 2020206000—DA-Consumer Fraud Proposition 64

## Law & Justice

### Workload Data

	Actual			Act./Est.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Local Civil EPU Pre-file/Investigation	15	25	13	10	10
Local Civil EPU Filed	3	10	12	8	8
Local Civil EPU Collections	\$96,125	\$130,469	\$121,333	\$95,000	\$75,000
State Civil EPU Pre-file/Investigation*	68	80	85	75	75
State Civil EPU Filed*	2	7	6	5	5
State Civil EPU Settled*	N/A	7	6	5	5
State EPU Collections*	\$886,646	\$1,055,082	\$800,000	\$1,700,000	\$850,000
Consumer Fraud Referrals	200	44	50	144	90
Local Civil Pre-file/Invest. Con Fraud	60	78	60	50	50
Local Civil Consumer Fraud Filed	5	6	19	10	10
Local Consumer Collections	\$6,300	\$46,160	\$74,450	\$45,000	\$30,000
State Civil Pre-file/Invest. Con. Fraud*	3	10	12	8	12
State Civil Consumer Fraud Filings*	N/A	2	0	1	1
State Civil Consumer Fraud Settled*	N/A	2	1	1	1
State Consumer Collections*	\$0	\$337,095	\$100,000	\$100,000	\$200,000
Criminal Filings – Prop. 64 Cons. Fraud	590	163	275	430	300
ID Theft Filings**					
<i>Closed Felony ID Theft Cases</i>	65	78	N/A	N/A	N/A
<i>Victims of Felony ID Theft</i>	475	509	N/A	N/A	N/A

\*The Consumer Fraud Unit saw mixed results with increases for cases involving collaborations with other DA offices in California, but decreases in local referrals and investigations. Not fully reflected in the Workload Data chart are the hours spent working on two specific issues of local importance: 1) Enforcement of State and County restrictions relating to COVID-19 and illegal dumping; 2) Enforcement of COVID-19 regulations proved to be a major challenge, requiring frequent collaboration and conversations with partner government agencies, and the education of the public and local businesses. Notwithstanding the many hours of work in this area, fortunately the legal response required by this Unit has been minimal.

\*\*ID Theft data moved from this Unit and incorporated into DA's mainline general program narrative (2020200000). No stand-alone ID Theft workload stats will be reported after 2020-2021.

Proposition 64-related referrals came from following agencies:

Alcoholic Beverage and Control  
 Board of Equalization  
 Bureau of Automotive Repair  
 California Department of:  
     Fish and Wildlife  
     Forestry and Fire Protection  
     Motor Vehicles  
     Toxic Substances Control  
 California Environmental Protection Agency  
 California State Bar  
 California Structural Pest Control Board  
 Central Valley Regional Water Quality Control Board  
 City and County Municipalities  
 City and County Public Works Departments  
 Contractors State License Board

Department of Consumer Affairs  
 Department of Forestry and Fire  
 Department of Veteran Affairs  
 Employment Development Department  
 Local and County Fire Departments  
 San Joaquin County:  
     Agricultural Commissioner's Office  
     Community Development Department  
     Environmental Health Department  
     Metro Narcotics Task Force  
     Mosquito and Vector Control District  
     Parks and Recreation Department  
 San Joaquin Valley Air Pollution Control District  
 United States Coast Guard  
 United States Department of Agriculture

# 2020209000—DA-Child Abduction Unit

## Law & Justice

Ronald J. Freitas, District Attorney  
[www.sjgov.org/department/da](http://www.sjgov.org/department/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$448,588	\$481,130	\$484,697	\$484,697	\$3,567
Services & Supplies	231,129	241,118	59,439	59,439	(181,679)
Centrally-Budgeted Expenses	12,876	11,451	13,062	13,062	1,611
Total Expenditures	\$692,593	\$733,699	\$557,198	\$557,198	(\$176,501)
Expenditure Reimbursements	15,041	(18,041)	(120,977)	(120,977)	(102,936)
Total Appropriations	\$707,634	\$715,658	\$436,221	\$436,221	(\$279,437)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$788,887	\$713,658	\$436,221	\$436,221	(\$277,437)
Miscellaneous Revenues	0	2,000	0	0	(2,000)
Total Revenues	\$788,887	\$715,658	\$436,221	\$436,221	(\$279,437)
Net County Cost	(\$81,253)	\$0	\$0	\$0	\$0
Allocated Positions	3.0	3.0	3.0	3.0	0.0

## Purpose

The District Attorney (DA) is mandated by the State under the Family Code, Penal Code and Welfare and Institutions Code sections to enforce custody and visitation decrees, locate and return children unlawfully taken by a parent, proceed with civil court action, and guarantee appearance of offenders in court. The Uniform Child Custody Jurisdiction and Enforcement Act requires staff to locate children who are unlawfully detained in San Joaquin County and return them to courts in other jurisdictions.

## Major Budget Changes

### Salaries & Employee Benefits

- \$3,567 Salary and benefits adjustments.

### Services & Supplies

- (\$138,568) Decrease in labor costs.
- (\$30,128) Decrease in administrative costs.
- (\$6,076) Decrease in software and licenses.

### Expenditure Reimbursements

- \$102,936 Increase in cost reimbursements from the DA Mainline budget (#2020200000).

### Revenues

- (\$277,437) Decrease in reimbursement for State-mandated functions.

## Program Discussion

The 2023-2024 recommended Child Abduction Unit budget totals \$557,198, which is a decrease of \$176,501 from the 2022-2023 adjusted budget.

In addition to California and other U.S. territories, the Child Abduction Unit uses the Hague Convention in order to process a child's return from other countries. The Hague Convention was originally drafted in 1980 to ensure the prompt return of children abducted from their country of habitual residence or wrongfully retained in a signatory state, not their country of habitual residence.

As of 2023, 91 countries are partners in the treaty. Hague cases typically range from assistance with locating and serving court documents to a parent whose location is

# 2020209000—DA-Child Abduction Unit

## Law & Justice

unknown, violations of family court orders, and parental and non-parental abductions.

During the year, the Child Abduction Team (CAT) received 56 cases with the majority of those cases being resolved. Of the 56 cases, the DA’s Office assisted in the recovery/return

of 52 children, 16 of which were out-of-state recoveries from Washington, Georgia, Texas, Michigan, Tennessee, Nevada, and Arizona. Additionally, one child was recovered from outside of the United States. As of March 1, 2023, the CAT had two Hague cases under investigation.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Child Abduction Cases	36	42	42	52	50
Child Visitation Cases	34	20	20	24	20
Notification/Good Cause Cases	21	12	12	12	12
Recovered Children	43	57	57	40	45

# 2020210000—DA-Narcotics Enforcement

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$15,219	\$31,965	\$13,000	\$13,000	(\$18,965)
Centrally-Budgeted Expenses	(24,965)	(27,288)	39,038	39,038	66,326
Operating Transfers Out	100,000	100,000	75,950	75,950	(24,050)
Total Appropriations	\$90,254	\$104,677	\$127,988	\$127,988	\$23,311
<b>Earned Revenues By Source</b>					
Interest/Rents	\$1,313	\$2,000	\$4,000	\$4,000	\$2,000
Miscellaneous Revenues	319,892	102,677	123,988	123,988	21,311
Total Revenues	\$321,205	\$104,677	\$127,988	\$127,988	\$23,311
<b>Net County Cost</b>	(\$230,951)	\$0	\$0	\$0	\$0

## Purpose

The District Attorney's (DA) Asset Forfeiture program provides services to San Joaquin County law enforcement agencies, State, Federal, and Tribal agencies, the Bureau of Prisons, and Transportation law enforcement agencies concerning violations of Health and Safety Code #11488.5(a)(1). The DA receives and holds assets, processes the cases through the appropriate legal procedures, liquidates and disburses declared funds back to the agencies, and reserves 10% in the DA's special revenue fund #20034 and 9.75% in trust fund #81580-DA Gang & Drug Prevention. This unit supports partial reimbursement for one Deputy District Attorney in the DA Mainline budget (#2020200000).

## Major Budget Changes

### Services & Supplies

- (\$7,500) Decrease in publications and legal notices.
- (\$6,465) Decrease in subscriptions and periodicals.
- (\$5,000) Decrease in travel costs.

### Centrally-Budgeted Expenses

- \$66,326 Cost Allocation Plan adjustment.

### Operating Transfers Out

- (\$24,050) Decrease in operating transfer to DA's main budget (#2020200000).

## Program Discussion

The 2023-2024 recommended budget for Narcotics Enforcement totals \$127,988, which is an increase of \$23,311 from the 2022-2023 adjusted budget.

## Fund Balance

### DA Narcotics Enforcement Fund

As of March 31, 2023, the DA Narcotics Enforcement Special Revenue Fund (#20034) had a balance of \$590,065. The 2023-2024 budget includes a transfer of \$75,950 to the DA's main budget to support one Deputy District Attorney. Due to a pending settlement, revenue is projected at approximately \$127,988 including interest earnings of \$5,000.

# 2020212000—DA-Auto Insurance Fraud Prosecution

## Law & Justice

Ronald J. Freitas, District Attorney  
[www.sigov.org/department/da](http://www.sigov.org/department/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$302,558	\$279,374	\$300,947	\$300,947	\$21,573
Centrally-Budgeted Expenses	1,481	464	600	600	136
Total Appropriations	\$304,039	\$279,838	\$301,547	\$301,547	\$21,709
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$0	\$279,838	\$301,547	\$301,547	\$21,709
Operating Transfers In	273,500	0	0	0	0
Total Revenues	\$273,500	\$279,838	\$301,547	\$301,547	\$21,709
<b>Net County Cost</b>	\$30,539	\$0	\$0	\$0	\$0

## Purpose

The Auto Insurance Fraud Prosecution program provides State funding for the District Attorney (DA) to investigate and prosecute automobile insurance fraud cases. Funds are provided through a special surcharge collected by the California Department of Insurance (CDI) Commission on automobile insurance policies. Funding levels are based on San Joaquin County's proportionate share of the State population and the proportionate share of automobile insurance suspected fraudulent claims submitted to the CDI Fraud Division.

## Major Budget Changes

### Services & Supplies

- \$13,588 Increase in motor pool charges.
- \$7,021 Increase in administrative charges.

### Revenues

- \$21,709 Increase in State revenue.

## Program Discussion

The 2023-2024 recommended budget for Auto Insurance Fraud Prosecution totals \$301,547 which is an increase of \$21,709 from the 2022-2023 adjusted budget.

The budget provides funding for approximately 52% of a Deputy DA I-IV, 32% of a DA Investigator I-II, 21% of a DA Investigative Assistant I-II, and 21% of a Paralegal I-II, all of which are allocated in the DA's main budget (#2020200000).

The Auto Insurance Fraud Prosecution program is committed to investigating and prosecuting all forms of auto insurance fraud. This form of theft affects residents within the County, resulting in higher insurance rates and creates a danger on the County's highways.

Auto insurance fraud is diverse in its forms. Policy inception fraud involves obtaining a policy after an accident, and misrepresenting the date of the collision. Criminals who stage accidents either with co-conspirators or unsuspecting victims put all drivers at risk of physical harm. Vehicles abandoned in rural areas and waterways and reported as stolen, add to blight and create environmental hazards. Furthermore, dishonest repair garages may provide incomplete or fraudulent auto repairs, seeking to make extra money by misrepresenting repairs.

The District Attorney (DA) seeks to vigorously prosecute these cases by using more aggressive outreach efforts and fostering close relationships with the CDI, local insurance agencies, and local law enforcement. These continued partnerships assist the DA's Office with complex investigations resulting in convictions.



# 2020212000—DA-Auto Insurance Fraud Prosecution

## Law & Justice

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Auto Insurance Fraud Cases</b>					
<i>Referrals</i>	50	13	12	10	12
<i>New Filings</i>	11	10	13	12	10
<i>Active Investigations</i>	20	37	37	35	35
<i>Convictions</i>	15	19	13	13	10
<i>Declined</i>	2	3	1	1	1
<i>Carryover Cases</i>	7	29	34	30	35
<b>Restitution Ordered</b>	\$13,998	\$42,112	\$8,091	\$11,066	\$10,000
<b>Restitution Collected</b>	\$16,348	\$59,721	\$25,975	\$31,399	\$10,000
<b>Outreach Sessions</b>	7	6	1	2	10

# 2020216000—DA-Workers' Compensation Insurance Fraud

## Law & Justice

Ronald J. Freitas, District Attorney

[www.sjgov.org/department/da](http://www.sjgov.org/department/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$429,380	\$545,281	\$525,463	\$525,463	(\$19,818)
Centrally-Budgeted Expenses	2,629	996	678	678	(318)
Total Appropriations	\$432,009	\$546,277	\$526,141	\$526,141	(\$20,136)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$0	\$546,277	\$526,141	\$526,141	(\$20,136)
Operating Transfers In	432,009	0	0	0	0
Total Revenues	\$432,009	\$546,277	\$526,141	\$526,141	(\$20,136)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

The Workers' Compensation Insurance Fraud Prosecution program allows the District Attorney (DA) to expand the investigation and prosecution of those who commit Workers' Compensation insurance fraud, including applicant fraud, premium fraud, medical provider fraud, and uninsured employer fraud.

Funds are provided through a special assessment collected by the State Insurance Commission on Workers' Compensation insurance policies. Funding levels are based on the number of workers and the County's proportion of suspected fraudulent Workers' Compensation claims reported.

## Major Budget Changes

### Services & Supplies

- \$10,564 Increase in witness fees.
- \$8,780 Increase in fleet services costs.
- (\$31,000) Decrease in community outreach and education.
- (\$5,567) Decrease in labor costs reimbursed to DA's main budget (#2020200000).

### Revenues

- (\$20,136) Decrease in CA Department of Insurance revenue for the prosecution of Workers' Compensation cases.

## Program Discussion

The 2023-2024 recommended budget totals \$526,141, which is a decrease of \$20,136 from the 2022-2023 adjusted budget. Program funding supports 50% of a Deputy DA, 100% of a DA Investigator, 15% of a DA Investigative Assistant, and 45% of a Paralegal, all allocated in the DA's main budget (#2020200000).

The San Joaquin County District Attorney's Office investigates and prosecutes all forms of Workers' Compensation insurance fraud committed by both employees and employers. Currently, claimant and premium fraud are the most common forms of Workers' Compensation fraud observed in San Joaquin County. Claimant fraud occurs when an employee misrepresents the nature of a claimed injury, to the detriment of the employer and insurance company. Premium fraud involves the employer misrepresenting payroll in an effort to reduce insurance premiums. These crimes result in increased insurance premiums for all employers, and are especially harmful to businesses which operate as required by law.

# 2020216000—DA-Workers' Compensation Insurance Fraud

## Law & Justice

Workers' Compensation fraud investigations and prosecutions involve massive quantities of evidence. The DA's Office has strong relationships with the California Department of Insurance, local law enforcement, and special investigation units which provide the opportunity to complete more thorough investigations.

To continue the awareness of Workers' Compensation fraud, the office will engage in an aggressive advertising and outreach campaign targeting large populations via billboards, print media, and social media, in English and Spanish, with plans to expand into other languages.

### Workload Data

	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021	2021-2022		
<b>Workers' Compensation Cases</b>					
<i>Referrals</i>	20	19	14	13	15
<i>New Filings</i>	2	1	4	4	6
<i>Active Investigations</i>	12	29	27	18	15
<i>Convictions</i>	3	1	1	1	3
<i>Declined</i>	10	5	9	9	9
<i>Carryover Cases</i>	7*	6*	28	26	25
<i>Restitution Ordered</i>	\$25,360	\$2,500	\$4,164	\$222,045	\$10,000
<i>Restitution Collected</i>	\$12,076	\$57,403	\$19,187	\$79,941	\$8,000
<i>Outreach via Social Media</i>	9	8	8	9	12
<i>*Filed only</i>					

# 2020217000—DA-Public Assistance Fraud Prosecution

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,606,927	\$3,233,389	\$3,695,610	\$3,695,610	\$462,221
Services & Supplies	295,992	318,000	550,863	550,863	232,863
Centrally-Budgeted Expenses	71,266	71,234	75,682	75,682	4,448
Total Expenditures	\$2,974,185	\$3,622,623	\$4,322,155	\$4,322,155	\$699,532
Expenditure Reimbursements	(2,913,932)	(3,622,623)	(4,322,155)	(4,322,155)	(699,532)
Total Appropriations	\$60,253	\$0	\$0	\$0	\$0
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$60,253	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	17.0	17.0	19.0	19.0	2.0

## Purpose

The Public Assistance Fraud Prosecution Unit, known as the IMPACT Unit, operates through a Memorandum of Understanding between the District Attorney (DA) and the Human Services Agency (HSA). This Unit investigates and prosecutes criminal welfare fraud, including Temporary Assistance for Needy Families, CalFresh (food stamps), and vendor fraud cases. Funding is primarily provided from Federal and State welfare administration funds received by HSA.

## Major Budget Changes

### Salaries & Employee Benefits

- \$132,267 Salary and benefits adjustments.
- \$329,954 Add two DA Investigator I-II positions.

### Services & Supplies

- \$167,398 Increase in law enforcement equipment costs.
- \$39,115 Increase in fleet services costs.
- \$16,458 Increase in administrative costs.
- \$11,336 Increase in small tools and instruments purchases.

### Centrally-Budgeted Expenses

- \$8,083 Increase in Workers' Compensation insurance costs.
- (\$7,385) Cost Allocation Plan adjustment.

### Expenditure Reimbursements

- \$659,511 Increase in reimbursement from HSA.
- \$40,021 Increase in reimbursement from DA's main budget (#2020200000).

## Program Discussion

The 2023-2024 recommended budget for the Public Assistance Fraud Prosecution Unit totals \$4,322,155, which is an increase of \$699,532 from the 2022-2023 adjusted budget.

Funding supports one DA Investigator III, two DA Legal Technicians I-II, four DA Investigative Assistants I-II, and 12 DA Investigators I-II. In 2023-2024, the Unit will continue to pursue the recovery of fraudulently-obtained public assistance benefits. Through fraud prevention, detection, and investigation, staff will ensure those who are truly eligible for public assistance receive their benefits.

As the COVID-19 pandemic wanes, (client/recipient) referrals have increased from HSA. Additionally, the Unit continues to receive Cash Assistance EBT trafficking

# 2020217000—DA-Public Assistance Fraud Prosecution

## Law & Justice

referrals and Out-of-State Electronic CalFresh Fraudulent applications. This type of fraud appears to be perpetuated by unknown subjects who are defrauding the system and stealing benefits from legitimate welfare recipients.

Due to the Unit's efforts, the DA's Office has identified and convicted four EBT theft subjects and is currently prosecuting four additional cases. Furthermore, the Unit has outstanding warrants on eight other subjects, and is actively investigating others. As of February 28, 2023, 19 arrests and bench warrants have been issued.

Since March 2023, the Unit has experienced a slight decrease of recovered public funds. This decrease reflects an estimated cost avoidance of \$938,519 for cash assistance, and \$603,000 for CalFresh according to the State Department of Social Services. Prior to benefit distribution, early fraud detection efforts resulted in a cost avoidance of \$369,274 for cash assistance, and projected \$337,200 for CalFresh in 2022-2023. Overall cost avoidance totals \$2,247,993, a decrease of \$603,333.

The Department anticipates cost avoidance savings of public funds to increase in 2023-2024 as a result of additional revenue made available to the Unit.

### Workload Data

		<del>Actual</del>		Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Referrals</b>					
<i>Convictions</i>	102	173	87	85	85
<i>Declined</i>	0	0	0	2	2
<b>DA Investigations</b>					
<i>Ongoing Fraud</i>	1,357	850	1,168	1,150	1,150
<i>Duplicate Warrants - Aid to Families         with Dependent Children</i>	4	7	1	6	6
<i>Arrest/Bench Warrants</i>	35	73	47	40	40
<i>Early Fraud Cases</i>	577	655	892	850	850

# 2020278250—DA-Criminal Restitution Program

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/department/da](http://www.sjgov.org/department/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$104,335	\$261,876	\$279,923	\$279,923	\$18,047
Services & Supplies	0	1,005	11,085	11,085	10,080
Centrally-Budgeted Expenses	6,670	3,811	5,662	5,662	1,851
Total Expenditures	\$111,005	\$266,692	\$296,670	\$296,670	\$29,978
Expenditure Reimbursements	(1,000)	(74,729)	(98,949)	(98,949)	(24,220)
Total Appropriations	\$110,005	\$191,963	\$197,721	\$197,721	\$5,758
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$121,330	\$191,963	\$197,721	\$197,721	\$5,758
Total Revenues	\$121,330	\$191,963	\$197,721	\$197,721	\$5,758
<b>Net County Cost</b>	(\$11,325)	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	3.0	3.0	3.0	3.0	0.0

## Purpose

The Criminal Restitution Program is funded by a grant from the California Victim Compensation Board (CalVCB). CalVCB is funded through restitution paid by criminal offenders through fines, orders, penalty assessments, and Federal grant funds. The purpose of the Criminal Restitution Program is to ensure the imposition of these restitution fines.

California law requires every offender convicted of a felony or misdemeanor in California to pay a restitution fine. The Program ensures the imposition of orders against criminal offenders in all cases involving an applicant who has filed a victim compensation claim.

If a victim of a violent crime has received financial assistance from CalVCB, the court shall order the offender to repay the Program via a restitution order to replenish the State Restitution Fund.

## Major Budget Changes

### Salaries & Employee Benefits

- \$18,047 Salary and benefits adjustments.

### Services & Supplies

- \$11,085 Increase in administrative costs.

### Expenditure Reimbursements

- \$24,220 Increase in reimbursement from the District Attorney's main budget (#20202000000).

### Revenues

- \$5,758 Increase in State revenue.

## Program Discussion

The 2023-2024 recommended Criminal Restitution Program budget totals \$296,670, which is an increase of \$29,978 from the 2022-2023 adjusted budget.

The CalVCB funding supports two full-time Paralegals I-II and one Senior Office Assistant under-filled by an Office Assistant. The current agreement with the CalVCB ends June 30, 2023 and is in the process of being renewed for another three-year term. If the Department is unsuccessful in renewing the grant, program expenditures will be reduced and staff moved to vacant positions or terminated.

Staff will work to ensure that restitution is imposed by the Court in all eligible cases, unless the court waives imposition for compelling and extraordinary reasons that are stated on the record.

2020278250—DA-Criminal Restitution Program

Law & Justice

Workload Data					
	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
Restitution Orders Reviewed	3,921	967	1,006	1,114	1,114
Amount of Restitution Ordered for Crime Victims or CalVCB	\$465,785	\$773,350	\$129,123	\$326,310	\$326,310

# 2020281000—DA-State-COPS

## Law & Justice

Ronald J. Freitas, *District Attorney*  
[www.sjgov.org/departments/da](http://www.sjgov.org/departments/da)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$248,407	\$249,364	\$249,399	\$249,399	\$35
<i>Centrally-Budgeted Expenses</i>	1,593	636	601	601	(35)
<i>Total Appropriations</i>	\$250,000	\$250,000	\$250,000	\$250,000	\$0
<b>Earned Revenues By Source</b>					
<i>Aid From Other Governments</i>	\$350,473	\$250,000	\$250,000	\$250,000	\$0
<i>Total Revenues</i>	\$350,473	\$250,000	\$250,000	\$250,000	\$0
<b>Net County Cost</b>	(\$100,473)	\$0	\$0	\$0	\$0

## Purpose

Since 1996, the State Citizens' Option for Public Safety (COPS) program has provided funding to local agencies for front-line law enforcement services, enhanced prosecution efforts, and jail operation/construction. Funding is provided from State Vehicle License Fees and allocated by formula to city and county law enforcement, the District Attorney's Office, and the County Jail. This narrative represents the program funding allocated by the State to the District Attorney.

## Program Discussion

The 2023-2024 recommended budget for the State Citizens' Option for Public Safety (COPS) program totals \$250,000. Funding will be used to underwrite the cost of a Deputy District Attorney allocated in the District Attorney's main budget (#2020200000) to prosecute felony cases.

## Fund Balance

### Supplemental Law Enforcement Services Special Revenue Fund

The Supplemental Law Enforcement Services Special Revenue Fund (#20052) receives funding for the State COPS programs (operated by the Sheriff and the District Attorney), as well as Juvenile Justice Crime Prevention Act activities (operated by Probation). The 2022-2023 beginning fund balance was \$3,875,207 with the DA's portion consisting of \$250,000. For 2023-2024, the DA's portion is projected to be \$250,000.



# DA-State Grant Programs

## Law & Justice

Ronald J. Freitas, District Attorney  
[www.sigov.org/departments/da](http://www.sigov.org/departments/da)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,644,812	\$1,962,917	\$2,074,912	\$2,074,912	\$111,995
Services & Supplies	758,336	802,340	635,428	635,428	(166,912)
Centrally-Budgeted Expenses	66,742	80,405	86,657	86,657	6,252
Total Expenditures	\$2,469,890	\$2,845,662	\$2,796,997	\$2,796,997	(\$48,665)
Expenditure Reimbursements	(175,130)	(246,532)	(234,892)	(234,892)	11,640
Total Appropriations	\$2,294,760	\$2,599,130	\$2,562,105	\$2,562,105	(\$37,025)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$2,172,172	\$2,061,904	\$2,048,032	\$2,048,032	(\$13,872)
Miscellaneous Revenues	0	0	261	261	261
Total Revenues	\$2,172,172	\$2,061,904	\$2,048,293	\$2,048,293	(\$13,611)
<b>Net County Cost</b>	\$122,588	\$537,226	\$513,812	\$513,812	(\$23,414)
<b>Allocated Positions</b>	19.0	19.0	19.0	19.0	0.0
Temporary (Full-Time Equivalent)	3.8	0.0	0.0	0.0	0.0
Total Staffing	22.8	19.0	19.0	19.0	0.0

## Purpose

The California Governor's Office of Emergency Services (Cal OES) and the State Local Law Enforcement Safety Account provide financial and technical assistance to agencies throughout the State, including various public safety and crime victim support grants. These agencies provide grants to the District Attorney's (DA's) Office for:

- 2020273000 Victim/Witness Program
- 2020278270 Unserved/Underserved Victim Advocacy and Outreach
- 2020278240 Rural Crime Prevention

All three grants are reported in this narrative.

## Major Budget Changes

- (\$68,333) Decrease in professional services for consultants.

### Salaries & Employee Benefits

- \$111,995 Salary and benefits adjustments.

- (\$32,101) Decrease in jury and witness expenses.

### Services & Supplies

- \$13,723 Increase in travel and training costs.
- \$7,470 Increase in fleet services costs.
- \$5,209 Increase in office supplies.
- (\$70,435) Decrease in administrative costs.

- (\$15,680) Decrease in labor charges from DA's main budget (#2020200000).

- (\$6,700) Decrease in furniture costs.

### Centrally-Budgeted Expenses

- \$5,118 Increase in Workers' Compensation and Casualty insurance costs.

# DA-State Grant Programs

## Law & Justice

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### Expenditure Reimbursements

- (\$11,640) Decrease in reimbursements from the Victim Assistance and Unserved/Underserved budgets.

### Revenues

- \$17,556 Increase in Proposition 172 funding.
- (\$31,428) Decrease in Cal OES funding.

## Program Discussion

The 2023-2024 recommended budget totals \$2,796,997, which is a decrease of \$48,665 from the 2022-2023 adjusted budget. Due to the impacts of COVID-19, Cal OES waived match requirements which decreased Net County Cost. Funding supports 80% of one Victim/Witness Program Manager, one Victim/Witness Advocate III, two Victim/Witness Advocate Supervisors, two Senior Office Assistants, and 13 Victim/Witness Advocates I-II.

### Victim/Witness Program

The Victim Witness Program provides support services to victims and witnesses of crimes. Services include responding to crime scenes with a mobile unit, crisis intervention and emergency assistance, information and referrals to other agencies, court support services, and assistance with preparing claims for assistance from the California Victim Compensation Fund. The Program also manages the witness room in the courthouse to ensure victims/witnesses are separated from the alleged assailants and their families. In 2022-2023, 1,463 victims/witnesses were assisted while 2,340 families received support.

To enhance the Program and bring public awareness of available services, announcements are released using the District Attorney's Office social media platforms during key observances, such as National Crime Victim Rights Week and the Victims of Violent Crime Candlelight Vigil. Additionally, the Program participates in local informational events to raise awareness and build relationships in the community. Training is also provided to law enforcement agencies and other community service providers. During 2022-2023, 23 presentations/outreach events were held throughout the County.

Due to Criminal Justice Reform, two Advocates are assigned to provide comprehensive services to victims in post-

conviction proceedings. Cases returning for possible resentencing under the felony murder rule, sex offender status change, or possible parole releases are handled by the advocates. These cases require locating and notifying victims/families to determine if and how they would like to participate in the criminal process. If victims agree to participate, assistance is provided with obtaining a restraining order, court accompaniment, meetings with attorneys, victim impact statements, court case updates, and orientation to the court process.

The 2023-2024 recommended budget totals \$2,301,815, which is a decrease of \$17,310 from the 2022-2023 adjusted budget.

### Unserved/Underserved Victim Advocacy & Outreach Program

This Program is incorporated with the DA's Victim/Witness Program and enhances the provision of culturally-appropriate victim services and training in the geographically-isolated regions of the County. This is a Statewide competitive grant intended to provide services to unserved and underserved populations.

Funding supports two Advocates that provide direct assistance to victims in the geographically-isolated areas of the County. Providing this assistance, reduces severity of the psychological trauma caused by the victimization and improves the willingness of the victim to cooperate in the criminal process. Advocates also provide training to law enforcement agencies in these communities and participate in outreach events to disseminate program information.

The 2023-2024 recommended budget totals \$225,182, which is a decrease of \$31,355 from the 2022-2023 adjusted budget.

### Rural Crime Prevention Program

The DA provides administrative oversight for the Rural Crime Task Force consisting of the members from the DA's Office, Sheriff, Agricultural Commissioner, and rural farm owners and operators. The mission of the task force is education, loss prevention, recovery of property, and prosecution of criminal activity in rural areas.

The 2023-2024 recommended budget totals \$270,000, with no change from the 2022-2023 adjusted budget.

# DA-State Grant Programs

## Law & Justice

### Workload Data

	<u>2019-2020</u>	<u>Actual</u> <u>2020-2021</u>	<u>2021-2022</u>	<u>Est./Act.</u> <u>2022-2023</u>	<u>Projected</u> <u>2023-2024</u>
<b>Victim/Witness Program</b>					
<i>New Victims Served</i>	6,521	5,768	5,980	4,860	4,860
<i>Continuing Victims Served</i>	8,286	9,379	10,458	6,892	6,892
<i>Victims Provided Crisis Intervention</i>	744	1,515	1,102	842	842
<i>Rural Crimes Prosecuted (Felony)</i>	16	16	16	16	40

# 2020300000—Child Support Services

## Law & Justice

Abraham Mendoza, Child Support Services Director

[www.sjgov.org/departments/dcsc](http://www.sjgov.org/departments/dcsc)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$15,032,648	\$18,946,932	\$20,524,787	\$20,524,787	\$1,577,855
Services & Supplies	2,423,507	2,261,735	2,391,015	2,391,015	129,280
Centrally-Budgeted Expenses	963,621	1,282,021	1,597,465	1,597,465	315,444
Capital Expenditures	0	59,000	0	0	(59,000)
Total Expenditures	\$18,419,776	\$22,549,688	\$24,513,267	\$24,513,267	\$1,963,579
Expenditure Reimbursements	(126,500)	0	0	0	0
Total Appropriations	\$18,293,276	\$22,549,688	\$24,513,267	\$24,513,267	\$1,963,579
<b>Earned Revenues By Source</b>					
Interest/Rents	\$2,693	\$5,000	\$7,500	\$7,500	\$2,500
Aid From Other Governments	18,157,090	22,511,918	24,466,967	24,466,967	1,955,049
Miscellaneous Revenues	56,289	0	0	0	0
Operating Transfers In	72,924	32,770	38,800	38,800	6,030
Total Revenues	\$18,288,996	\$22,549,688	\$24,513,267	\$24,513,267	\$1,963,579
<b>Net County Cost</b>	\$4,280	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	171.0	197.0	188.0	188.0	(9.0)
<b>Temporary (Full-Time Equivalent)</b>	0.5	0.5	0.6	0.6	0.1
<b>Total Staffing</b>	171.5	197.5	188.6	188.6	(8.9)

## Purpose

The Department of Child Support Services (DCSS) works with parents and caretakers to establish and adjust financial support orders for the benefit of their children. Additionally, the DCSS collects, disburses, and accounts for child support payments under the Title IV-D Child Support Enforcement Program. The Department provides services solely upon revenue sources from State and Federal grant funds.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Reduce Department vacancy rate	18.8% as of February 2023	12%	December 2023

# 2020300000—Child Support Services

## Law & Justice

Organizational Capacity/Technology Utilization			
Demonstrate Leadership Development	Current	Target	Deadline
<ul style="list-style-type: none"> <li>Develop and implement a leadership program for prospective and current leadership staff</li> </ul>	No formalized leadership program	Send leadership staff through a formalized leadership program	Completion Rate: 25% by Dec. 2023 25-50% by June 2024 50 -75% by Dec. 2024 75-100% by June 2025
Augment Digitization and Automation	Current	Target	Deadline
<ul style="list-style-type: none"> <li>Explore utilization of artificial intelligence (AI) to assist with customer service</li> </ul>	0 Applications	1 Application	March 2024
Economic Development			
Enhance COVID Recovery	Current	Target	Deadline
<ul style="list-style-type: none"> <li>Conduct targeted monthly webinars for case participants regarding employment resources and child support assistance available to them within San Joaquin County</li> </ul>	0 Webinars	1 Webinar (monthly)	July 2023
<ul style="list-style-type: none"> <li>Increase the Department's average performance ranking among Local Child Support Agencies throughout the State</li> </ul>	30	28	June 2025

### Organizational Capacity/Technology Utilization

#### Improve Recruitment & Retention Rates

The Department is taking proactive measures to recruit and retain staff through various initiatives. DCSS is participating in locally-sponsored job recruitment fairs and streamlining hiring processes to attract additional job candidates. In August 2022, the Department created new-hire and mid-point staff surveys, to obtain valuable feedback and recommendations from new staff. During 2022-2023, DCSS also revitalized the Employee of the Quarter program and included staff in the development of the Department's mission, vision, and values statements, to boost employee morale and build a more cohesive team.

#### Demonstrate Leadership Development

In August 2022, DCSS partnered with five Local Child Support Agencies (LCSAs) to commence development of a standardized leadership program for child support staff in the region. The goal is to foster development of staff in leadership positions within the Child Support program for succession

planning and professional growth. The first cohort is scheduled to graduate in December 2023. It is anticipated all Department leadership will complete the leadership program by June 2025.

#### Augment Digitization & Automation

To enhance the overall customer experience and provide more efficient services, in February 2023, DCSS began actively exploring and researching the benefits of artificial intelligence-powered customer support applications; specifically, real-time self-service and customer service through a chat feature, with automated instant replies or a live customer service representative.

### Economic Development

#### Enhance COVID Recovery

In December 2022, the Department formed an internal workgroup to develop webinars to inform program participants of services offered, as well as employment and job training resources available through partner agencies.

# 2020300000—Child Support Services

## Law & Justice

Webinars are currently being developed and will be held monthly, with the first webinar taking place in late spring of this year. The webinars may expand to include representatives from partner agencies in an effort to better meet the needs of customers.

For 2020-2021, the Department ranked 45 in performance among Local Child Support Agencies across California. Most recently for 2021-2022, the Department improved its ranking to 30. The goal is to further improve the ranking through identifying efficiencies, increasing staffing levels to assist our rising caseload, and continue community outreach efforts. These goals aim to increase child support services to families coming out of the COVID-19 pandemic.

### Major Budget Changes

#### Salaries & Employee Benefits

- \$2,255,781 Salary and benefits adjustments.
- (\$687,699) Delete nine Senior Office Assistants.
- \$9,773 Increase in extra-help costs.

#### Services & Supplies

- \$93,500 Increase in professional services, primarily due to a rise in legal processing service costs.
- \$45,919 Increase in facility lease costs.
- \$12,190 Increase in utilities and maintenance costs.
- \$10,000 Increase in security services costs.
- (\$40,500) Decrease in communications costs due to reduction in staff and fewer virtual private network (VPN) account requests.

#### Centrally-Budgeted Expenses

- \$134,772 Increase in Workers' Compensation insurance costs.
- \$111,937 Increase in data processing charges.
- \$75,255 Cost Allocation Plan adjustment.

#### Revenues

- \$1,290,332 Increase in Federal Child Support Enforcement Program funding.
- \$664,717 Increase in State Child Support funding.

### Program Discussion

The 2023-2024 recommended budget for the Department of Child Support Services (DCSS) totals \$24,513,267, which is an increase of \$1,963,579 from the 2022-2023 adjusted budget.

Due to overall caseload size, the Department is receiving additional Federal and State Child Support funding. However, with negotiated salary and benefits adjustments in 2023-2024, totaling \$2.3 million, the proposed budget includes the deletion of nine vacant Senior Office Assistant positions to offset the increase.

Proposed Positions for Deletion	
Position	Quantity
<b>Family Involvement Team</b>	
Senior Office Assistant	7
<b>Customer Contact Center</b>	
Senior Office Assistant	1
<b>Analytics and Compliance Team</b>	
Senior Office Assistant	1
<b>Total</b>	<b>9</b>

For 2023-2024, the Governor's proposed budget includes an additional \$35.8 million (\$12.2 million State General Fund and \$23.6 million Federal match) for underfunded Local Child Support Agencies (LCSAs) administrative costs. The State Department of Child Support Services (State DCSS) has determined the County would receive \$1.96 million of the supplemental funding based on its allocation methodology. The Department's 2023-2024 recommended budget includes the \$1.96 million in additional funding.

During summer 2019, DCSS relocated to 409 E. Market Street in downtown Stockton, where it occupies 59,457 square feet. The Department's former location (826 N. California Street in Stockton) was listed for sale in early 2020. A Purchase and Sales Agreement for the property was approved by the Board on December 13, 2022 (B-22-674), for \$2.25 million, and the sale is anticipated to close in May 2023. In the event there is a delay in the sale, the 2023-2024 recommended budget includes \$38,800 for six months of maintenance costs for the former location, funded by the Family Support Trust Fund (#81452). Should the sale not transpire, the Department will return to the Board of Supervisors midyear to request General Funds for the ongoing maintenance costs of the building. The extended costs are unallowable with child support grant funds.

DCSS, in partnership with WorkNet, operates a satellite location at 543 W. Grant Line Road in Tracy, making services more readily available to south County residents. Customers

# 2020300000—Child Support Services

## Law & Justice

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can conveniently make payments in the office using a kiosk that accepts cash, debit, and credit cards.

The Department added two in-house Civil Process Server positions in 2022-2023. By employing internal process servers, the Department is strengthening communication with program participants. With their knowledge in the Child Support Program, the Civil Process Servers are able to provide clear and concise information to participants. They can also offer a first-hand explanation of the legal documents being served. In 2023-2024, the Department aims to reduce its use of the contracted process server for cases where participants reside in the local area.

In May 2021, the State DCSS established the Debt Reduction Program (DRP), which replaced the former Compromise of Arrears Program (COAP). The DRP gives eligible parents with past-due child support balances (arrears) the opportunity to reduce the amount they owe to the government. However, it will not reduce unpaid child support owed directly to the person receiving support. The Program shifts the focus from collecting a percentage of total arrears owed to collecting based on a participant's ability to pay. Prior to processing a DRP application, staff considers whether the DRP is the best or only appropriate action on behalf of the parent ordered to pay support. In 2021-2022, the Department received 259 DRP applications, collected \$244,159 towards government-owed arrears, and forgave \$1,991,907 in government-owed debt.

In 2023-2024, DCSS will collaborate with approximately 80 local agencies for its eighth Annual Block Party, scheduled for July 2023. The DCSS Annual Block Party is a fun event for families to learn about community-based organizations and government resources that promote self-sufficiency and reduce childhood poverty. In 2022-2023, 609 backpacks were distributed to school-aged children in the community. The Department plans to raise the number of backpacks distributed to 700 in 2023-2024.

The Department held its second Annual San Joaquin County Holiday Giving event on December 17, 2022. Employees from various County departments contributed over 260 gifts to fulfill the wish lists of 52 children and young adults residing in the County.

In collaboration with the District Attorney's Office, DCSS offers its services at the Family Justice Center (FJC) to victims of domestic violence and human trafficking. The DCSS FJC caseload has steadily grown from 91 to 634 cases since the Center opened in 2018.

DCSS serves over 35,000 children. In Federal fiscal year 2022, DCSS collected \$63.1 million, where 89% of in-State distributions went directly to families. Reliable child support payments contribute to the stability of families, leading to less poverty, increased likelihood of children attending college, greater parental involvement, and a decreased use of public assistance programs.

## Fund Balance

### Child Support Services Fund

Child Support Services Special Revenue Fund (#20038) serves as the operating fund for Department expenditures. The Child Support Enforcement Special Revenue Fund (#20381) serves as the depository for State DCSS funding advances. Actual costs are reconciled monthly through the LCSA expenditure claim submitted to the State DCSS. Funds are then transferred from fund #20381 to fund #20038 to cover Department expenditures. Unspent funds received in fund #20381 are returned to the State DCSS each quarter. Any remaining fund balance in #20038 at the end of the fiscal year primarily exists due to unreconciled program expenses and unspent incentive funds. Unspent incentive funds serve as a reserve for unanticipated costs. For 2022-2023, the beginning fund balance in #20038 was \$72,159.

### Family Support Fund

The Family Support Trust Fund (#81452) is a dormant fund that was created to transfer funds to the County Human Services Agency and the State for Title IV-A assistance recoupment, and to forward monies to families that were collected above what was due to the County and State. As of March 31, 2023, the fund balance was \$61,572. The 2023-2024 recommended budget includes \$38,800 from the fund to cover six months of maintenance costs at the Department's former location, if needed.

## 2020300000—Child Support Services

### Law & Justice

	Workload Data			Est./Act. 2022-2023	Projected 2023-2024
	Actual				
	2019-2020	2020-2021	2021-2022		
Total Collections	\$72,303,548	\$67,572,682	\$63,095,915	\$64,357,834	\$65,001,412
Support Sent to Families	\$57,515,146	\$56,753,293	\$53,097,170	\$54,060,580	\$54,601,186
Average Number of Days From Monetary Order to First Payment	87	63	64	63	62
Customer Contact Center Calls Received	N/A*	40,464	44,555	46,344	46,500
Lobby Visitors	6,078	4,617	8,484	9,602	9,600
# of Homeless Customers Served	832	2,588	2,387	2,625	2,887
% of Families Receiving 75% or More of Mo. Child Support	49.63%	50.02%	45.29%	48.46%	48.94%
Public Outreach Events	60	72	121	180	185
*Data not collected.					



# 2020400000—Public Defender

## Law & Justice

Miriam Lyell, *Public Defender*

[www.sjgov.org/departments/pubdef](http://www.sjgov.org/departments/pubdef)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$16,860,823	\$18,739,259	\$20,809,851	\$20,809,851	\$2,070,592
Services & Supplies	485,835	1,938,907	2,411,817	2,411,817	472,910
Centrally-Budgeted Expenses	1,529,160	2,685,288	2,019,531	2,019,531	(665,757)
Total Expenditures	\$18,875,818	\$23,363,454	\$25,241,199	\$25,241,199	\$1,877,745
Expenditure Reimbursements	(774,065)	(741,390)	(773,996)	(773,996)	(32,606)
Total Appropriations	\$18,101,753	\$22,622,064	\$24,467,203	\$24,467,203	\$1,845,139
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$7,948,133	\$9,970,014	\$11,132,873	\$11,132,873	\$1,162,859
Charges For Services	708,868	573,008	573,008	573,008	0
Miscellaneous Revenues	1,240	2,000	2,000	2,000	0
Total Revenues	\$8,658,241	\$10,545,022	\$11,707,881	\$11,707,881	\$1,162,859
<b>Net County Cost</b>	\$9,443,512	\$12,077,042	\$12,759,322	\$12,759,322	\$682,280
<b>Allocated Positions</b>	92.0	96.0	97.0	97.0	1.0
<b>Temporary (Full-Time Equivalent)</b>	1.6	3.9	4.9	4.9	1.0
<b>Total Staffing</b>	93.6	99.9	101.9	101.9	2.0

## Purpose

The Public Defender provides constitutionally mandated indigent defense services in all criminal matters as is required by the U.S. Constitution. The San Joaquin County Public Defender's Office is dedicated to serving the diverse needs of the community and its justice system by furnishing clients whose cases have been entrusted to the Public Defender, with competent, effective, loyal, ethical, zealous, compassionate, and efficient advocacy.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Public Defender's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve the Public Defender's vacancy rate.	8% as of March 31, 2023	4%	January 2024
➤ Create a formal law clerk internship program to aid future recruitments.	Prior internships have been informal.	Create and implement a structured program for better recruitment and retention.	June 2024

# 2020400000—Public Defender

## Law & Justice

Demonstrate Leadership Development	Current	Target	Deadline
➤ Increase training opportunities for attorneys and investigators.	The Public Defender has limited funds to send staff to trainings necessary to become well-versed in applicable areas of law.	Increase the Public Defender's training budget and begin sending more attorneys and investigators to Statewide and national trainings in order to better develop staff.	July 2023
➤ Develop an officewide training program.	Most in-house training occurs within individual units and there is no structured training plan for the office as a whole.	Utilize the Statewide and national trainings to develop office experts in specific fields who can provide in-house training to staff and serve as subject-matter experts.	December 2023
Augment Digitization and Automation	Current	Target	Deadline
➤ Improve efficiency through the implementation of a new case management system with the ability to interface with the District Attorney's (DA) Case Management System (CMS).	The Public Defender's current case management system cannot interface with the DA's CMS.	Purchase, develop, and implement a new case management system that can interface with the DA's CMS.	July 2024
➤ Increase efficiency by transitioning to a paperless office.	The Public Defender's current CMS does not have the capability to support a completely paperless office.	Implement a new CMS and transition to a fully paperless office.	December 2024

### Major Budget Changes

- \$25,000 Increase in training costs.

#### Salaries & Employee Benefits

- \$1,905,429 Salary and benefits adjustment.
- \$126,088 Add a Social Worker Supervisor.
- \$102,948 Add a Senior Social Worker.
- (\$121,839) Delete a Social Worker III.
- \$57,966 Increase in extra-help.

#### Centrally-Budgeted Expenses

- \$333,818 Increase in Workers' Compensation and Casualty insurance costs.
- (\$1,032,980) Cost Allocation Plan adjustment.

#### Expenditure Reimbursements

- \$32,606 Increase in AB 109 funding.

#### Services & Supplies

- \$450,500 Increase in software costs for the purchase of Defender by Karpel.

#### Revenues

- \$1,168,478 Increase in Proposition 172 funding.

# 2020400000—Public Defender

## Law & Justice

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### Program Discussion

The 2023-2024 recommended budget for the Public Defender totals \$25,241,199, which is an increase of \$1,877,745 from the 2022-2023 adjusted budget.

#### Department of State Hospitals Felony Diversion Grant

In 2023-2024, the Public Defender's recommended budget includes Department of State Hospitals Felony Diversion Grant funding of \$1.2 million. Using these funds, the Public Defender has created a pre-trial diversion program for felony offenders found incompetent to stand trial.

In order to fulfill its duties under the grant, the Public Defender's budget includes a Clinical Social Worker, part-time Deputy Public Defender IV, and a part-time Accounting Technician II. The Clinical Social Worker will pre-screen potential clients, gather records, coordinate evaluations, placement, and treatment, assist clients with obtaining Social Security, and report any concerns to the attorney. The Deputy Public Defender IV appears in court with the clients, selects candidates for the program in collaboration with the District Attorney, litigates disputes over acceptance or termination in court, and works with program providers to ensure clients' needs are met. The Accounting Technician II handles all finances related to the grant and statistical data reporting requirements.

The goal of the grant program is to treat mental illness, as well as provide housing, substance abuse treatment, job training, and life skill classes for each of the clients. Increasing the clients' stability decreases the likelihood of recidivism and improves public safety. There are currently six individuals enrolled in the Felony Diversion Grant program, and the Public Defender expects to serve a total of 26 clients throughout the course of the grant. The Department of State Hospitals has scheduled the Felony Diversion Grant program to expire on June 30, 2025.

#### Increased Vertical Representation

The Public Defender continues to implement operational changes in the representation of individuals charged with serious felony offenses by increasing vertical representation, meaning one attorney handles each of these cases from the first arraignment through its conclusion. The American Bar Association recommends vertical representation in cases involving serious felony offenses, because it ensures continuity of representation. Vertical representation also has the potential for a positive fiscal impact by delivering mandated legal services in a more cost-effective manner. The Public Defender intends to expand the existing felony trial

team and split it into two separate teams (Main Line and Major Crimes) to increase vertical representation.

#### Social Media

To broaden public access to County services and relevant information, the Public Defender continues to develop an interactive web page, which will include:

- Links to provide explanations of various court processes, laws, and procedures.
- Links to information and applications regarding various restorative justice programs such as the Racial Justice Act, Penal Code (PC) 1473.7, and Youth Offender Parole.
- Information on significant changes in the law, such as the overhaul of the homicide liability through Senate Bill (SB) 1437 and overhaul of the lifetime sexual offender registration through SB 384.

The Public Defender has launched Facebook and Instagram pages to provide the community with useful information related to voting rights, changes to the law, upcoming community events, recent accomplishments, Constitutional rights, and the criminal justice system.

The expanded use of technology and social media improves community relations and maximizes Public Defender efficiency, while providing practical and helpful information.

#### Technology

The Public Defender remains committed to moving towards a paperless office. In 2022-2023, the Public Defender contracted with Axon Evidence Management Software. This helped reduce the cost of storage and increased efficiency by eliminating lengthy download times and providing automatic transcription services and video editing capabilities. The Public Defender is researching and hopes to implement a new case management program that would interface directly with Axon.

The Public Defender is also replacing outdated desktops with laptops. This will allow attorneys to access and update their files at all times and eliminate the redundancy of data entry into the case management system.

#### Microfiche Digitization

The Public Defender partnered with Princeton University and BMI Imaging to digitize over 2,000 rolls of microfilm. The digitized documents have simplified the process of identifying clients eligible for post-conviction relief by allowing staff to search through thousands of files in seconds.

# **2020400000—Public Defender**

## **Law & Justice**

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### **Uptrust Project**

The Public Defender continues to partner with Uptrust, an organization that provides automatic reminders to out-of-custody clients about upcoming court dates and other court-ordered obligations through a two-way, text messaging platform. The organization has provided 100 cellular phones to clients without one.

The Uptrust system helps in reducing the number of bench warrants according to the Pretrial Justice Institute. Bench warrants can lead to incarceration, destabilizing the individual, and increasing the risk factors for recidivism. By almost doubling the participants, text message reminders have decreased failure-to-appear rates to just 5% of participating non-custody clients. Reduction of failures to appear in court also results in cost savings to the court, law enforcement, and the jail. The Community Corrections Partnership continues to provide funding for the Uptrust Project.

### **Veterans Treatment Court (VTC)**

The Public Defender, along with its County partners, continues its work to divert veterans into alternatives to traditional prosecution or alternatives to traditional sentencing. The mission of the VTC is to identify eligible veterans and place them into treatment and monthly court supervision. Twice a month, a Deputy Public Defender provides legal advice and encouragement to court participants to help ensure their success. This case management approach increases public safety and reduces recidivism, incarceration, and institutionalism. The VTC recognizes the collateral consequences of combat. Over 140 military veterans have successfully graduated from this program since its inception in February 2015.

### **AB 2542, Racial Justice Act**

AB 2542, known as the California Racial Justice Act of 2020, took effect on January 1, 2021. The Act allows the defense to challenge criminal charges, sentences, or vacate a conviction in which judgment has not been entered, by demonstrating that racial discrimination or bias played a role in the prosecution. To seek relief, the defense is required to file a written motion, and an evidentiary hearing must be set.

The Public Defender has a Deputy Public Defender dedicated to litigating violations of the Racial Justice Act. The Deputy Public Defender files discovery motions and motions to dismiss cases infected by explicit bias. The Public Defender has been collecting data and partnered with Stanford University and a statistician to analyze the information and create easily-searchable charts. These tools will help identify trends and create future motions to show implicit bias. The Deputy Public Defender also provides training to the San Joaquin County Public Defender's Office, the San Joaquin

County Bar Association, and Public Defender offices throughout the State. The Deputy Public Defender will also work with the California Penal Code Revision Committee, which includes elected officials and judges, to discuss concerns and provide suggestions regarding the implementation of the Racial Justice Act.

The State Legislature has approved Assembly Bill 256, and effective January 1, 2024, the Racial Justice Act will become retroactive. This means any incarcerated individual could request to have their case reviewed for eligibility. This lengthy process requires a review of the entire case file, including police reports, handwritten notes, motions and transcripts, as well as statistical data for any evidence of racial bias. Because the State has not limited the Racial Justice Act to specific charges, all prior clients could request to have their case reviewed.

### **Project Navigate Constructive Change (PNCC)**

The Public Defender continues its participation with other County departments in PNCC, a young adult program to divert those charged with low-level criminal offenses from traditional incarceration. The Deputy Public Defender refers potential clients to the project, attends monthly meetings regarding the participants, represents their interests in court, and takes part in the graduation ceremony. Once enrolled in the year-long program, the participant receives an individualized case plan that addresses their needs. To date, 138 participants have graduated from the PNCC program.

### **Project Navigate Constructive Change-Restorative Justice (PNCC-RJ)**

In 2022, a second PNCC program was created which added a Restorative Justice component, referred to as PNCC-RJ. This new program provides individuals charged with domestic violence an opportunity to learn to cope and repair the damage caused by domestic violence. Both the individual and the affected party complete an assessment and receive an individualized case plan. Case plans may include group meetings, individual and family counseling, job training, financial literacy classes, restitution, etc. There are currently 14 individuals enrolled in PNCC-RJ, and six have successfully graduated from the program. The Public Defender expects those numbers to increase in 2023-2024.

### **Clean Slate**

The Clean Slate program began in July 2020 when the Public Defender hired a paralegal to process expungements, reductions, record sealing, and Certificates of Rehabilitation. The Public Defender partners with Stanford, McGeorge, and Humphreys law schools to host Clean Slate clinics to provide relief to hundreds of clients.

# 2020400000—Public Defender

## Law & Justice

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Demand for restorative services increases as the Public Defender increases online and social media presence and in response to its collaboration with agencies such as WorkNet, Salvation Army, Department of Child Support Services, and the National Association for the Advancement of Colored People (NAACP). The Public Defender expects to file approximately 1,700 petitions by the end of fiscal year 2022-2023. The passage of AB 731 permits persons sentenced to State prison to apply for expungement, and the Public Defender expects that number to grow in 2023-2024.

### Outreach Activities

The Public Defender provides up to 300 non-mandated remote appearances by attorneys at community activities, schools, community centers, service groups, Delta College's Pathways to Law program, various law schools' career meet-and-greets, and non-profit organizations to discuss the criminal justice system and the role of the Public Defender. The Public Defender provides volunteers to First Impression, Mock Trial, Just the Girls, and other community activities, which provide opportunities for youth.

The Public Defender's Office actively participates in the Homeless Outreach Team, a multi-agency cooperation that seeks out individuals experiencing homelessness to provide food, clothing, medication, and other needs. The Public Defender has organized jacket, socks, and blanket drives to distribute to the homeless.

Further, the Public Defender collaborates with advocacy organizations and other community groups to develop and implement Second Chance programs and restorative justice programs within the County, including collaborating with the NAACP.

### Public Defense Pilot Project Grant

The Public Defender has received a Public Defense Pilot Project grant, a program created by SB 129, of \$927,169 for 2023-2024. In 2022-2023, the Public Defender received \$932,789, for a total grant award of \$1,859,957 over the two fiscal years. The original grant from the State was for \$2,798,366 over three years. However, State budget cuts reduced the annual award from \$932,789 to \$927,169 and eliminated the third year of funding. The Public Defender must spend the \$1,859,957 it has received before March 1, 2025.

The Public Defense Pilot Project applies to four categories of post-conviction relief, including SB 1437, Penal Code (PC) 3051, and PC 1170(d)(1). The program's goal is to increase access to resentencing and conviction relief, decrease the likelihood of recidivism, and improve public safety while still holding the offenders accountable.

The grant allowed the Public Defender's Office to hire two additional Deputy Public Defenders and a Social Worker in 2022-2023, and to cover the costs of experts and transcripts. The Deputy Public Defenders and Social Worker review case files, acquire prison records, meet with clients, conduct legal research, prepare filings, handle court litigation and develop re-entry plans for clients exiting prison. The most common statutes addressed with this grant funding are:

- **SB 1437** redefined first and second-degree murder liability and provided for previously-convicted inmates or parolees to petition for relief and resentencing. The Public Defender's Office continues to review hundreds of case files for eligibility. In October 2021, SB 775 passed, which expanded SB 1437 relief to those convicted of manslaughter or attempted murder, drastically expanding the number of clients potentially eligible for relief.
- **Youth Offender Parole (PC 3051)** resulted from the recognition that brain development is not complete until age 26. The Youth Offender Parole law requires the Parole Board give special consideration to the hallmark characteristics of youth when determining whether to grant parole. The Public Defender's Office submits such "youth factors" to the trial court, which must consider them at the parole hearing.
- **PC Section 1170(d)(1)** permits certain sentences of clients currently serving time in State prison to be recalled and the client to be resentenced.

### Collaborative Court

The Collaborative Court serves as a post-incarceration, post-conviction program for individuals convicted of misdemeanor or felony offenses. These courts include Parole Re-entry and Post-Release Community Supervision. In 2022-2023, the Collaborative Court served approximately 1,270 clients. A research study concluded that for every \$1.00 invested in Collaborative Court, the taxpayer receives \$2.00 in savings due to positive outcomes, such as a lower recidivism rate for its participants.

### Senate Bill 384

Senate Bill 384 took effect on July 1, 2021. This bill created a three-tiered registration requirement for individuals convicted of a sex-related offense. Candidates in Tier I can apply to have their registration terminated after 10 years if they are not a risk to public safety and have continuously registered. Tier II candidates must wait 20 years before they can apply for termination. Tier III candidates are required to remain registered for a lifetime. The Public Defender expects to file approximately 75 petitions for relief in 2022-2023.

# 2020400000—Public Defender

## Law & Justice

### Proposition 172

In 1993, Proposition 172 established a permanent Statewide half-cent sales tax to provide funding for qualifying public safety programs. Funds are collected by the State Board of Equalization and apportioned to each county based on its proportionate share of Statewide taxable sales.

AB 2788 created a Maintenance of Effort (MOE) provision requiring cities and counties to maintain funding levels to public safety programs that receive Proposition 172 funds. AB 2788 also established 1992-1993 as the MOE base year and required an adjustment to MOE levels based on the annual change in Proposition 172 revenues. In 1992-1993, the total for all qualifying budgets in the County was \$68,997,254 (base year).

The current program allocation formula for the County was established by the Board of Supervisors on May 24, 1994 (B-94-613), which allocates Proposition 172 revenue to the Sheriff (68.1%), Probation (13%), District Attorney (11%), and the Public Defender/Court Assigned Counsel (7.9%).

In 2022-2023, the MOE for all qualifying public safety programs was \$156,398,835. The County's adjusted AB 2788 Certification for 2022-2023 was \$270,750,814. Overall, the General Fund provided overmatching funds of \$114,351,979 to all qualifying public safety programs. Not all budgets are included for each public safety department.

Public Defender and Court Assigned Counsel combined made up \$17.9 million of the County's MOE. The chart below illustrates that County General funds provided approximately \$8.1 million above the required MOE for 2022-2023.

### Public Safety Fund (Proposition 172) – AB 2788 Maintenance of Effort

<i>Indigent Defense</i>	2022-2023 Adopted	AB 2788 Adjustments				Adjusted AB 2788	1992-1993	Prop 172	Overmatch
		State/Federal Grant	Charges for Services	Trust Fund	Fixed Assets		Base Year	MOE	
Public Defender	22,622,064	(2,132,788)	(573,008)	0	0	19,916,268	5,077,086	11,508,434	8,407,834
Court Assigned Counsel	6,022,104	0	0	0	0	6,022,104	2,798,964	6,344,524	(322,420)
<b>Total</b>	<b>28,644,168</b>	<b>(2,132,788)</b>	<b>(573,008)</b>	<b>0</b>	<b>0</b>	<b>25,938,372</b>	<b>7,876,050</b>	<b>17,852,958</b>	<b>8,085,414</b>

### Supplemental Request

The Public Defender is requesting supplemental funding totaling \$612,836 for the following:

#### Defender by Karpel

Funding of \$450,500 is requested for the purchase, development, and implementation of Defender by Karpel (DbK). As the District Attorney's Office moves to a solely digital office with Prosecutor by Karpel, the Public Defender cannot accept and store discovery electronically. DbK will sync with the District Attorney's case management system and share all information and evidence between the two offices within seconds. DbK would also interface with Axon, allowing the Public Defender to link body worn cameras and other videos to each case automatically and to view the videos directly through the case file in DbK. DbK would increase office efficiency and achieve the goal of becoming paperless.

#### Social Worker Supervisor

Funding of \$127,508 is requested to add a Social Worker Supervisor position (and delete a vacant Social Worker III

position) to supervise other social workers and handle dependency cases. The offsetting decrease in salary and benefits results in a net request of \$5,669.

#### Senior Social Worker

Funding of \$104,368 is requested to add a Senior Social Worker position to handle mental health conservatorship, writ, and capacity investigations.

#### Increase Extra Help (0.7 Full-Time Equivalent)

Funding of \$27,299 is requested to increase part-time extra help by 0.7 FTE to accommodate an additional Student Law Clerk to support the Racial Justice Act attorney, SB 384 (Tiered Sex Offender Registration) attorney, and assist with writing motions for the Felony Trial Team.

#### Training

Funding of \$25,000 is requested to increase training opportunities to better develop staff and improve competent criminal defense.

The recommended budget has been augmented by \$612,836 to address these requests.

# 2020400000—Public Defender

## Law & Justice

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>Special Circumstances</i>	7	6	2	8	8
<i>Felony</i>	2,975	3,629	3,213	3,200	3,300
<i>Superior Court Direct/Grand Jury</i>	12	0	0	0	5
<i>Violations of Probation-Felony</i>	1,089	1,022	807	810	810
<i>Violations of Probation-Misdemeanor</i>	1,289	1,108	1,143	1,050	1,050
<i>Misdemeanor</i>	3,450	3,640	3,274	2,950	3,000
<i>Traffic</i>	865	1,112	1,378	1,370	1,370
<i>Juvenile Dependency</i>	215	215	239	245	250
<i>Juvenile Delinquency</i>	582	494	533	440	450
<i>Mental Health Habeas Corpus</i>	217	275	361	330	330
<i>Mental Health Capacity/LPS</i>	297	399	393	420	420
<i>Special Proceedings</i>	584	888	1,000	985	985
<i>Guardianship &amp; Conservatorship</i>	178	123	165	150	150
<i>Proposition 63</i>	611	219	301	200	220
<i>Collaborative Court*</i>	N/A	1,174	596	670	670
<i>Section 6500</i>	9	5	11	6	6
<i>Civil Contempt</i>	34	25	25	30	30
<i>Motions</i>	181	322	449	425	700
<i>Writs</i>	53	20	51	120	120
<i>Violations of Community Supervision</i>	444	507	470	470	470
<i>Conditional Release Program</i>	3	0	1	4	4
<i>Parole Violations</i>	145	113	119	130	130
<i>Proposition 47 Petitions-Filed**</i>	1,782	644	200	100	N/A
<i>Proposition 47 Petitions-Litigated**</i>	180	60	20	10	N/A
<i>Proposition 57 Judicial Transfer Hearings</i>	10	4	5	9	8
<i>Proposition 64***</i>	10	4	4	4	N/A
<i>California Health Care Facility</i>	77	46	45	45	45
<i>Veterans' Court</i>	46	76	79	85	90
<i>Clean Slate****</i>	N/A	N/A	1,142	1,700	2,200
<i>Senate Bill 384****</i>	N/A	N/A	16	75	80
<i>Resentencing Petitions/Franklin****</i>	N/A	N/A	74	270	250
<i>Senate Bill 1437 Petitions Reviewed</i>	89	40	40	68	80
<b>Total</b>	<b>13,418</b>	<b>15,511</b>	<b>15,932</b>	<b>16,265</b>	<b>17,231</b>

\*Collaborative Court did not exist prior to 2020-2021.

\*\*The deadline to file petitions under Prop 47 was November 4, 2022.

\*\*\*The Court was ordered to identify and automatically resentence defendants in all Prop 64 eligible cases after AB 1793 was passed in 2018. The Court has advised the Public Defender that defendants in all eligible cases have been resentenced.

\*\*\*\*These statutes were not in effect prior to 2021-2022.

# 2021000000—Grand Jury

## Law & Justice

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$180,918	\$199,042	\$225,474	\$225,474	\$26,432
<i>Centrally-Budgeted Expenses</i>	2,007	(2,387)	14,061	14,061	16,448
<i>Total Appropriations</i>	\$182,925	\$196,655	\$239,535	\$239,535	\$42,880
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$182,925	\$196,655	\$239,535	\$239,535	\$42,880

## Purpose

Article I, Section 23, of the California Constitution requires that a Grand Jury be summoned annually in each county. The Grand Jury investigates the operations of county and city governments; selectively examines the books, records, and the accounts of county offices; reports the findings to the Board of Supervisors in an annual report; investigates charges of public offenses committed or triable within the county, and may bring forth indictments.

This budget includes funding for Grand Jury stipends, mileage reimbursement, transcription services, clerical support, training, travel expenses, and other costs incurred by the Civil Grand Jury. Funds are also provided for impaneling separate Criminal Grand Juries as needed. The Civil and Criminal Grand Juries each include 19 members and 10 alternates. Both Civil and Criminal Grand Jurors receive a stipend of \$15 per meeting, plus mileage reimbursement.

## Program Discussion

The 2023-2024 recommended budget for the Grand Jury totals \$239,535, which is an increase of \$42,880 from the 2022-2023 adjusted budget. Court staff concur with this recommendation.

Workload Data					
	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Civil Grand Juries</b>					
<i>Investigations</i>	10	1	3	1	1
<b>Criminal Grand Juries</b>					
<i>Days Impaneled</i>	0	6	24	10	24
<i>Indictments Issued</i>	0	1	4	0	4



# 2021000000—Grand Jury

## Law & Justice

### Final Grand Jury Reports

#### *2020-2021 Final Reports*

#### *Case #*

San Joaquin County: A Fragmented COVID-19 Response	0120
Independent Special Districts: Transparency “Not Found”	0220
City of Manteca: A City Government in Turmoil	0320
Stockton Unified School District Board of Trustees: Dissension, Dismay, Disarray	0620
2020-2021 Law and Justice Report – Overview	–
Review/Follow-Up investigation of four cases from 2018-2019; and three cases from 2019-2020	–

#### *2021-2022 Final Reports*

#### *Case #*

Stockton Unified School District: A Failing Grade in Public Trust	0121
San Joaquin County and Its Seven Cities: Cybersecurity: A Local Defense Against a Global Threat	0321
Lathrop-Manteca Fire District: A Work in Progress: From Turmoil to Healing	0721
2021-2022 Law and Justice Report – Overview	–
Review/Follow-Up investigation of one case from 2018-2019, one case from 2019-2020, and four cases from 2020-2021	–

# 2021274000—County Support to the Courts

## Law & Justice

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$10,452,784	\$9,938,668	\$10,126,203	\$10,126,203	\$187,535
Centrally-Budgeted Expenses	362,103	1,436,927	390,108	390,108	(1,046,819)
Total Appropriations	\$10,814,887	\$11,375,595	\$10,516,311	\$10,516,311	(\$859,284)
<b>Earned Revenues By Source</b>					
Fines/Forfeitures/Penalties	\$2,405,036	\$2,818,500	\$2,632,660	\$2,632,660	(\$185,840)
Aid From Other Governments	24,417	24,000	16,230	16,230	(7,770)
Charges For Services	766,380	870,520	706,750	706,750	(163,770)
Operating Transfers In	206,874	0	0	0	0
Total Revenues	\$3,402,707	\$3,713,020	\$3,355,640	\$3,355,640	(\$357,380)
<b>Net County Cost</b>	\$7,412,180	\$7,662,575	\$7,160,671	\$7,160,671	(\$501,904)

## Purpose

This budget provides the County's Maintenance-of-Effort payments to the State for the operation of the courts, extraordinary expenditures associated with death penalty capital cases, and court-related costs not recognized by the State under its definition of "court operational cost."

## Major Budget Changes

### Services & Supplies

- \$112,271 Increase in investigative costs due to a potential capital case.
- \$62,780 Increase in attorney costs due to a potential capital case.
- \$19,505 Increase in the Court Facility Payment for the Juvenile Justice Center.
- (\$6,620) Decrease in juror parking costs.

### Centrally-Budgeted Expenses

- \$16,624 Increase in Casualty insurance costs.
- (\$1,063,443) Cost Allocation Plan adjustment.

### Revenues

- (\$185,840) Decrease in revenue from court fines, forfeitures, and penalties.
- (\$163,770) Decrease in charges for services.
- (\$7,770) Decrease in revenue from State fines and rebates.

## Program Discussion

The 2023-2024 recommended County Support to the Courts budget totals \$10,516,311, which is a decrease of \$859,284 from the 2022-2023 adjusted budget.

### Mandated Expenses

The County projects investigative services for indigent defense will cost \$359,566 in 2022-2023, an 86% increase compared to 2021-2022. The County Administrator expects this trend will continue in 2023-2024 because the Public Defender is preparing its defense for at least one potential capital case expected to go to trial in San Joaquin County.

The County is mandated to provide these services to ensure indigent defendants receive equal protection and due process under the law, as protected by the 14<sup>th</sup> Amendment.

### Declining Revenues

In addition to increasing expenses, the County Support to the Courts budget has been affected by declining revenue from fines, forfeitures, and penalties in recent years:

Year	Fines, Forfeitures, & Penalties
2015-2016	\$4,156,853
2016-2017	\$3,291,757

# 2021274000—County Support to the Courts

## Law & Justice

Year	Fines, Forfeitures, & Penalties
2017-2018	\$2,998,795
2018-2019	\$2,872,325
2019-2020	\$2,840,354
2020-2021	\$2,413,754
2021-2022	\$2,405,036

This trend has begun to level off, and the County Administrator projects fines, forfeitures, and penalties will remain relatively stable in 2023-2024.

The decrease in revenue from fines, forfeitures, and penalties is due to the State's attempt to reduce their harmful effect on defendants who cannot afford to pay. A recent example is Assembly Bill (AB) 199, which went into effect on July 1, 2022, and reduced the civil assessment against a defendant who fails to appear in court or pay the entirety of a fine or bail installment. Previously, the court could impose a civil assessment of up to \$300. With the passage of AB 199, this amount cannot exceed \$100.

### Distribution of Funds

	Actual			Adjusted	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Paid to Superior Court</b>					
<i>Maintenance of Effort</i>					
<i>Trial Court - County Contribution</i>	\$6,543,068	\$6,543,068	6,543,068	\$6,543,068	\$6,543,070
<i>Trial Court - Fees &amp; Fines</i>	2,158,804*	2,158,804*	2,158,804	2,158,803	2,158,800
<i>Court Facility Payment</i>	724,000*	724,000*	724,000	723,998	743,503
<i>Settlements to Superior Court</i>	7,872,540	N/A**	N/A**	N/A**	N/A**
<b>Sub-Total</b>	<b>\$17,298,412*</b>	<b>\$9,425,872*</b>	<b>\$9,425,872</b>	<b>\$9,425,869</b>	<b>\$9,445,373</b>
<b>Paid to Others</b>					
<i>Attorney and Investigative Services</i>	\$377,130*	\$189,036*	\$224,268	\$272,299	\$447,350
<i>Rents/Leases</i>	212,542*	218,094*	206,877	N/A	N/A
<i>Juror Parking/Bus Passes</i>	120,500	132,122*	240,529	240,500	233,480
<i>Casualty Insurance</i>	38,315	72,148	78,210	103,063	119,687
<i>Allocated Costs (A-87)</i>	(788,939)	195,745	283,893	1,333,864	270,421
<b>Sub-Total</b>	<b>(\$40,452)*</b>	<b>\$807,145*</b>	<b>\$1,033,777</b>	<b>\$1,949,726</b>	<b>\$1,070,938</b>
<b>Total</b>	<b>\$17,257,960</b>	<b>\$10,233,017*</b>	<b>\$10,459,649</b>	<b>\$11,375,595</b>	<b>\$10,516,311</b>

\*Restated

\*\*The County's settlement with the State (B-20-241) for the purchase of the Stockton Courthouse was satisfied in 2019-2020.

# 2021300000—Court Assigned Counsel

## Law & Justice

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$5,676,775	\$6,013,566	\$6,532,989	\$6,532,989	\$519,423
<i>Centrally-Budgeted Expenses</i>	29,379	8,538	14,003	14,003	5,465
<i>Total Appropriations</i>	\$5,706,154	\$6,022,104	\$6,546,992	\$6,546,992	\$524,888
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$5,706,154	\$6,022,104	\$6,546,992	\$6,546,992	\$524,888

## Purpose

Court Assigned Counsel provides indigent defense services when the Public Defender has declared a conflict-of-interest or is otherwise unavailable. This budget funds defense attorneys, investigators, witnesses, interpreters, and other costs related to cases appointed by the Superior Court. The County currently contracts with San Joaquin County Bar Association (SJCBA) to administer the various legal services.

## Major Budget Changes

### Services & Supplies

- \$630,411 Increase in SJCBA attorney costs based on contract rates.
- \$13,200 Increase in SJCBA administrative costs based on contract rates.
- (\$117,758) Decrease in investigator expenses based on the actual cost in previous years.
- (\$10,250) Decrease in witness fees based on the actual cost in previous years.

## Program Discussion

The 2023-2024 recommended budget for the Court Assigned Counsel totals \$6,546,992, which is an increase of \$524,888 from the 2022-2023 adjusted budget.

The County issued a Request for Proposals for Court Assigned Counsel on December 22, 2022, and the San Joaquin County Bar Association (SJCBA) was the lowest responsible bidder. Staff anticipates the Board of Supervisors will approve a five-year agreement before the start of 2023-2024. The terms are not final, but the 2023-2024 recommended budget includes the expected cost of the agreement.

For this service, the County typically pays an hourly rate determined by the case type. The proposed hourly rates represent an average increase of 19.2% in relation to the previous agreement. Ensuing years will see modest rate increases of 3.0% to 4.0%.

### Resentencing and Motions to Vacate Convictions

In addition to increasing rates, State legislation related to resentencing and motions to vacate convictions has affected this budget unit:

- **Senate Bill (SB) 1437** – Amended the first-degree felony-murder rule to prohibit an accomplice from being held liable for murder; unless they intended to assist in the murder or were a major participant in the underlying felony and acted with reckless indifference to human life. SB 1437 is also retroactive and created a procedure to recall and vacate convictions where a defendant could not be found guilty of murder after its enactment.
- **Assembly Bill (AB) 1259** – Expanded existing law to allow a person no longer in criminal custody to file a motion to vacate a conviction or sentence if it is legally invalid due to a prejudicial error that damaged their ability to meaningfully understand, defend against, or knowingly accept the actual or potential adverse immigration consequences of a conviction or sentence. Before AB 1259, this provision only applied to individuals who entered a plea of guilty or nolo contendere.

# 2021300000—Court Assigned Counsel

## Law & Justice

- **SB 775** – Extended relief under SB 1437 to include aiders and abettors who never had the intent to kill but were found guilty of attempted murder, and certain people who were charged with murder but convicted of manslaughter. With the passage of SB 775, these individuals can petition the court for resentencing on a lesser crime.

These legislative actions have increased petitions for resentencing and motions to vacate on behalf of individuals who believe they are eligible for relief.

### Social Workers and Indigent Defense

Social workers began working in indigent defense offices in the 1970s, and they play an essential role in the effective defense of clients. Social workers can improve the quality of

indigent defense by considering the client holistically and providing the court with insights into the extenuating circumstances behind their actions.

Further, they are often responsible for evaluating client needs and referring them to services to support their success in the community. In doing so, social workers support client well-being and can help reduce recidivism.

SJCBA has agreed to incorporate social workers in its pending agreement with the County. This addition will more closely align the services provided by SJCBA with those available to clients served by the Public Defender's Office. The County anticipates this change will simultaneously improve the quality of its indigent defense system while increasing public safety.

### Workload Data

	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021	2021-2022		
<i>Civil/Other</i>	13	31	17	9	12
<i>Class I Felony</i>	127	129	128	220	240
<i>Class II Felony</i>	437	353	414	497	497
<i>Domestic Violence</i>	7	0	8	12	12
<i>Felony (Murder)</i>	12	17	20	37	37
<i>Juvenile Delinquency</i>	314	232	266	262	262
<i>Minor Felony</i>	419	550	444	546	546
<i>Misdemeanor</i>	557	606	682	718	718
<i>Misdemeanor Appeals</i>	26	27	33	22	22
<i>Pro Per</i>	15	8	24	10	10
<i>Senate Bill 1437</i>	11	5	61	40	40
<i>Sexually Violent Predator</i>	2	5	1	4	4
<i>Special Circumstances (Murder)</i>	14	11	14	8	8
<i>Youth Authority Placement</i>	0	1	1	6	6
<b>Total New Cases Assigned</b>	<b>1,954</b>	<b>1,975</b>	<b>2,113</b>	<b>2,391</b>	<b>2,414</b>

# Summary – All Sheriff Budgets

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$152,405,613	\$156,551,208	\$179,536,947	\$179,536,947	\$22,985,739
Services & Supplies	17,247,923	24,987,219	28,177,591	28,177,591	3,190,372
Centrally-Budgeted Expenses	17,183,645	18,598,287	21,891,822	21,891,822	3,293,535
Other Charges & Uses	1,107,769	1,494,657	1,656,498	1,656,498	161,841
Capital Expenditures	1,073,845	3,737,398	3,832,957	3,832,957	95,559
Operating Transfers Out	90,600	102,536	90,800	90,800	(11,736)
Total Expenditures	\$189,109,395	\$205,471,305	\$235,186,615	\$235,186,615	\$29,715,310
Expenditure Reimbursements	(2,025,174)	(1,050,327)	(1,193,535)	(1,193,535)	(143,208)
Total Appropriations	\$187,084,221	\$204,420,978	\$233,993,080	\$233,993,080	\$29,572,102
<b>Earned Revenues By Source</b>					
Taxes	\$256,188	\$256,188	\$370,730	\$370,730	\$114,542
Licenses/Permits/Franchises	117,112	120,004	126,754	126,754	6,750
Fines/Forfeitures/Penalties	109,256	94,700	106,800	106,800	12,100
Interest/Rents	14,413	173	750	750	577
Aid From Other Governments	77,623,386	74,961,439	86,601,804	86,601,804	11,640,365
Charges For Services	11,140,947	4,870,524	4,600,806	4,600,806	(269,718)
Miscellaneous Revenues	302,079	87,347	86,365	86,365	(982)
Operating Transfers In	19,250,120	24,789,674	27,629,469	27,629,469	2,839,795
Fund Balance	(587,878)	1,857,820	1,905,116	1,905,116	47,296
Total Revenues	\$108,225,623	\$107,037,869	\$121,428,594	\$121,428,594	\$14,390,725
<b>Net County Cost</b>	\$78,858,598	\$97,383,109	\$112,564,486	\$112,564,486	\$15,181,377
<b>Allocated Positions</b>	878.0	867.0	875.0	875.0	8.0
<b>Temporary (Full-Time Equivalent)</b>	27.3	24.7	22.9	22.9	(1.8)
<b>Total Staffing</b>	905.3	891.7	897.9	897.9	6.2

## Purpose

The Sheriff's Office is responsible for preserving the peace, enforcing the law, and administering contract policing in the unincorporated areas of San Joaquin County. The Sheriff is mandated to provide and operate a correctional and detention facility and provide bailiff services for courts operating within the County. As the Public Administrator, the Office also investigates and administers estates of decedents where no one is willing or able to administer the estate. The Sheriff's Office also serves court processes and provides animal control services throughout the County.

This is a summary of the budgets administered by the Sheriff's Office:

- 2021602000 Boating Safety
- 2021609000 Cal-MMET
- 2021614000 Special Services Division
- 2021615000 Mountain House

# Summary – All Sheriff Budgets

## Law & Justice

- 2021619000 Animal Services
- 2021620000 Patrol
- 2021622000 Communications
- 2021626000 Detectives
- 2021628000 Records
- 2021635000 Civil
- 2021645000 Administration/Information Systems
- 2021650000 Lathrop Police Contract
- 2021658000 Court Services
- 2022600000 Custody
- 2022610000 Local Community Corrections
- 2022620000 Work Programs
- 2025700000 Public Administrator
- 2026500000 Fish & Game Propagation
- State COPS Patrol & Custody
- Operational Grants
- Special Fund Programs

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Reform the recruitment process by shortening the length of time between the application and certified list for Deputy Sheriffs and Correctional Officers.	80-day average	60-day average	June 30, 2024
	60-day average	30-day average	June 30, 2025
➤ Reform the pre-employment arduous exam process for Deputy Sheriffs and Correctional Officers to reduce the average number of days to receive results.	37-day average	20-day average	June 30, 2024
	20-day average	7-day average	June 30, 2025
Demonstrate Leadership Development	Current	Target	Deadline
➤ Develop and implement a POST-approved internal leadership course targeting mid-managers and lieutenants to improve internal awareness, unity of command, accountability, motivation, and inspiration.	0% trained	50% trained	June 30, 2024
	50% trained	100% trained	June 30, 2025
Augment Digitization and Automation	Current	Target	Deadline
➤ Deploy cameras/license plate readers in known dumping locations to prevent and identify suspects, and make arrests of those responsible for illegal dumping.	6 cameras	16 cameras	June 30, 2025

# Summary – All Sheriff Budgets

## Law & Justice

Public Safety/Criminal Justice/Quality of Life			
Reduce Response Times for Emergency Services	Current	Target	Deadline
➤ Hire, train, and deploy staff utilizing intelligence and evidence-based policing to reduce overall response time by 5% each year.	21 minutes	20 minutes	June 30, 2023
	20 minutes	19 minutes	June 30, 2024
	19 minutes	18 minutes	June 30, 2025
Mitigate Illegal Dumping/Human Waste	Current	Target	Deadline
➤ Reduce human waste and dumping incidents by 2% each year.	450 incidents	441 incidents	June 30, 2023
	441 incidents	432 incidents	June 30, 2024
	432 incidents	423 incidents	June 30, 2025
Homelessness			
Mitigate Illegal Dumping Encampments	Current	Target	Deadline
➤ Mitigate, remove, and maintain areas occupied or formerly occupied by homeless encampments by 10% each year.	28 former areas require routine maintenance	25 former areas require routine maintenance	June 30, 2023
	25 former areas require routine maintenance	22 former areas require routine maintenance	June 30, 2024
	22 former areas require routine maintenance	20 former areas require routine maintenance	June 30, 2025

### Proposition 172

In 1993, Proposition 172 established a permanent Statewide half-cent sales tax to provide funding for qualifying public safety programs. Funds are collected by the State Board of Equalization and apportioned to each county based on its proportionate share of Statewide taxable sales.

AB 2788 created a Maintenance of Effort (MOE) provision requiring cities and counties to maintain funding levels to public safety programs that receive Proposition 172 funds. AB 2788 also established 1992-1993 as the MOE base year and required an adjustment to MOE levels based on the annual change in Proposition 172 revenues. In 1992-1993, the total for all qualifying budgets in the County was \$68,997,254 (base year).

The current program allocation formula for the County was established by the Board of Supervisors on May 24, 1994 (B-94-613), which allocates Proposition 172 revenue to the Sheriff (68.1%), Probation (13%), District Attorney (11%), and the Public Defender/Court Assigned Counsel (7.9%).

In 2022-2023, the MOE for all qualifying public safety programs was \$156,398,835. The County's adjusted AB 2788 Certification for 2022-2023 was \$270,750,814. Overall, the General Fund provided overmatching funds of \$114,351,979 to all qualifying public safety programs. Not all budgets are included for each public safety department.

The Sheriff's portion of the MOE was \$95.8 million. The chart below illustrates that County General funds provided approximately \$62.5 million above the required MOE for 2022-2023.

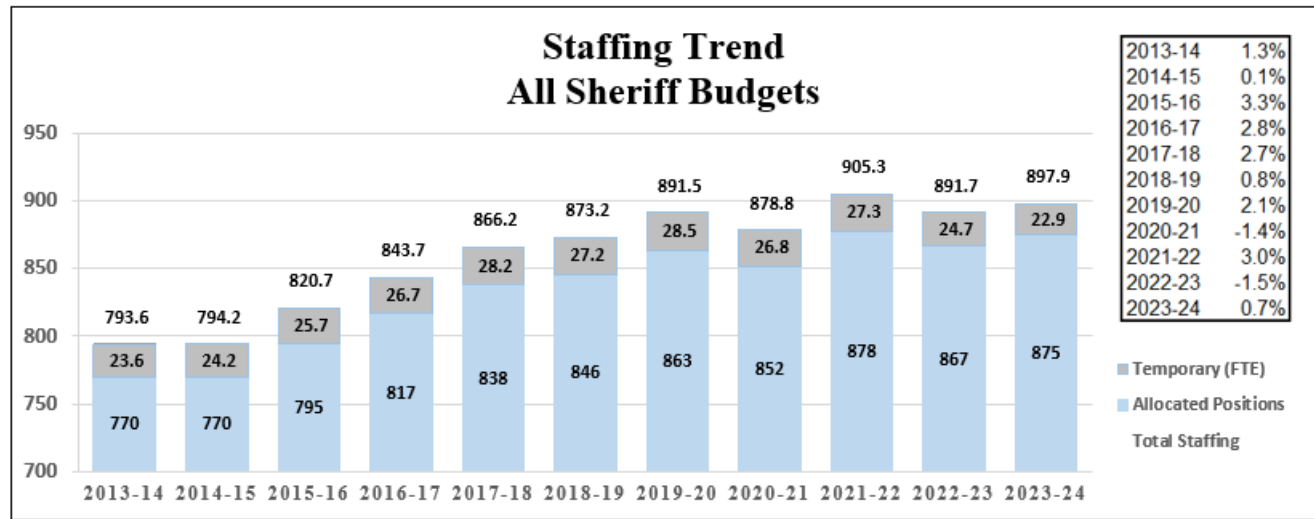


# Summary – All Sheriff Budgets

## Law & Justice

### Public Safety Fund (Proposition 172) – AB 2788 Maintenance of Effort

Sheriff	2022-2023 Adopted	AB 2788 Adjustments				Adjusted AB 2788	1992–1993 Base Year	Prop 172 MOE	Overmatch
		State/Federal Grant	Charges for Services	Trust Fund	Fixed Assets				
Boating Safety	2,631,606	(698,424)	0	0	(13,634)	1,919,548	504,000	1,142,437	777,111
Patrol	36,719,455	(373,194)	(543,647)	(138,000)	(867,288)	34,797,326	8,619,072	19,537,195	15,260,131
Communications	5,292,982	(8,731)	(100,465)	0	0	5,183,786	1,795,358	4,069,610	1,114,176
Detectives	13,379,421	(375,619)	(88,000)	(23,400)	(123,337)	12,769,065	2,057,798	4,664,493	8,104,572
Records	5,692,974	(4,742)	(113,416)	0	0	5,574,816	2,893,710	6,559,288	(984,472)
Civil	2,617,947	0	(840,711)	0	0	1,777,236	681,465	1,544,704	232,532
Administration/Support	12,102,917	(160,000)	(85,242)	(206,544)	0	11,651,131	1,926,664	4,367,246	7,283,885
Information Systems	4,818,015	(118,825)	(33,000)	0	(70,550)	4,595,640	-	0	4,595,640
Custody	69,912,283	(2,023,587)	(7,063)	(2,249,259)	(7,660)	65,624,714	23,108,943	52,381,965	13,242,749
Work Programs	1,298,468	(901,774)	0	0	0	396,694	686,643	1,556,441	(1,159,747)
Correctional Health Care	15,100,327	(1,008,669)	0	0	(45,705)	14,045,953	-	0	14,045,953
<b>Total</b>	<b>169,566,395</b>	<b>(5,673,565)</b>	<b>(1,811,544)</b>	<b>(2,617,203)</b>	<b>(1,128,174)</b>	<b>158,335,909</b>	<b>42,273,653</b>	<b>95,823,380</b>	<b>62,512,529</b>



# 2021602000—Sheriff-Boating Safety

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,845,638	\$2,079,339	\$2,339,183	\$2,339,183	\$259,844
Services & Supplies	305,757	344,938	348,730	348,730	3,792
Centrally-Budgeted Expenses	163,325	202,795	220,608	220,608	17,813
Capital Expenditures	0	60,634	0	0	(60,634)
Total Expenditures	\$2,314,720	\$2,687,706	\$2,908,521	\$2,908,521	\$220,815
Expenditure Reimbursements	(6,000)	0	0	0	0
Total Appropriations	\$2,308,720	\$2,687,706	\$2,908,521	\$2,908,521	\$220,815
<b>Earned Revenues By Source</b>					
Taxes	\$256,188	\$256,188	\$370,730	\$370,730	\$114,542
Fines/Forfeitures/Penalties	200	0	600	600	600
Aid From Other Governments	1,365,169	839,817	786,906	786,906	(52,911)
Total Revenues	\$1,621,557	\$1,096,005	\$1,158,236	\$1,158,236	\$62,231
<b>Net County Cost</b>	\$687,163	\$1,591,701	\$1,750,285	\$1,750,285	\$158,584
<b>Allocated Positions</b>	7.0	9.0	9.0	9.0	0.0

## Purpose

The Sheriff's Boating Safety program enforces State and local laws and regulations on the County's waterways. Assigned deputies also inspect vessels, aid injured persons, assist emergency medical personnel, perform search and rescue operations, and recover drowning victims.

## Major Budget Changes

### Salaries & Employee Benefits

- \$259,844 Salary and benefits adjustments.

### Services & Supplies

- \$13,634 Increase in fleet services costs.

### Centrally-Budgeted Expenses

- \$25,735 Increase in Workers' Compensation costs.

### Revenues

- \$114,542 Increase in boat tax revenues.
- \$12,717 Increase in Proposition 172 funding.
- (\$65,628) Decrease in State funding for boat equipment.

## Program Discussion

The 2023-2024 recommended budget for Boating Safety totals \$2,908,521, which is an increase of \$220,815 from the 2022-2023 adjusted budget.

Estimated property tax revenue for the Boating Safety program totals \$370,730, which is an increase of \$114,542 from 2022-2023. Funding from the State Department of Boating and Waterways remains at \$686,596. The recommended budget also includes estimated revenue of \$2,300 for the Department of Boating and Waterways Marine Law Enforcement Training Program, which provides reimbursement for training Boating Safety deputies.

During 2022-2023, the Boating Safety Unit continued its work in removing abandoned vessels from Delta waterways and facilitating vessels turned in using the Vessel Turn-In Program (VTIP), funded by the Surrendered and Abandoned Vessel Exchange (SAVE) grant. Additional details regarding

# 2021602000—Sheriff-Boating Safety

## Law & Justice

the program are discussed in the Sheriff-Operational Grants budget narrative (Abandoned Watercraft #2021608000).

In 2022-2023, the Unit obtained an underwater Remotely Operated Vehicle (ROV). The ROV provides the Boating Unit the capability to assist with underwater security checks at the Port of Stockton and various docks on the Delta Waterways, assist with underwater rescues and recoveries, and assist staff with locating underwater hazards that could potentially cause harm to Delta boaters. Additional details regarding the grant are discussed in the Sheriff-Operational

Grants budget narrative (Port Security Grant Program #2021616000).

The Unit responds to requests from the U.S. Coast Guard to conduct commercial security escorts with a Munson Boat and SAFE Boat purchased through Port Security grants. Illegal occupation of inland islands and transient camps along the waterways continue to contribute to an increase in abandoned vessels, illegal dumping, unlawful activity including trespassing, and environmental pollution. The Unit continues to address these issues as resources allow.

### Workload Data

	<b>2019-2020</b>	<b>Actual— 2020-2021</b>	<b>2021-2022</b>	<b>Est./Act. 2022-2023</b>	<b>Projected 2023-2024</b>
<i>Recreational Boating Contacts</i>	8,181	8,531	9,691	8,700	9,000
<i>Verbal Warnings</i>	250	378	750	450	480
<i>Citations Issued</i>	212	242	257	250	260
<i>Boating Under the Influence Arrests</i>	32	65	41	46	45
<i>Accident Investigation</i>	23	31	39	25	24

# 2021609000-Sheriff-Cal-MMET

## Law & Justice

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General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$687,680	\$666,081	\$3,249,968	\$3,249,968	\$2,583,887
Services & Supplies	233,265	259,061	404,075	404,075	145,014
Centrally-Budgeted Expenses	92,804	130,779	172,335	172,335	41,556
Other Charges & Uses	56,082	56,082	56,082	56,082	0
Capital Expenditures	34,149	105,000	38,186	38,186	(66,814)
Total Expenditures	\$1,103,980	\$1,217,003	\$3,920,646	\$3,920,646	\$2,703,643
Expenditure Reimbursements	(134,669)	0	0	0	0
Total Appropriations	\$969,311	\$1,217,003	\$3,920,646	\$3,920,646	\$2,703,643
<b>Earned Revenues By Source</b>					
Interest/Rents	\$17	\$0	\$0	\$0	\$0
Aid From Other Governments	902,363	975,000	1,145,679	1,145,679	170,679
Miscellaneous Revenues	7,701	0	0	0	0
Operating Transfers In	0	242,003	242,003	242,003	0
Total Revenues	\$910,081	\$1,217,003	\$1,387,682	\$1,387,682	\$170,679
<b>Net County Cost</b>	\$59,230	\$0	\$2,532,964	\$2,532,964	\$2,532,964
<b>Allocated Positions</b>	2.0	2.0	12.0	12.0	10.0

- In 2023-2024, the Cal-MMET budget became a standalone budget unit separate from Sheriff-Operational Grants.

## Purpose

California Multi-Jurisdictional Methamphetamine Enforcement Team (Cal-MMET) focuses on narcotic producers and distributors by creating specialized investigative units, staffed by experienced personnel. The Division operates the Metropolitan Narcotics Task Force (METRO) for San Joaquin County. The Task Force coordinates with other law enforcement agencies to combat narcotic related crimes.

## Major Budget Changes

### Salaries & Employee Benefits

- \$46,438 Salary and benefits adjustments.
- \$2,434,449 Transfer 10 positions from the Detectives (#2021626000) and Patrol (#2021620000) budgets.
- \$103,000 Increase in overtime costs.

### Services & Supplies

- \$75,000 Increase in investigative service costs due to transfer of positions.
- \$28,365 Increase in transportation costs primarily due to addition of new pilot training course.
- \$21,470 Increase in body worn camera equipment costs due to transfer of positions.

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## Law & Justice

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### Centrally-Budgeted Expenses

- \$38,656 Increase in radio maintenance costs.

### Capital Expenditures - Equipment

- \$38,186 Air Fuel Trailer.

### Revenues

- \$95,679 Increase in Federal funding due to transfer of positions.
- \$75,000 Increase in High Intensity Drug Trafficking Areas (HIDTA) revenue due to transfer of positions.

## Program Discussion

The 2023-2024 recommended budget for the California Multi-Jurisdictional Methamphetamine Enforcement Team (Cal-MMET) totals \$3,920,646, which is an increase of \$2,703,643 from the 2022-2023 adjusted budget.

Prior to 2023-2024, the Cal-MMET budget unit was a part of the Operational Grants budget. Beginning in 2023-2024, the Cal-MMET budget (#2021609000) converted to a standalone budget unit, and the Department will track program expenditures to be offset with General Fund and non-General Fund sources.

In 2023-2024, nine positions from Detectives and one position from Patrol were transferred to the Cal-MMET budget. The nine positions transferred from Detectives were one Lieutenant, one Sergeant, five Deputy Sheriffs II, one Senior Office Assistant, and one Office Assistant Specialist. One Deputy Sheriff II was transferred from Patrol, for a total of 10 transferred positions. The Division now consists of one Captain, one Lieutenant, one Sergeant, seven Deputy Sheriffs, one Office Assistant Specialist, and one Senior Office Assistant.

The METRO Task Force coordinates with other law enforcement agencies to combat narcotic related crimes. The Task Force participants include the San Joaquin County Sheriff's Office, San Joaquin County Probation, Stockton Police Department, and the California National Guard. Additional part-time Special Agents are provided by Drug Enforcement Administration and Homeland Security Investigations. In 2022, the Memorandum of Understanding (MOU) was updated and signed by all participating agencies, as well as other local agencies in San Joaquin County.

State funding for 2023-2024 is estimated at \$975,000. An additional \$242,003 will be transferred from asset forfeiture proceeds to support METRO Task Force operations.

### High Intensity Drug Trafficking Areas Grant

The High Intensity Drug Trafficking Areas (HIDTA) initiative provides additional funding that can be applied to overtime and other operational expenses incurred by the Task Force.

The 2023-2024 proposed budget includes \$75,000 in HIDTA funding for overtime and equipment expenses. Should additional funding become available, the Sheriff will return to the Board of Supervisors for approval.

### Drug Enforcement Administration Marijuana Eradication/Suppression Program

The Drug Enforcement Administration (DEA) Marijuana Eradication/Suppression Program provides additional funding that can be applied to overtime and other operational expenses incurred by the Task Force. The 2023-2024 proposed budget includes \$75,000 in DEA funding.

### Organized Crime Drug Enforcement Task Forces Program

The Organized Crime Drug Enforcement Task Forces (OCDETF) Program provides additional funding that can be applied to overtime and other operational expenses incurred by the Task Force. The 2023-2024 proposed budget includes \$20,679 in OCDETF funding.

## Supplemental Requests

Funding is requested in the amount of \$64,051 for the following supplemental requests:

### *New Pilot Course*

Funding is requested in the amount of \$25,865 for a new pilot training course for the METRO pilot.

### *Fuel Trailer*

Funding is requested in the amount of \$38,186 to purchase a fuel trailer for METRO to be stored at the Stockton Metropolitan Airport.

The recommended budget has been augmented by \$64,051 to address these requests.

# 2021609000-Sheriff-Cal MMET

## Law & Justice

### Workload Data

		Actual		Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>METRO Narcotics Task Force Investigations*</i>	203	247	280	320	360
<i>Narcotics Tips Received*</i>	178	198	210	200	220
<i>No Case Narcotics*</i>	89	73	67	70	70
<i>Narcotics Arrests*</i>	192	235	253	260	260
<i>Narcotics Weapons Seized*</i>	102	137	127	125	130
<i>Search Warrants Served</i>	68	93	138	140	150

*\*Transferred from the Detectives budget in 2023-2024.*

# 2021614000—Sheriff-Special Services Division

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

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General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,889,137	\$14,411,275	\$15,697,801	\$15,697,801	\$1,286,526
Services & Supplies	206,651	1,599,524	1,264,470	1,264,470	(335,054)
Centrally-Budgeted Expenses	244,854	372,855	712,219	712,219	339,364
Other Charges & Uses	0	0	90,000	90,000	90,000
Capital Expenditures	12,647	888,500	364,000	364,000	(524,500)
Total Expenditures	\$5,353,289	\$17,272,154	\$18,128,490	\$18,128,490	\$856,336
Expenditure Reimbursements	(220,448)	(687,516)	(687,516)	(687,516)	0
Total Appropriations	\$5,132,841	\$16,584,638	\$17,440,974	\$17,440,974	\$856,336
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$0	\$67,847	\$1,213,832	\$1,213,832	\$1,145,985
Charges For Services	0	0	475,000	475,000	475,000
Operating Transfers In	0	0	220,000	220,000	220,000
Total Revenues	\$0	\$67,847	\$1,908,832	\$1,908,832	\$1,840,985
<b>Net County Cost</b>	\$5,132,841	\$16,516,791	\$15,532,142	\$15,532,142	(\$984,649)
<b>Allocated Positions</b>	21.0	70.0	70.0	70.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	0.0	0.0	5.9	5.9	5.9
<b>Total Staffing</b>	21.0	70.0	75.9	75.9	5.9

## Purpose

Effective July 1, 2021, the Board of Supervisors authorized the creation of the Special Services Division within the Sheriff's Office. The Special Services Division is responsible for the Agriculture, Gang, and Narcotics Enforcement Team (AGNET), the Community Car Program, the Community Revitalization Unit (CRU), and the Crime Analysis Unit.

Prior to 2021-2022, the Division, with the exception of AGNET, was included under the umbrella of the Sheriff's Office Patrol budget (#2021620000). The creation of this new division was authorized by the 2021-2022 recommended budget, which was approved by the Board of Supervisors on June 23, 2021 (R-21-93). In addition to these major programs, the Special Services Division also oversees the School Resource Deputy Program, the Cadet Program, and the Abatement Program. The AGNET Division of the Sheriff's Office provides law enforcement investigative services in the unincorporated areas of the County, as well as technical evidence services to the Sheriff's Office and other agencies.

## Major Budget Changes

### Salaries & Employee Benefits

- \$1,038,148 Salary and benefits adjustments.
- \$248,378 Increase in extra-help costs.

### Services & Supplies

- (\$139,593) Decrease in fleet services costs.
- (\$100,000) Decrease in law enforcement equipment costs.
- (\$93,843) Decrease in costs for body worn cameras.

# 2021614000—Sheriff-Special Services Division

## Law & Justice

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### Centrally-Budgeted Expenses

- \$369,394 Increase in Workers' Compensation insurance costs.
- (\$21,529) Decrease in rents and leases of automation equipment.
- (\$22,163) Cost Allocation Plan adjustment.

### Other Charges

- \$90,000 Increase in illegal dumping charges for 10 cameras and site cleanup.

### Capital Expenditures - Equipment

- \$324,000 Vehicles (4).
- \$40,000 Surveillance Trailer.

### Revenues

- \$819,271 Increase in Community Corrections Partnership revenue due to changes in accounting and Gun Violence Reduction Program grant revenue.
- \$394,561 Increase in administrative fee repeal backfill revenue.
- \$375,000 Increase in School Resource Officer revenue due to changes in accounting.
- \$100,000 Increase in special event revenue due to changes in accounting.
- (\$67,847) Decrease in public protection grant revenue.

### Operating Transfers In

- \$130,000 Increase in operating transfers in from American Rescue Plan Act (ARPA) to provide support for cameras and site cleanup tied to illegal dumping.
- \$90,000 Increase in operating transfers in from Auto Theft Task Force revenue due to changes in accounting.

### Program Discussion

The 2023-2024 recommended budget for the Special Services Division totals \$18,128,490, which is an increase of \$856,336 from the 2022-2023 adjusted budget.

#### AGNET

The Agriculture, Gang, and Narcotics Enforcement Team (AGNET) investigates agricultural crime, gang crimes, and street-level narcotics crimes. AGNET deploys into teams of experts to investigate real-time (dispatched) and after-the-fact agricultural crimes, street-level narcotics through proactive enforcement, gang crimes attached to major crimes, and vice/undercover operations. AGNET is also called upon to investigate jail escapees, assist Patrol and Investigative Divisions with tactical surveillance and fugitive apprehension, as well as other situations when a force multiplier is needed to assist. The County has experienced an increase in crimes related to human trafficking, prostitution, and illegal gambling. Investigative duties related to these crimes are assigned to this unit.

#### Community-Oriented Policing Unit

The Community-Oriented Policing Unit provides personalized, community-oriented style policing, attends area meetings, facilitates neighborhood watch meetings, and handles calls for service in their assigned micro beat areas. The Sheriff's Office currently deploys eight Community Car Deputies in Country Club, Linden, Lockeford, Morada, Tracy, Woodbridge and East Stockton. Community Cars will be available for additional areas of the County as vacancies in the Unit are filled.

In 2021-2022, the Community-Oriented Policing Unit added two Motor Unit Deputies. The Motor Unit Deputies conduct high-visibility roving patrols on motorcycles and address problem areas in their assigned communities. Motor Units are also called upon to assist Patrol in handling traffic-related calls for service as needed.

Additionally, the Community Car Program manages and supervises the Sheriff's Office School Resource Officers and Airport Deputies. The Sheriff's Office provides School Resource Officers to Lincoln Unified, Linden High School, Lodi Unified, and Mountain House High School. The assigned Deputies interact with students and staff and provide highly-visible patrols. These Deputies work closely with the school districts' intervention programs aimed at at-risk students. These full-time positions are partially funded by their respective school districts.



# 2021614000—Sheriff-Special Services Division

## Law & Justice

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### Airport Patrol

The 2023-2024 proposed budget includes a cost reimbursement from the Airport Enterprise Fund budget (#9230901000) to fund two Deputy Sheriff I-II positions in the amount of \$470,993. In 2022-2023, a second Deputy Sheriff I-II was added to enhance law enforcement services and maintain effective security with increased airport traffic.

Airport Patrol deputies provide law enforcement services at the Stockton Metropolitan Airport. Deputies are responsible for responding to various disturbances, issuing citations, and investigating suspicious activities. Additional duties include responding to intoxicated persons and vehicle tows when necessary. Currently two Deputy Sheriffs are assigned to Airport Security.

### Gun Violence Reduction Team

The California Department of Justice awarded the Sheriff's Office a three-year grant, totaling \$987,072, to reduce the number of prohibited persons from possessing firearms (B-23-42). The 2023-2024 proposed budget includes \$493,536 of grant revenues to fund the cost of a part-time Sergeant, four Deputy Sheriffs, and a part-time Crime Analyst.

### Community Revitalization Unit (CRU)

The CRU addresses multiple quality of life issues to reduce and eliminate illegal encampments, homes, structures, properties that require abatement, graffiti, illegal trash dumps, and abandoned vehicles/vessels.

The CRU's abatement team functions as the lead for the Countywide Encampment Response Team (ERT), whose primary mission is to conduct outreach and evaluate public safety, environmental impacts, and community impact of homeless encampments.

### Strategic Intelligence Unit

The Strategic Intelligence Unit (SIU) provides analytical support to the Department, through detailed workups on subjects and properties, identifying officer safety concerns, associations, and patterns of behavior. The SIU is also responsible for networking with outside agencies and identifying crime series and crime trends, occurring within the Sheriff's Office jurisdiction. The SIU collects, analyzes, organizes, and disseminates pertinent information to executive staff and sworn personnel in the field, who in turn

modify, develop, and deploy effective policing strategies in response to problems and issues in the community. There are currently five allocated full-time Crime Analysts assigned to the SIU and one allocated Supervising Crime Analyst.

The Unit is vital to the Sheriff's Office, providing analytical support to all divisions, and is central to the Sheriff's Office Strategic Plan. The Unit is instrumental in providing intelligence to several specialty units including, but not limited to, the Gang Task Force, AGNET, the Community-Oriented Policing Unit, Investigations, Patrol, Custody and Classification, and SWAT.

The SIU is utilized Department-wide and will eventually build out into a centralized Real Time Crime Center that will provide real-time intelligence to operation resources in the field. The mission of the Real Time Crime Center will be to optimize the use of technologies and resources to provide for a more efficient and effective policing strategy. Such efforts allow for improved operational intelligence and Deputy response, with an emphasis on Officer safety and the community wellbeing. During 2022-2023, the Unit implemented telecommunication analytics software to assist with analyzing cell phone data, social media, cell tower pings, and pen registers. These software analysis tools have assisted the Division with electronic device search warrants and producing comprehensive investigative reports. Additionally, Geoshield, a dashboard application that provides Crime Analysts the ability to monitor vehicle locations, view live on-scene camera streams, view historic crime data, and review calls for service history information was purchased. The Unit will continue to work closely with the Sheriff's Office Information Technology staff to improve dashboard capabilities to provide statistical data for intelligence purposes.

## Supplemental Requests

The Special Services Division is requesting supplemental funding totaling \$324,000 for the following:

### Marked Vehicles (4)

Funding of \$324,000 is requested for four additional marked vehicles assigned to the Special Services Division. Funding is requested to deploy units simultaneously, which is critical for effective enforcement.

The recommended budget has been augmented by \$324,000 to address these requests.

# 2021614000—Sheriff-Special Services Division

## Law & Justice

### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>General</b>					
<i>Arrests</i>	N/A	N/A	N/A	538	565
<i>Calls for Service</i>	N/A	N/A	N/A	20,308	19,293
<i>Citations</i>	N/A	N/A	N/A	782	821
<i>Traffic Stops</i>	N/A	N/A	N/A	2,400	2,520
<i>Probation/Parole Searches</i>	N/A	N/A	N/A	255	268
<i>Special Operations**</i>	42	19	25	48	50
<i>Vehicles Towed</i>	N/A	N/A	N/A	580	638
<i>Towed Vehicle Processed**</i>	N/A	N/A	1,690	1,636	1,800
<i>Warrants</i>	N/A	N/A	N/A	136	143
<b>Agricultural Crimes Cases (AGNET)*</b>					
<i>Equipment Theft</i>	45	82	76	50	48
<i>Livestock Theft</i>	8	6	5	6	6
<b>Community-Oriented Policing Unit</b>					
<i>Community Events</i>	N/A	N/A	0	8	30
<i>Community Meetings</i>	N/A	N/A	41	53	56
<b>Community Revitalization Unit</b>					
<i>Abated Properties**</i>	N/A	N/A	56	104	109
<i>Calls for Service-Homelessness**</i>	N/A	N/A	2,535	3,932	3,735
<i>Homeless Encampment Cleanups</i>	N/A	N/A	45	74	78
<i>Homeless Encampment Maintenance</i>	N/A	N/A	1,447	2,476	2,600
<i>Homeless Individuals Accepting Resources</i>	N/A	N/A	0	4	4
<i>Illegal Dumping Investigations</i>	N/A	N/A	858	1,212	1,333
<b>Strategic Intelligence Unit</b>					
<i>Crime Analysis Support</i>	N/A	N/A	1,010	1,000	1,100

\*Transferred from Detectives

\*\*Transferred from Patrol

N/A= Data not collected

# 2021615000—Sheriff-Mountain House

## Law & Justice

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General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,547,348	\$1,753,493	\$1,975,051	\$1,975,051	\$221,558
Services & Supplies	118,704	190,787	198,997	198,997	8,210
Centrally-Budgeted Expenses	95,214	108,923	129,345	129,345	20,422
Capital Expenditures	0	0	40,650	40,650	40,650
Total Expenditures	\$1,761,266	\$2,053,203	\$2,344,043	\$2,344,043	\$290,840
Expenditure Reimbursements	(7,000)	0	0	0	0
Total Appropriations	\$1,754,266	\$2,053,203	\$2,344,043	\$2,344,043	\$290,840
<b>Earned Revenues By Source</b>					
Charges For Services	\$1,736,949	\$2,053,203	\$2,344,043	\$2,344,043	\$290,840
Total Revenues	\$1,736,949	\$2,053,203	\$2,344,043	\$2,344,043	\$290,840
Net County Cost	\$17,317	\$0	\$0	\$0	\$0
Allocated Positions	8.0	8.0	8.0	8.0	0.0

## Purpose

This budget unit captures costs and reimbursements for the Sheriff's Office to provide contract law enforcement services to the Mountain House Community Services District (MHCS). Patrol services have been provided since 2004 through a Police Protection Services Agreement with costs fully reimbursed by the MHCS.

## Major Budget Changes

### Salaries & Employee Benefits

- \$221,558 Salary and benefits adjustments.

### Services & Supplies

- \$8,210 Increase in law enforcement equipment purchases.

### Centrally-Budgeted Expenses

- \$14,948 Increase in Workers' Compensation insurance costs.

### Capital Expenditures - Equipment

- \$40,650 Motor trailer.

### Revenues

- \$290,840 Increase in reimbursement from MHCS for law enforcement services.

## Program Discussion

The 2023-2024 recommended budget for Sheriff-Mountain House totals \$2,344,043, which is an increase of \$290,840 from the 2022-2023 adjusted budget.

The Mountain House Community Services District (MHCS) has been exploring options for incorporation. A vote is tentatively scheduled for November 2023, with the goal to incorporate in July 2024. In the event MHCS incorporates and requests Sheriff's deputies continue services, a new Memorandum of Understanding will be necessary and brought to the Board for consideration in 2023-2024.

# 2021615000—Sheriff-Mountain House

## Law & Justice

### Workload Data

		<u>Actual</u>		<u>Est./Act.</u>	<u>Projected</u>
	<u>2019-2020</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>
<i>Crime Reports</i>	858	685	716	1,066	1,421
<i>Calls for Service</i>	8,592	7,572	9,456	11,468	12,809
<i>Officer Initiated</i>	3,430	2,754	2,884	4,312	5,782
<i>Citizen Initiated</i>	5,162	4,818	6,572	7,156	9,920
<i>Adult Arrests</i>	59	92	52	34	59
<i>Parking Citations</i>	109	174	102	172	222
<i>Traffic Citations</i>	94	36	130	372	850
<i>Coroner Investigations</i>	15	N/A*	N/A*	N/A*	N/A*

*\*Transferred to the Office of the Medical Examiner July 1, 2020.*

# 2021619000—Sheriff-Animal Services

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$797,488	\$927,184	\$1,046,490	\$1,046,490	\$119,306
Services & Supplies	243,134	356,567	385,230	385,230	28,663
Centrally-Budgeted Expenses	49,714	68,438	137,182	137,182	68,744
Other Charges & Uses	1,051,687	1,438,575	1,438,575	1,438,575	0
Capital Expenditures	19,474	0	0	0	0
Total Expenditures	\$2,161,497	\$2,790,764	\$3,007,477	\$3,007,477	\$216,713
Expenditure Reimbursements	(8,500)	0	0	0	0
Total Appropriations	\$2,152,997	\$2,790,764	\$3,007,477	\$3,007,477	\$216,713
<b>Earned Revenues By Source</b>					
Miscellaneous Revenues	\$35	\$0	\$0	\$0	\$0
Operating Transfers In	5,997	79,827	79,827	79,827	0
Total Revenues	\$6,032	\$79,827	\$79,827	\$79,827	\$0
<b>Net County Cost</b>	\$2,146,965	\$2,710,937	\$2,927,650	\$2,927,650	\$216,713
<b>Allocated Positions</b>	11.0	11.0	11.0	11.0	0.0

## Purpose

The Sheriff's Animal Services Unit protects public health and safety by implementing dog licensing and rabies vaccination programs, responding to complaints regarding dangerous or rabid animals, and removing injured, sick, or dead strays. This Unit also provides assistance with predatory animals, investigates complaints of animal abuse or neglect, and takes appropriate action to deal with other problems associated with the care and control of animals.

## Major Budget Changes

### Salaries & Employee Benefits

- \$119,306 Salary and benefits adjustments.

### Services & Supplies

- \$16,800 Increase in animal rescue costs.
- \$9,235 Increase in small tool costs.

### Centrally-Budgeted Expenses

- \$53,055 Cost Allocation Plan adjustment.

## Program Discussion

The 2023-2024 recommended budget for Animal Services totals \$3,007,477, which is an increase of \$216,713 from the 2022-2023 adjusted budget.

In November 2018, the Board of Supervisors retroactively approved a Memorandum of Understanding (B-18-702) with the City of Stockton for use of its animal shelter. While the previous contract called for the City and County to share costs based on the number of animals for each agency, the new contract called for a flat rate of \$325 per animal up to 3,000 animals and \$525 per animal above 3,000 and an agreed upon annual price increase. The County is currently paying \$395 per animal (up to 3,000).

# 2021619000—Sheriff-Animal Services

## Law & Justice

Based on the increase in pricing in 2018, the 2019-2020 budget added \$780,457 to the animal shelter budget, for a total of \$1,438,575 and remained the same in 2020-2021 through 2022-2023. The 2023-2024 recommended budget for animal shelter services remains at this level.

Due to a continuing effort to reduce costs associated with impounding animals, Animal Services Officers spend additional time identifying owners in an attempt to return stray animals to homes. The 2022-2023 midyear cost projection as of December 31, 2022, was \$2,178,643 or \$612,121 under budget.

## Fund Balance

### Rabies Treatment & Eradication Fund

The Rabies Treatment and Eradication Special Revenue Fund (#20010) receives revenue from dog licenses and fines. Fund proceeds are used to offset costs of enforcing rabies control measures. Annual revenue is approximately \$38,000. As of March 31, 2023, the fund balance was \$303,028. In 2023-2024, \$79,827 is budgeted for Animal Services Officer training and rabies vaccination clinics.

### Workload Data

	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021	2021-2022		
<i>Licenses Sold</i>	2,567	3,028	2,560	2,600	2,689
<i>Animals Impounded</i>	2,556	2,547	1,152	1,200	1,200
<i>Complaints/Calls For Service</i>	7,842	7,309	7,918	7,574	7,660
<i>Notices of Violation</i>	495	385	295	260	359
<i>Citations</i>	67	59	44	50	55
<i>Humane Investigations</i>	739	455	604	612	603
<i>Animal Bites Reported</i>	443	225	172	196	259
<i>Deceased Animals</i>	1,222	1,521	1,035	1,000	1,195
<i>Returned to Owner</i>	829	567	370	350	529
<i>Euthanized</i>	121	104	79	50	80
<i>Medical Clearance Prior to Impound</i>	151	137	142	130	140
<i>Dangerous Dog Notice</i>	36	8	8	10	16
<i>Quarantine</i>	424	164	162	90	210

# 2021620000—Sheriff-Patrol

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
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General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$35,061,452	\$27,504,032	\$30,638,202	\$30,638,202	\$3,134,170
Services & Supplies	3,784,275	3,764,571	5,309,700	5,309,700	1,545,129
Centrally-Budgeted Expenses	3,338,312	4,344,898	4,588,440	4,588,440	243,542
Capital Expenditures	390,140	867,288	156,200	156,200	(711,088)
Operating Transfers Out	0	11,836	0	0	(11,836)
Total Expenditures	\$42,574,179	\$36,492,625	\$40,692,542	\$40,692,542	\$4,199,917
Expenditure Reimbursements	(831,203)	0	0	0	0
Total Appropriations	\$41,742,976	\$36,492,625	\$40,692,542	\$40,692,542	\$4,199,917
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$1,535	\$1,754	\$1,754	\$1,754	\$0
Fines/Forfeitures/Penalties	108,057	94,000	105,400	105,400	11,400
Interest/Rents	1	0	0	0	0
Aid From Other Governments	15,166,670	14,934,517	17,226,878	17,226,878	2,292,361
Charges For Services	480,694	625,019	144,899	144,899	(480,120)
Miscellaneous Revenues	27	8,937	8,937	8,937	0
Operating Transfers In	177,917	138,000	48,000	48,000	(90,000)
Total Revenues	\$15,934,901	\$15,802,227	\$17,535,868	\$17,535,868	\$1,733,641
<b>Net County Cost</b>	\$25,808,075	\$20,690,398	\$23,156,674	\$23,156,674	\$2,466,276
<b>Allocated Positions</b>	170.0	124.0	123.0	123.0	(1.0)
<b>Temporary (Full-Time Equivalent)</b>	7.0	6.3	0.0	0.0	(6.3)
<b>Total Staffing</b>	177.0	130.3	123.0	123.0	(7.3)

## Purpose

The Patrol Division of the Sheriff's Office provides law enforcement services in the unincorporated areas of the County. Deputies respond to calls for service and engage in proactive law enforcement designed to enhance public safety and reduce criminal activity.

The Division also maintains a Critical Incident Management Team covering Special Weapons and Tactics (SWAT), Explosive Ordnance Disposal (EOD), Hostage Negotiations Team (HNT), Mobile Field Forces (MFF), and Unmanned Aircraft System (UAS). This Team is managed within the Patrol Division, but members may be assigned to other divisions. Citizen volunteer units such as the Sheriff's Team of Active Retired Seniors (STARS) complement Division operations.

## Major Budget Changes

### Salaries & Employee Benefits

- \$3,657,310 Salary and benefits adjustments.
- (\$274,766) Transfer Deputy Sheriff I-II to the Cal-MMET budget (#2021609000).
- (\$248,374) Decrease in extra-help costs.

# 2021620000—Sheriff-Patrol

## Law & Justice

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### Services & Supplies

- \$1,239,545 Increase in fleet services costs due to underestimate in transition of the Special Services Division budget (#2021614000).
- \$170,000 Increase in law enforcement equipment costs.
- \$102,086 Increase in Port Security Grant program costs.
- \$21,750 Increase in data wireless costs.

### Centrally-Budgeted Expenses

- \$258,948 Increase in Casualty insurance costs.
- \$126,851 Increase in radio maintenance costs.
- \$20,838 Increase in data processing charges.
- (\$134,781) Decrease in Workers' Compensation insurance costs.
- (\$33,901) Decrease in rents and leases of automation equipment.

### Capital Expenditures - Equipment

- \$85,550 Vehicle.
- \$70,650 Trailer.

### Revenues

- \$2,170,994 Increase in Proposition 172 funding.
- \$394,561 Increase in Assembly Bill 199 backfill revenue.
- (\$364,656) Decrease in School Resource Officer revenue due to transfer of positions.
- (\$235,450) Decrease in Community Corrections Partnership revenue due to changes in accounting.
- (\$100,000) Decrease in special event revenue due to changes in accounting.
- (\$38,000) Decrease in Federal revenue due to changes in accounting.

### Operating Transfers In

- (\$90,000) Decrease in operating transfers in from Auto Theft Task Force revenue due to changes in accounting.

## Program Discussion

The 2023-2024 recommended budget for the Patrol Division totals \$40,692,542, which is an increase of \$4,199,917 from the 2022-2023 adjusted budget.

In 2022-2023, the Special Services Division became its own separate budget (#2021614000) from the Patrol budget and 48 positions were transferred from Patrol to the Special Services Division. Additionally, three programs from Patrol were transferred to the Special Services Division: Community Car Program, Community Revitalization Unit (CRU), and Strategic Intelligence Unit. The Patrol Division has retained its primary duties of responding to calls for service, engaging in proactive law enforcement work designed to enhance public safety, reducing criminal activity by catching offenders, and preventing illegal activity through increased presence within the County.

Midyear in 2022-2023, one additional vacant Deputy Sheriff I-II position was transferred from Patrol to the Administration budget (#2021645000).

The Patrol Division provides law enforcement services to the unincorporated areas of San Joaquin County, with a service population of approximately 143,561. The Deputy Sheriffs assigned to Patrol work on one of eight Patrol teams disbursed to provide overlapping shift coverage throughout the County based upon eight geographical beat areas.

### Field Training Program

The Patrol Division Field Training Program consists of a seven-month period during which trainees receive one-on-one and group instruction on how to perform the job duties of a Deputy Sheriff. Their training begins with one month of administrative assignments in the facility, then six months of in-field training on Patrol. Trainees receive daily evaluations of performance and progression within the program. The Patrol Division also utilizes Field Training Officers to operate a Patrol Re-orientation Program for those Deputy Sheriffs reassigned to the Patrol Division after assignment elsewhere for more than one year. The Field Training Program is supervised by two Deputy Training Sergeants and is managed by a Sheriff's Lieutenant. In 2022-2023, more than 23 Deputies completed the Field Training Program.

In 2023-2024, Patrol estimates that 20 to 30 Deputies will be trained in the Program.



# 2021620000—Sheriff-Patrol

## Law & Justice

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### Unmanned Aircraft Systems

The Sheriff's Office piloted a drones-equipped Unmanned Aircraft Systems (UAS) Unit to better equip Patrol Deputies and special units to effectuate their work. Previously, the Unit operated within the Explosive Ordnance Detail (EOD) team. However, with the increased need for aerial assistance, the Unit began operating independently of the EOD team.

Since implementing the program, nine Deputy Sheriffs and two Sergeants have become licensed UAS pilots through the Federal Aviation Administration (FAA). Licensed UAS pilots are recertified on a biannual basis through the FAA and are required to participate in an internal recertification program through the Sheriff's Office.

The program deploys unmanned aerial units on a regular basis to respond to calls for service and critical incidents throughout the County. The UAS Unit has provided assistance with search and rescue operations, crime scene reconstruction, intelligence gathering, and SWAT missions.

### STARS

The Sheriff's Team of Active Retired Seniors (STARS) is a mostly volunteer unit acting as a support unit to Patrol and Investigations Divisions. STARS perform patrol of service areas, make vacation and abatement checks, work in numerous special community events, conduct fingerprint services for grade school children, and assist in visual presence representing the Sheriff's Office. STARS personnel also assist in the Sheriff's Office fleet of vehicles utilized to respond to long-term or large-scale events, including the Mobile Law Enforcement Command center (MLEC). STARS members routinely volunteer approximately 44,000 hours, patrolling 125,000 miles, and participate in more than 75 community events each year.

### Canine Unit

The Canine Unit was established in March 1991 with one canine and handler. The Canine Unit has evolved to 13 handlers with 13 canines. Ten canine teams are strategically scheduled for around-the-clock coverage assigned to eight patrol teams. At full staffing, the Unit

covers a 24-hour day, with one canine for each day and graveyard shift, and two canines for each swing shift.

During 2022-2023, attrition impacted operations for the Canine Unit as canines had to retire due to age or injury. Additionally, one canine was killed in the line of duty during an apprehension of a burglary suspect in response to an interagency aid request from the Tracy Police Department.

One Lieutenant manages the Canine Unit, with one Sergeant acting as supervisor. The Sergeant also assists as a trainer and maintains and orders equipment as needed. The Canine Unit has two Field Training Officers who conduct ongoing training throughout the year to certified teams. Field Training Officers also provide training to new handlers and dogs for certification. All canine handlers and their partners certify bi-annually and are utilized by Patrol daily for building searches, vehicle searches, and numerous incidents that may pose an officer safety situation.

## Supplemental Requests

Funding is requested in the amount of \$226,200 for the following supplemental requests:

### *License Plate Readers Subscription (28)*

Funding is requested in the amount of \$70,000 to purchase 28 Flock Access license plate reader camera annual subscriptions. Flock Access cameras assist Deputies and specialized units with suspect apprehension and recovering stolen vehicles. Flock Access has become an important investigative tool as several law enforcement agencies share and utilize Flock Access data.

### *Mounted Patrol Unit Truck and Trailer*

Funding is requested in the amount of \$156,200 for a truck and trailer equipped for transporting horses and equipment to and from calls for service that require mounted patrol Deputies.

The recommended budget has been augmented by \$226,200 to address these requests.

# 2021620000—Sheriff-Patrol

## Law & Justice

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>Service Population</i>	155,699	155,508	159,170	159,170	159,949
<i>Documented Calls for Service</i>	126,370	126,297	124,286	123,567	122,525
<i>Officer Initiated</i>	32,344	31,022	31,431	30,685	30,230
<i>Citizen Initiated</i>	94,026	95,275	92,855	92,881	92,296
<i>SWAT/Hostage Negotiation</i>	62	92	112	96	100
<i>Trainees In Field Training</i>	27	21	25	23	23
<i>Canine Searches</i>	315	305	219	394	306
<i>Missing Person Calls</i>	835	1,496	2,177	2,845	3,516
<i>Adult Arrests</i>	5,996	6,081	8,182	8,939	10,032
<i>Juvenile Arrests</i>	141	160	293	350	426
<i>Towed Vehicles Processed</i>	396	211	1,699	1,162	1,445
<i>Abated Properties</i>	60	65	41	70	80
<i>Coroner Investigations*</i>	2,215	3,391	3,049	1,437	*
<i>Documented Reports</i>	16,453	17,536	19,376	20,711	22,173
<i>Supplemental Reports</i>	10,395	11,489	11,974	12,865	13,655
<i>Community Meetings</i>	28	60	**	**	**
<i>Community Car Program</i>					
<i>Special Operations</i>	42	19	**	**	**
<i>Calls for Service-Homelessness</i>	2,701	1,803	**	**	**

\*Transferred to the Office of the Medical Examiner July 1, 2020, however, Deputy Sheriffs continued to respond to and investigate Coroner calls throughout 2022-2023 during the transition.

\*\*Transferred to Special Services Division.

# 2021622000—Sheriff-Communications

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,206,517	\$4,995,138	\$5,607,649	\$5,607,649	\$612,511
Services & Supplies	98,977	168,312	168,312	168,312	0
Centrally-Budgeted Expenses	200,765	338,078	448,423	448,423	110,345
Capital Expenditures	77,036	60,000	0	0	(60,000)
Total Expenditures	\$4,583,295	\$5,561,528	\$6,224,384	\$6,224,384	\$662,856
Expenditure Reimbursements	(57,838)	(198,546)	(237,185)	(237,185)	(38,639)
Total Appropriations	\$4,525,457	\$5,362,982	\$5,987,199	\$5,987,199	\$624,217
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$4,094,694	\$4,097,395	\$4,636,550	\$4,636,550	\$539,155
Charges For Services	350,820	100,465	0	0	(100,465)
Total Revenues	\$4,445,514	\$4,197,860	\$4,636,550	\$4,636,550	\$438,690
<b>Net County Cost</b>	\$79,943	\$1,165,122	\$1,350,649	\$1,350,649	\$185,527
<b>Allocated Positions</b>	35.0	40.0	40.0	40.0	0.0

## Purpose

The Communications Division of the Sheriff's Office is responsible for radio dispatching Patrol and Animal Services, and providing investigative support to field forces and allied agencies, including research and data entry access to various Criminal Justice Information Systems. The Communications Center handles all incoming phone traffic, both emergency and non-emergency.

The Communications Center is the Public Safety Answering Point (PSAP) for all emergency 911 calls originating in the unincorporated County areas. Emergency 911 calls from any phone outside a city limit are automatically routed to the Sheriff's Communications Center, with calls requiring emergency medical services and/or fire response forwarded to the appropriate agency. The Communications Center also serves as the alternate answering point for other PSAPs in the County during a crisis. The Communications Center is staffed 24 hours a day, 7 days per week.

## Major Budget Changes

### Salaries & Employee Benefits

- \$612,511 Salary and benefits adjustments.

### Cost Reimbursements

- \$38,639 Increase in reimbursement from the Probation-Adult budget (#2022702000) for dispatching service costs.

### Centrally-Budgeted Expenses

- \$51,644 Increase in Workers' Compensation insurance costs.
- \$30,483 Increase in radio maintenance costs.
- \$13,758 Cost Allocation Plan adjustment.

### Revenues

- \$599,155 Increase in Proposition 172 funding.
- (\$100,465) Decrease in reimbursements from the City of Lathrop due to end of contract.
- (\$60,000) Decrease in State funding for one-time purchase of high frequency radios.

# 2021622000—Sheriff-Communications

## Law & Justice

### Program Discussion

The 2023-2024 recommended budget for Communications totals \$6,224,384, which is an increase of \$662,856 from the 2022-2023 adjusted budget.

The Sheriff’s Office Communications Division began providing dispatching services to the Probation Department for unincorporated areas of the County during 2022-2023. Beginning in 2023-2024, dispatching services will be expanded Countywide to include the incorporated areas. In order to facilitate the increase in workload, two Communications Dispatchers were added in 2022-2023. Additionally, beginning in 2023-2024, Sheriff’s Information Technology staff will begin maintaining the Probation

Department’s mobile data computers (MDC). The 2023-2024 proposed budget includes a cost reimbursement of \$237,185 from the Probation Department for dispatching services and associated costs.

In May 2020, the Board of Supervisors approved the Recruitment and Retention Program (B-20-250), which approved a signing and referral bonus for the Communications Dispatcher series job classification. The Recruitment and Retention Program was extended through June 2024 (B-22-286). Prior to the implementation of the program, the Communications Dispatcher series was staffed at 82%. As of March 2023, 91% of the positions were filled. The Division will continue to work closely with the Professional Standards Division to fill all vacancies.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
911 Calls Received	52,584	53,247	54,349	59,134	61,539
Dispatch System Entries	168,130	164,514	176,842	178,308	188,311
Incoming Calls (911 & Non-Emergency)	201,106	256,857	205,514	196,948	215,106
Outbound Calls	59,104	62,218	62,700	64,188	65,985

# 2021626000—Sheriff-Detectives

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$10,777,463	\$11,101,865	\$11,264,137	\$11,264,137	\$162,272
Services & Supplies	953,924	1,314,931	1,390,510	1,390,510	75,579
Centrally-Budgeted Expenses	796,180	951,440	1,243,621	1,243,621	292,181
Capital Expenditures	174,300	138,152	357,121	357,121	218,969
Total Expenditures	\$12,701,867	\$13,506,388	\$14,255,389	\$14,255,389	\$749,001
Expenditure Reimbursements	(177,467)	(126,967)	(126,967)	(126,967)	0
Total Appropriations	\$12,524,400	\$13,379,421	\$14,128,422	\$14,128,422	\$749,001
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$3,971,212	\$4,129,171	\$4,313,182	\$4,313,182	\$184,011
Charges For Services	80,589	88,000	60,000	60,000	(28,000)
Miscellaneous Revenues	2,975	0	0	0	0
Operating Transfers In	1,350	23,400	23,400	23,400	0
Total Revenues	\$4,056,126	\$4,240,571	\$4,396,582	\$4,396,582	\$156,011
<b>Net County Cost</b>	\$8,468,274	\$9,138,850	\$9,731,840	\$9,731,840	\$592,990
<b>Allocated Positions</b>	52.0	56.0	53.0	53.0	(3.0)
<b>Temporary (Full-Time Equivalent)</b>	0.3	0.3	0.3	0.3	0.0
<b>Total Staffing</b>	52.3	56.3	53.3	53.3	(3.0)

## Purpose

The Detectives Division of the Sheriff's Office provides law enforcement investigative services in the unincorporated areas of the County, as well as technical evidence services to the Sheriff's Office and other agencies. Prior to 2022-2023, this narrative included the Detectives budget (#2021626000) and the Agricultural, Gangs, and Narcotics Enforcement Team (AGNET) (#2021614000) budgets.

In 2022-2023, the AGNET budget was transferred and renamed to the Special Services Division budget (#2021614000).

In 2023-2024, staffing and associated costs for the Metropolitan Narcotics Task Force was transferred to the California Multi-Jurisdictional Methamphetamine Enforcement Team (Cal-MMET) budget (#2021609000).

The following Units are assigned to the Detective's budget:

- **Child Abuse and Sexual Assault Unit** – Investigates cases involving rape, sexual assaults, child/elder abuse, child neglect, molestation, abduction, and missing or runaway children. The Unit carries the responsibility for the application of Megan's Law, dealing with the identification and mandated registration of known sex offenders.
- **Persons Unit** – Investigates homicides, suspicious deaths, robberies, assaults, domestic violence, kidnappings, adult missing persons, officer-involved shooting incidents, and protocol case investigations.
- **Property Unit** – Investigates burglary, property theft, identity theft, arson, and fraud.

# 2021626000—Sheriff-Detectives

## Law & Justice

- **Technical Services Unit** – Provides investigative support in the form of photographs, evidence collection and storage, fingerprinting of crime scenes and applicants, processing of blood and chemical evidence, processing of latent prints, and assistance to other law enforcement agencies.
- **Cold Case Unit** – Investigates cold case homicides, missing persons, sexual assault cases, special circumstance cases, and participates in the San Joaquin County Cold Case Task Force.

## Major Budget Changes

### Salaries & Employee Benefits

- \$1,420,644 Salary and benefits adjustments.
- \$212,001 Add a Sergeant.
- \$792,310 Add five Deputy Sheriffs I-II.
- (\$2,159,683) Transfer nine positions to the Cal-MMET budget (#2021609000).
- (\$103,000) Decrease in overtime costs.

### Services & Supplies

- \$123,337 Increase in forensic service costs.
- \$50,600 Increase in annual software subscription costs.
- \$48,035 Increase in law enforcement equipment costs.
- \$41,350 Increase in technology costs.
- \$39,375 Increase in travel costs.
- (\$208,080) Decrease in investigative service costs due to changes in accounting.

### Centrally-Budgeted Expenses

- \$218,363 Increase in Workers' Compensation and Casualty insurance costs.
- \$62,058 Increase in radio maintenance costs.

### Capital Expenditures - Equipment

- \$216,000 Vehicles (6).
- \$59,100 Mobile radios (6).
- \$41,400 Portable radios (6).

### Capital Expenditures - Structures and Improvements

- \$17,783 Office renovations.
- \$22,838 Interview rooms renovation.

### Revenues

- \$559,630 Increase in Proposition 172 funding.
- (\$279,940) Decrease in drug enforcement grant revenue due to changes in accounting.
- (\$95,679) Decrease in Federal funding due to changes in accounting.
- (\$28,000) Decrease in Lathrop law enforcement funding due to ending of contract.

## Program Discussion

The 2023-2024 recommended budget for the Detectives Division totals \$14,255,389, which is an increase of \$749,001 from the 2022-2023 adjusted budget.

In 2023-2024, the Department is adding six new positions to the Detectives Division.

Proposed Added Positions	
Position	Quantity
Sergeant	1
Deputy Sheriff I-II	5
<b>Total</b>	<b>6</b>

### Metropolitan Narcotics Task Force

Prior to 2023-2024, the Detectives budget included staffing, grant revenues, and expenditures associated with the Metropolitan Narcotics Task Force. These costs have been transferred to the California Multi-Jurisdictional Methamphetamine Enforcement Team (Cal-MMET) budget, including nine positions. The nine positions transferring in 2023-2024 are one Lieutenant, one Sergeant, five Deputy Sheriffs I-II, one Senior Office Assistant, and one Office Assistant Specialist. Additional details regarding Cal-MMET are discussed in the Sheriff-Cal-MMET budget narrative (#2021609000).

### Cold Case Unit

The Sheriff's Office participates in the San Joaquin County Cold Case Task Force and has spearheaded the development of a cold case matrix of data points, which is shared with all law enforcement agencies within the County. The budget

# 2021626000—Sheriff-Detectives

## Law & Justice

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includes \$23,400 funded by Proposition 69 funds to hire outside laboratories to process degraded DNA samples that the Department of Justice is unable to process due to the quality of the samples. The budget also includes funding for genealogy and forensic analysis services to aid in research of unidentified victims and suspects.

### Property Unit

The Property Unit of the Detectives Division consists of a Sergeant and four Deputy Sheriffs assigned to investigate property crimes. In 2021-2022, the Unit took in 6,635 property cases. This represents an increase of 1,720 cases from 2020-2021. Due to limited workforce, only a fraction of cases were able to be investigated.

### Child Abuse and Sexual Assault (CASA) Unit

The CASA Unit currently consists of one Sergeant and six Deputy Sheriffs. In 2021-2022, the Unit received 6,685 cases, an increase of 873 cases from 2020-2021. Human trafficking cases rose from 129 cases in 2020-2021 to 149 in 2021-2022. The strain on existing resources has created a need for advanced investigative tools to assist with investigations and reduce the manpower needed to recover digital data.

## Supplemental Requests

Funding is requested in the amount of \$1,543,173 for the following supplemental requests:

### *Sergeant*

Funding is requested in the amount of \$275,112 for a Sergeant, and associated equipment costs, for the Technical Services Unit.

A Sergeant is needed to supervise 15 Evidence Technicians and part-time staff.

### *Deputy Sheriff I-II (Technology Crimes Detective)*

Funding is requested in the amount of \$227,098 for one Deputy Sheriff I-II, and associated equipment costs, for the Technology Crimes assignment.

The Deputy Sheriff I-II position is needed due to the high volume of technology crimes. Technology Crimes Detectives investigate technology crimes, which include the examination of phones, computers, and other digital equipment.

### *Deputy Sheriff I-II (Human Trafficking Detective)*

Funding is requested in the amount of \$227,098 for one Deputy Sheriff I-II, and associated equipment costs, for the Human Trafficking assignment.

The Deputy Sheriff I-II position is needed due to the increased volume of human trafficking cases that occur. A full-time Human Trafficking Detective will allow for more thorough investigations of human trafficking cases.

### *Deputy Sheriff I-II (Homicide/Robbery Detectives) (3)*

Funding is requested in the amount of \$681,294 for three Deputy Sheriffs I-II, and associated equipment costs, for homicides and robberies.

The three Deputy Sheriff I-II positions are needed due to the increased volume of robberies and violent crimes cases that occur. Persons Unit Detectives investigate robberies, physical assaults, and firearms-related cases.

### *GrayKey Subscription*

Funding is requested in the amount of \$50,600 for the renewal of the yearly subscription for forensic cellular phone extraction. GrayKey will continue to allow Detectives the ability to bypass cellular phone passcodes during investigations.

### *Pole Camera*

Funding is requested in the amount of \$26,350 for the purchase of a pole camera. This purchase will allow for covert surveillance of locations and persons of interest related to criminal investigations.

### *Berla Forensics*

Funding is requested in the amount of \$15,000 for the purchase of Berla vehicle data extraction tools. This purchase will be used by Detectives to uncover critical information during an investigation.

### *Office Renovations/First Floor Interview Rooms/Second Floor Interview Rooms*

Funding is requested in the amount of \$40,621 for the reconfiguration of a new office and renovations, and the refurbishing of the first and second floor interview rooms. This would allow for more adequate office space for staff, accommodate new recording equipment for detectives to conduct interviews, and allow for a safe, comfortable place for crime victims to be interviewed.

The recommended budget has been augmented by \$1,543,173 to address these requests.

# 2021626000—Sheriff-Detectives

## Law & Justice

Workload Data					
	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Technical Services/Work Orders</b>	14,882	15,368	11,333	14,406	15,846
<b>Technical Services/Field Calls</b>	3,691	3,358	3,286	2,922	3,214
<b>Child Abuse/Sexual Assault Cases</b>					
<i>Human Trafficking</i>	68	129	149	186	115
<i>Sex Offender Registration</i>	27	48	29	22	34
<i>Missing Persons</i>	1,058	1,600	2,283	1,624	1,647
<i>Other Child Abuse/Sexual Assault Crimes</i>	2,340	4,035	4,224	2,770	3,533
<b>Total</b>	<b>3,493</b>	<b>5,812</b>	<b>6,685</b>	<b>4,602</b>	<b>5,329</b>
<b>Property Cases Received</b>					
<i>Identity Theft</i>	490	563	1,438	1,443	1,477
<i>Other Property Crimes</i>	4,117	4,352	5,197	6,508	5,311
<b>Total</b>	<b>4,607</b>	<b>4,915</b>	<b>6,635</b>	<b>7,951</b>	<b>6,788</b>
<b>Persons Cases Received</b>					
<i>Homicide</i>	13	9	17	12	13
<i>Robbery</i>	180	120	204	148	168
<i>Other Persons Crimes</i>	1,235	1,332	1,210	1,308	1,258
<b>Total</b>	<b>1,428</b>	<b>1,461</b>	<b>1,431</b>	<b>1,468</b>	<b>1,439</b>
<b>Cold Cases</b>					
<i>Homicides Identified/Triaged</i>	196	187	176	166	166
<i>Homicides Investigated</i>	12	37	36	36	36
<i>Missing Persons Identified/Triaged</i>	47	36	34	34	34
<i>Missing Persons Investigated</i>	10	12	9	10	10
<i>Sexual Assaults Identified/Triaged</i>	99	104	86	86	86
<i>Sexual Assaults Investigated</i>	0	104	18	15	15
<i>Special Investigations</i>	10	2	7	6	6
<b>Metro Narcotics Task Force Investigations*</b>	203	247	N/A	N/A	N/A
<b>Narcotics Tips Received*</b>	178	198	N/A	N/A	N/A
<b>No Case Narcotics*</b>	89	73	N/A	N/A	N/A
<b>Narcotics Arrests*</b>	192	235	N/A	N/A	N/A
<b>Narcotics-Weapons Seized*</b>	102	137	N/A	N/A	N/A
*Transferred to the Cal-MMET budget (#2021609000) in 2023-2024.					



# 2021628000—Sheriff-Records

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,237,860	\$5,039,471	\$5,414,680	\$5,414,680	\$375,209
Services & Supplies	62,951	77,512	77,509	77,509	(3)
Centrally-Budgeted Expenses	562,288	575,991	589,446	589,446	13,455
Capital Expenditures	22,749	66,583	0	0	(66,583)
Total Expenditures	\$4,885,848	\$5,759,557	\$6,081,635	\$6,081,635	\$322,078
Expenditure Reimbursements	(48,500)	0	0	0	0
Total Appropriations	\$4,837,348	\$5,759,557	\$6,081,635	\$6,081,635	\$322,078
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$4,382,007	\$3,970,744	\$4,562,049	\$4,562,049	\$591,305
Charges For Services	481,364	113,416	67,458	67,458	(45,958)
Miscellaneous Revenues	405	383	383	383	0
Operating Transfers In	87,266	0	0	0	0
Total Revenues	\$4,951,042	\$4,084,543	\$4,629,890	\$4,629,890	\$545,347
<b>Net County Cost</b>	<b>(\$113,694)</b>	<b>\$1,675,014</b>	<b>\$1,451,745</b>	<b>\$1,451,745</b>	<b>(\$223,269)</b>
<b>Allocated Positions</b>	<b>54.0</b>	<b>54.0</b>	<b>54.0</b>	<b>54.0</b>	<b>0.0</b>
<b>Temporary (Full-Time Equivalent)</b>	<b>2.0</b>	<b>1.9</b>	<b>1.7</b>	<b>1.7</b>	<b>(0.2)</b>
<b>Total Staffing</b>	<b>56.0</b>	<b>55.9</b>	<b>55.7</b>	<b>55.7</b>	<b>(0.2)</b>

## Purpose

The Records Division of the Sheriff's Office performs specialized criminal and jail inmate recordkeeping functions. The Division consists of two primary areas:

- **Criminal Records** – Functions involve processing, maintenance, and dissemination of law enforcement records such as crime reports, citations, warrants, subpoenas, restraining orders, and court-ordered records expungements, as well as maintenance of databases used for inquiry and submission of crime statistics to State and Federal agencies.
- **Custody Records** – Maintains and updates records related to inmates in custody, including court appearances, sentences, court orders, bail bonds, bookings, citations, and releases. Also provides customer assistance to the public regarding inmate and custodial operational procedures.

## Major Budget Changes

### Salaries & Employee Benefits

- \$375,209 Salary and benefits adjustments.

### Centrally-Budgeted Expenses

- \$31,561 Increase in Workers' Compensation insurance costs.
- (\$16,543) Decrease in data processing charges.
- (\$15,380) Cost Allocation Plan adjustment.

# 2021628000—Sheriff-Records

## Law & Justice

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### Revenues

- \$591,305 Increase in Proposition 172 funding.
- (\$45,958) Decrease in revenues for Lathrop services due to end of agreement.

### Program Discussion

The 2023-2024 recommended budget for the Records Division totals \$6,081,635, which is an increase of \$322,078 from the 2022-2023 adjusted budget.

#### Records Division

The Records Division is split into two distinct functional areas of responsibility providing services to the Sheriff's Office, Operations, and Custody:

- **Records-Operations** – provides service to the Patrol functions of the Sheriff's Office related to typing of documented reports, Control 5 radio requests for information, restraining orders, warrants, ID/Arrest Control, Property Data Control, and reporting of Federal National Incident-Based Reporting System (NIBRS) and State of California Incident-Based Reporting System (CIBRS) information (State and Federal mandates).
- **Records-Custody** – provides service to the Custody functions of the Sheriff's Office related to jail information, court document processing, releases, and warrant pick-ups.

### Radio Communications (Control 5)

Control 5's Office Assistant Specialists primarily respond to radio requests from officers in the field seeking criminal records-related information. The Specialists provide Deputy Sheriffs with information on warrants, missing persons, restraining orders, probation/parole status, and stolen property. The Specialists are responsible for entering time-sensitive data, such as emergency protective orders, into multiple law enforcement databases, including the California Law Enforcement Telecommunications System.

The California Department of Corrections and Rehabilitation (CDCR) allocated \$6,287,759 of unbudgeted revenues, for 2020-2021 and 2021-2022, to the Sheriff's Office for housing inmates sentenced to State prison but remained in San Joaquin County custody due to a halt on inmate transfers. On April 19, 2022, the Board of Supervisors approved (B-22-204) the use of the CDCR funds for the purchase of new workstations and phone systems for Control 5 staff. The workstations were installed during 2022-2023 and the phone systems are tentatively scheduled for installation in June 2023.

In 2021-2022, Control 5 received approval for the installation of a new radio system comparable to the system used by the Communications Division. This project, managed by the Information Systems Division, was put on hold due to a delay in equipment availability. However, as of March 2023, the equipment necessary for completion is in the shipping process.

# 2021628000—Sheriff-Records

## Law & Justice

### Workload Data

	<u>Actual</u>			<b>Est./Act.</b>	<b>Projected</b>
	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>2023-2024</b>
<b>Records-Criminal</b>					
<i>Restraining Orders</i>	759	796	910	998	1,048
<i>Documented Reports, Number of</i>	19,880	20,460	18,668	20,446	21,468
<i>Documented Reports, Pages Typed</i>	87,718	77,282	73,704	77,444	81,316
<i>Documented Reports Sold</i>	2,759	1,761	2,150	1,630	1,711
<i>Citations Processed</i>	1,589	1,668	2,088	1,692	1,777
<i>Subpoena-Production of Evidence</i>	76	40	27	56	59
<i>Repossessions</i>	381	325	319	316	331
<i>Public Records Act Requests</i>	44	75	65	72	76
<i>Warrant Checks</i>	35,096	24,721	22,386	19,770	20,759
<i>Warrant Hits</i>	13,748	6,359	6,934	6,422	6,743
<b>Records-Custody</b>					
<i>Jail Incarcerations</i>	24,498	17,705	18,077	17,410	18,364
<i>Jail Bookings Processed</i>	32,318	28,870	28,725	27,280	28,745
<i>Court Cap Inmate Releases</i>	531	524	1,305	1,252	1,279
<i>Bail Bonds Processed</i>	1,754	786	1,511	1,348	1,415
<i>Stay to Reports Processed</i>	5,590	2,541	5,620	3,992	4,192
<i>State Prison Notifications</i>	742	399	865	816	857
<i>State Hospital Notifications</i>	127	62	128	108	102

# 2021635000—Sheriff-Civil

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,779,993	\$2,082,849	\$2,415,267	\$2,415,267	\$332,418
Services & Supplies	274,337	339,237	337,370	337,370	(1,867)
Centrally-Budgeted Expenses	173,017	195,860	165,016	165,016	(30,844)
Capital Expenditures	0	0	65,648	65,648	65,648
Total Expenditures	\$2,227,347	\$2,617,946	\$2,983,301	\$2,983,301	\$365,355
Expenditure Reimbursements	(10,000)	0	0	0	0
Total Appropriations	\$2,217,347	\$2,617,946	\$2,983,301	\$2,983,301	\$365,355
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$449,913	\$443,497	\$509,619	\$509,619	\$66,122
Charges For Services	231,801	840,711	964,006	964,006	123,295
Miscellaneous Revenues	10,748	0	0	0	0
Total Revenues	\$692,462	\$1,284,208	\$1,473,625	\$1,473,625	\$189,417
<b>Net County Cost</b>	\$1,524,885	\$1,333,738	\$1,509,676	\$1,509,676	\$175,938
<b>Allocated Positions</b>	15.0	15.0	15.0	15.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	0.8	0.7	0.6	0.6	(0.1)
<b>Total Staffing</b>	15.8	15.7	15.6	15.6	(0.1)

## Purpose

The Civil Division of the Sheriff's Office provides process and legal notice service for the courts. Other responsibilities include enforcing Writs of Possession (evictions) and Writs of Execution (money judgments) by seizure and sale of property. The Division maintains trust funds for seizure of property, makes appropriate disbursements to litigants, and provides an accounting of all transactions to the County Auditor-Controller. Fees charged by the Civil Division are legislated by the State each January.

## Major Budget Changes

### Salaries & Employee Benefits

- \$332,418 Salary and benefits adjustments.

### Centrally-Budgeted Expenses

- \$14,890 Increase in Workers' Compensation insurance costs.
- (\$51,898) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$65,648 Vehicle.

### Revenues

- \$123,295 Increase in reimbursement from Civil Process Fee Fund.
- \$66,122 Increase in Proposition 172 funding.

# **2021635000—Sheriff-Civil**

## **Law & Justice**

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### **Program Discussion**

The 2023-2024 recommended budget for the Civil Division totals \$2,983,301, which is an increase of \$365,355 from the 2022-2023 adjusted budget.

During 2019-2020, the replacement of the Civil Division software system was completed. Subsequently, the Division began the implementation of an additional module, which offers e-file access to the public, allowing for services to be initiated online. During the 2022-2023 fiscal year, the e-file module went live. This has allowed for faster processing times of eviction service, bank levy, and withholding order requests, while minimizing calculation errors. During 2023-2024, the Division will focus on staff training and offering the e-file module to the public.

Civil Division revenues were impacted by the COVID-19 pandemic as the number of services provided began to decline in 2019-2020 and in subsequent fiscal years. The Division experienced a 45% decrease in revenue from fiscal year 2018-2019 (pre-COVID-19) to 2021-2022. This includes the impact of a Statewide emergency order for a temporary moratorium on evictions between March 2020 and January 2021. Additional restrictions were placed on evictions limiting the circumstances of evictions and foreclosures, resulting in a significant decrease in eviction services. Since the moratorium was lifted in 2021-2022, revenues were expected to be at pre-COVID-19 levels during fiscal year 2022-2023. Civil revenues are not yet at pre-COVID-19 levels, although they continue to rise.

The Civil Division is currently working to fill a vacant Senior Social Worker position. This position aims to have a positive impact on service delivery by providing affected families with resources and information prior to eviction, in an effort to assist with relocation. This is expected to decrease opposition and negative law enforcement contact, while increasing public and officer safety.

### **Fund Balance**

#### **Civil Process Fee Fund**

A processing fee is assessed for each disbursement of money collected under a writ of attachment, execution, possession, or sale and must be kept in the Civil Process Fee General Fund Special Account (#11217) to supplement the cost of equipment, maintenance, and civil process operations. As of March 31, 2023, the fund balance was \$735,413. A total of \$589,006 is designated for use in the 2023-2024 recommended budget.

#### **Civil Automated Fee Fund**

A portion of fees collected by the Civil Division is required to be placed in the Civil Automated General Fund Special Account (#11218) for the purchase and maintenance of automated systems or other equipment supporting Civil Division functions. As of March 31 2023, the fund balance was \$235,205. A total of \$100,000 of combined new revenue and fund balance is designated for use in the 2023-2024 recommended budget.

# 2021635000—Sheriff-Civil

## Law & Justice

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Earning Withholding Orders</b>					
<i>Unsuccessful attempts</i>	216	312	387	392	451
<i>Successful completions</i>	882	830	1,095	946	938
<b>Evictions</b>					
<i>Unsuccessful attempts</i>	39	12	39	156	195
<i>Successful completions</i>	2,401	731	1,578	2,804	2,938
<b>Bank Levies</b>					
<i>Unsuccessful attempts</i>	9	16	12	28	16
<i>Successful completions</i>	515	211	159	278	291
<b>Keepers/Till Tap</b>					
<i>Unsuccessful attempts</i>	2	15	2	2	5
<i>Successful completions</i>	13	8	7	4	8
<b>Bench Warrants</b>					
<i>Unsuccessful attempts</i>	24	7	12	22	16
<i>Successful completions</i>	38	16	24	22	25
<b>Subpoena</b>					
<i>Unsuccessful attempts</i>	46	453	27	18	136
<i>Successful completions</i>	59	407	29	12	127
<b>Protection Orders</b>					
<i>Unsuccessful attempts</i>	1,287	1,237	1,610	1,562	1,424
<i>Successful completions</i>	1,350	1,280	1,558	1,684	1,468
<b>Real/Personal Property</b>	3	57	38	60	40
<b>Other Types of Service</b>					
<i>Unsuccessful attempts</i>	1,802	762	1,495	1,958	1,504
<i>Successful completions</i>	1,391	666	1,383	1,598	1,260

# 2021645000—Sheriff-Administration/Support Services

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$9,893,245	\$10,643,344	\$11,290,715	\$11,290,715	\$647,371
Services & Supplies	1,984,898	3,673,294	4,692,946	4,692,946	1,019,652
Centrally-Budgeted Expenses	2,051,721	2,641,654	3,140,882	3,140,882	499,228
Capital Expenditures	0	107,226	1,383,800	1,383,800	1,276,574
Total Expenditures	\$13,929,864	\$17,065,518	\$20,508,343	\$20,508,343	\$3,442,825
Expenditure Reimbursements	(89,947)	0	0	0	0
Total Appropriations	\$13,839,917	\$17,065,518	\$20,508,343	\$20,508,343	\$3,442,825
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$115,577	\$118,250	\$125,000	\$125,000	\$6,750
Aid From Other Governments	2,654,719	2,810,961	3,069,661	3,069,661	258,700
Charges For Services	1,313,045	148,242	141,000	141,000	(7,242)
Miscellaneous Revenues	22,944	0	0	0	0
Operating Transfers In	188,226	206,544	237,240	237,240	30,696
Total Revenues	\$4,294,511	\$3,283,997	\$3,572,901	\$3,572,901	\$288,904
<b>Net County Cost</b>	\$9,545,406	\$13,781,521	\$16,935,442	\$16,935,442	\$3,153,921
<b>Allocated Positions</b>	49.0	51.0	53.0	53.0	2.0
<b>Temporary (Full-Time Equivalent)</b>	7.7	6.7	6.0	6.0	(0.7)
<b>Total Staffing</b>	56.7	57.7	59.0	59.0	1.3

## Purpose

The function of the County Sheriff is mandated by Section 24000 of the Government Code. The level of support services provided to other divisions of the Department is discretionary. This narrative represents both the Sheriff-Administration (#2021645000) and the Sheriff-Information Systems (#2021649000) budgets:

- **Administration Division** – provides management and support services for the Sheriff's Office. Responsibilities include policy setting, budgeting, accounting, payroll, contracts, recruitment and retention, personnel management, and public information.
- **Information Systems** – supports a wide variety of critical automation systems on a 24 hours a day, 7 days per week basis. Systems include Computer Aided Dispatch, Mobile Data Computers, Custody Information, Records Management System, Automated Reporting, Automated Fingerprint, and Civil Automated Processing System. Staff is also responsible for communications, including portable and mobile radios, cell phones, pagers, and landline phones.

## Major Budget Changes

### Salaries & Employee Benefits

- \$490,282 Salary and benefits adjustments.
- \$84,154 Add an Office Technician/Coordinator.
- \$119,791 Add an Administrative Assistant I-II.
- (\$46,856) Decrease in extra-help.

# 2021645000—Sheriff-Administration/Support Services

## Law & Justice

### Services & Supplies

- \$455,482 Increase in software and computer maintenance costs.
- \$306,222 Increase in consulting costs for two Personnel Analyst I-II positions within the Human Resources budget (#1012400000).
- \$162,850 Increase in technology costs.
- \$100,000 Increase in recruitment service costs.
- \$65,000 Increase in training costs for a new Leadership Training development course.
- \$40,554 Increase in body worn camera costs.
- (\$118,825) Decrease in grant program costs due to changes in accounting.

### Centrally-Budgeted Expenses

- \$175,907 Increase in data processing charges.
- \$120,865 Increase in Workers' Compensation and Casualty insurance costs.
- \$93,991 Increase in rents and leases of automation equipment.
- \$99,985 Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

#### Administration (#2021645000)

- \$152,500 Vehicles (3).

#### Information Systems (#2021649000)

- \$444,300 CAD/RMS system.

### Capital Expenditures - Structures and Improvements

#### Administration (#2021645000)

- \$500,000 Range roof.
- \$287,000 Range moving target.

### Revenues

- \$377,525 Increase in Proposition 172 funding.
- (\$118,825) Decrease in Federal funding due to Department of Justice grant ending.

### Operating Transfers In

- \$30,696 Increase in operating transfer from the Inmate Welfare Fund.

## Program Discussion

### Administration/Support Services

The 2023-2024 recommended budget for Administration and Support Services totals \$14,482,077, which is an increase of \$2,234,574 from the 2022-2023 adjusted budget.

The Professional Standards Division (PSD) manages the Department's hiring process, including pre-employment steps such as polygraph tests, background investigations, interviews, and physical and psychological exams; manages the overall training process, which includes oversight of officer range qualifications and maintenance of official training records; and is responsible for Internal Affairs and the Evidence Room.

In May 2020, the Board approved a Recruitment and Retention Pilot Program (B-20-250) managed by the PSD, directed toward professional recruitment efforts including media production, conventional advertisements, data analytics, promotional items, social media services, and signing and referral bonuses for Deputy Sheriff, Correctional Officer, and Dispatcher positions. The Recruitment and Retention Program was extended through June 2024 (B-22-286).

The Recruitment and Retention Program primarily focuses on the Deputy Sheriff, Communications Dispatcher, and Correctional Officer classifications. Since the Program's inception in 2019-2020, the percentage of positions filled in the targeted classifications has risen by 15%.

As of March 2023, a total of \$523,000 has been paid in signing and referral bonuses as follows: \$108,000 in 2020-2021, \$252,000 in 2021-2022, and \$163,000 through March 2023 for 2022-2023. The following table illustrates the amounts paid by division for 2021-2022.

2021-2022 Referral and Signing Bonuses	
Division	Amount Paid
Boating	\$1,000
Communications	13,000
Custody	142,000
Detectives	3,000
Patrol	91,000
Special Services	2,000
<b>Total</b>	<b>\$252,000</b>



# **2021645000—Sheriff-Administration/Support Services**

## **Law & Justice**

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It is estimated \$70,000 additional funds will be expended for the remainder of 2022-2023.

As of March 31, 2023, 114 full-time positions (13%) Department-wide remain vacant. Currently, the PSD is actively conducting background checks to fill vacancies in all Sheriff's Office divisions.

The Professional Standards Division also oversees Evidence Room staff and operations. Evidence Room staff consists of one Sergeant, two Deputy Sheriffs, and four Evidence Technicians. The Evidence Room houses all evidence used for prosecuting criminal offenses committed in the unincorporated areas of the County and property held for safekeeping for individuals that have been taken into custody. With additional staff in 2021-2022, the Department increased efforts to dispose of evidence the Sheriff's Office is no longer legally obligated to store. Design and planning for a new evidence storage facility is expected to begin in 2023, with construction beginning in 2024.

### **Information Systems**

The 2023-2024 recommended budget for Information Systems totals \$6,026,266, which is an increase of \$1,208,251 from the 2022-2023 adjusted budget.

In 2018, the Board of Supervisors (B-18-659) accepted a grant from the U.S. Department of Justice, Office of Justice Programs for upgrades needed to systems for the transition to the National Incident Based Reporting System (NIBRS). Funding was initially intended to fund the NIBRS reporting portion of a new CAD/RMS system. Subsequently, the Department chose to integrate NIBRS into the existing CAD/RMS system and expects to go live by June 2023. During 2023-2024, Information Systems staff will work with the Records and Patrol Divisions to obtain State NIBRS certification.

During 2022-2023, Information Systems staff completed and implemented a customized application for reporting data required by Assembly Bill 953, the Racial and Identity Profiling Act (RIPA) and upgraded the digital logging system that records radio and phone traffic for the Communications Center.

In 2023-2024, projects expected to carry over or begin include the review and migration of application servers to the central Information Systems Division infrastructure, improvement of cyber security and disaster preparedness, enhancement of video and digital recording systems, and the creation of a Power Business Intelligence pilot environment for crime analysis.

## **Supplemental Requests**

### **Administration**

Funding is requested in the amount of \$1,523,168 for the following supplemental requests:

#### ***Range Roof***

Funding is requested in the amount of \$500,000 to build a roof covering over the current range to mitigate weather damage.

#### ***Personnel Analyst II (2)***

Funding is requested in the amount of \$311,220 for reimbursement of two new Personnel Analyst II positions within the Human Resources budget (#1012400000) to administer dedicated human resource support for the Sheriff's Office. Duties will include, but are not limited to, managing recruitment activities, new hire exams, and medical screenings.

#### ***Range Moving Targets***

Funding is requested in the amount of \$287,000 to replace the Coleman Range target system with functional moving targets.

#### ***Administrative Assistant II***

Funding is requested in the amount of \$121,515 for an Administrative Assistant II, and associated equipment costs, to supervise administrative functions of the Sheriff's Office executive team.

#### ***Background Investigator Vehicles (2)***

Funding is requested in the amount of \$110,000 to purchase a sedan and sport utility vehicle for Background Investigators.

#### ***Office Technician/Coordinator***

Funding is requested in the amount of \$85,933 for an Office Technician/Coordinator, and associated equipment costs, to administer and process department-related travel and trainings.

#### ***Leadership Training***

Funding is requested in the amount of \$65,000 to create a leadership development course for current and future Sheriff's Office administrators.

# **2021645000—Sheriff-Administration/Support Services**

## **Law & Justice**

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### ***Public Information Specialist Vehicle***

Funding is requested in the amount of \$42,500 for one vehicle for the Department's Public Information Specialists. A vehicle is needed as these positions are required to attend and respond to various requests Countywide. Such requests include, but are not limited to, community events, recruitment functions, press conferences, and incidents garnering high social media visibility.

The recommended budget has been augmented by \$1,523,168 to address these requests.

### **Information Systems**

Funding is requested in the amount of \$835,981 for the following supplemental requests:

#### ***CAD/RMS Upgrade***

Funding is requested in the amount of \$472,456 to upgrade the Computer Aided Dispatch (CAD) and Records Management System (RMS) to integrate with the Department's evidence system and provide compatibility with body worn camera, taser, and drone equipment.

The total estimated cost of the upgraded system is \$3,712,600 over five years. There is a one-time cost of \$444,300 for the CAD/RMS upgraded system and an ongoing annual maintenance cost of \$653,660. However, in 2020-2021, the Information Systems budget was augmented

by \$625,504 for a CAD system upgrade. The project did not move forward at the time. As a result, funding is requested in the amount of \$444,300 in one-time costs for the new system and an additional \$28,156 each year for five years for the annual maintenance costs.

#### ***NetApp***

Funding is requested in the amount of \$153,650 for additional physical hard drive space.

#### ***Office 365***

Funding is requested in the amount of \$139,675 to purchase 170 licenses for email, PC use, Teams access, and Microsoft Office applications.

#### ***Windows 19 Server***

Funding is requested in the amount of \$61,000 to purchase data licensing for Microsoft Windows Server 2019.

#### ***Tenable Licenses***

Funding is requested in the amount of \$9,200 to expand current Tenable capabilities to accommodate for growth in technology and number of devices attached to the Department's infrastructure.

The recommended budget has been augmented by \$835,981 to address these requests.

# 2021645000—Sheriff-Administration/Support Services

## Law & Justice

Workload Data					
	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Sheriff-Administration</b>					
<i>Background Investigations</i>	971	1,228	1,072	1,000	1,009
<i>Polygraph/Computer Voice Stress Analyzer Examinations</i>	210	629	255	250	364
<i>Psychological Examinations</i>	39	89	59	50	62
<i>Physical Examinations</i>	145	90	70	50	102
<i>Pre-Employment Drug Screening</i>	87	125	122	115	111
<i>Training Classes Scheduled</i>	737	315	368	400	473
<i>Travel Requests Completed</i>	241	263	278	300	261
<i>Concealed Weapons Permits</i>	2,999	2,465	2,138	2,100	2,534
<i>Payroll Slips Processed: Time Earned</i>	83,245	83,853	86,841	87,570	87,500
<i>Payroll Slips Processed: Time Off*</i>	N/A**	13,424	11,976	12,342	12,500
<b>Evidence Room</b>					
<i>Law Enforcement Counter Traffic</i>	1,680	1,700	960	650	1,447
<i>Civilian Counter Traffic</i>	713	971	378	270	687
<i>Evidence/Property Received</i>	12,303	13,513	13,815	11,000	13,210
<i>Evidence/Property Dispositioned</i>	12,540	23,235	35,123	30,000	23,658
<i>Evidence/Property Checked Out</i>	6,016	5,679	4,763	3,000	9,994
<b>Sheriff-Information Systems</b>					
<i>Work Order Requests Completed</i>	3,234	4,949	4,590	5,000	5,000
<i>Average Number of Work Orders Completed Per Info. Systems Staff*</i>	647	990	765	833	833
<i>Locations Supported</i>	15	15	15	15	15
<i>*Includes staff allocated to Sheriff's Office from the Information Systems Division.</i>					
<i>**Data not collected.</i>					

# 2021650000—Sheriff-Lathrop Police Contract

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$5,223,294	\$504,630	\$0	\$0	(\$504,630)
Services & Supplies	261,348	44,775	0	0	(44,775)
Centrally-Budgeted Expenses	325,560	0	0	0	0
Total Expenditures	\$5,810,202	\$549,405	\$0	\$0	(\$549,405)
Expenditure Reimbursements	(24,000)	0	0	0	0
Total Appropriations	\$5,786,202	\$549,405	\$0	\$0	(\$549,405)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$14,963	\$0	\$0	\$0	\$0
Charges For Services	6,073,635	549,405	0	0	(549,405)
Total Revenues	\$6,088,598	\$549,405	\$0	\$0	(\$549,405)
Net County Cost	(\$302,396)	\$0	\$0	\$0	\$0
Allocated Positions	29.0	0.0	0.0	0.0	0.0

## Purpose

The Lathrop Police Contract budget unit captured costs and reimbursements for the Sheriff's Office to provide contract law enforcement services to the incorporated City of Lathrop. Services were provided through a Municipal Law Enforcement Services Agreement with costs reimbursed by the City of Lathrop. The Agreement expired June 30, 2022, and law enforcement services were fully transitioned to the City of Lathrop July 1, 2022.

## Program Discussion

The 2023-2024 recommended budget for the Lathrop Police Contract totals \$0 which is a decrease of \$549,405 from the 2022-2023 adjusted budget, reflecting the end of the contract with the City of Lathrop for law enforcement services.

During 2022-2023, 29 allocated positions were reassigned to the Patrol, Special Services, and Court Services divisions within the Sheriff's Office. Associated operating costs were

removed from the budget as the City of Lathrop began providing police services to the City effective July 1, 2022.

The 2022-2023 adjusted budget contained appropriations for two pay periods of salary and benefits and one month of services and supplies costs to cover anticipated residual expenses. In 2023-2024, the budget unit will be closed.

# 2021658000—Sheriff-Court Services

## Law & Justice

Patrick Withrow, *Sheriff-Public Administrator*  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$10,828,942	\$11,802,013	\$12,981,463	\$12,981,463	\$1,179,450
Services & Supplies	47,492	303,758	315,934	315,934	12,176
Centrally-Budgeted Expenses	829,640	1,416,462	1,288,340	1,288,340	(128,122)
Capital Expenditures	0	45,000	0	0	(45,000)
Total Expenditures	\$11,706,074	\$13,567,233	\$14,585,737	\$14,585,737	\$1,018,504
Expenditure Reimbursements	(84,339)	0	0	0	0
Total Appropriations	\$11,621,735	\$13,567,233	\$14,585,737	\$14,585,737	\$1,018,504
<b>Earned Revenues By Source</b>					
Charges For Services	\$74,101	\$100,000	\$100,000	\$100,000	\$0
Operating Transfers In	11,301,621	12,782,863	14,128,053	14,128,053	1,345,190
Total Revenues	\$11,375,722	\$12,882,863	\$14,228,053	\$14,228,053	\$1,345,190
<b>Net County Cost</b>	\$246,013	\$684,370	\$357,684	\$357,684	(\$326,686)
Allocated Positions	54.0	54.0	54.0	54.0	0.0
Temporary (Full-Time Equivalent)	6.0	5.5	5.0	5.0	(0.5)
Total Staffing	60.0	59.5	59.0	59.0	(0.5)

## Purpose

The Sheriff's Office Court Services Division provides courtroom safety and security for the Superior Court at three locations, including Stockton, Juvenile Justice (French Camp), and Manteca. Most costs incurred for court security operations are reimbursed from the Trial Court Security Special Revenue Fund.

## Major Budget Changes

### Salaries & Employee Benefits

- \$1,140,693 Salary and benefits adjustments.
- (\$38,757) Decrease in extra-help.

### Services & Supplies

- \$12,176 Increase in body worn camera costs.

### Centrally-Budgeted Expenses

- \$138,246 Increase in Workers' Compensation and Casualty insurance costs.
- \$54,740 Increase in radio maintenance charges.
- (\$326,686) Cost Allocation Plan adjustment.

### Operating Transfers In

- \$1,345,190 Increase in operating transfer from the Trial Court Security Special Revenue Fund.

# 2021658000—Sheriff-Court Services

## Law & Justice

### Program Discussion

The 2023-2024 recommended budget for Court Services totals \$14,585,737, which is an increase of \$1,018,504 from the 2022-2023 adjusted budget. A contribution of \$357,684 from the General Fund is included in this budget to cover Cost Allocation Plan charges that are not allowable under the Trial Court Funding Act.

During 2022-2023, Court Services began downsizing staff allocated to the Lodi Court in preparation for branch closure. The Lodi Court officially ceased public operations on March 1, 2023. The staff members allocated to the Lodi Branch, which included one Sergeant, three Deputy Sheriffs, and one

part-time Deputy Sheriff, have been reassigned to the Stockton Courthouse.

### Fund Balance

#### Trial Court Security Fund

Court Services activities are funded from the Trial Court Security Special Revenue Fund (#20107), which receives State sales tax revenue as part of the Public Safety Realignment Act. Annual revenue averages approximately \$9.1 million. As of March 31, 2023, the fund balance was \$11,255,860. A total of \$14,128,053 in combined new revenue and fund balance is designated for use in the 2023-2024 recommended budget.

### Workload Data

		Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	
<i>Allocated Judicial Positions</i>	33	33	33	33	33	
<i>No. of Judicial Court Days/Month</i>	21	21	21	21	21	
<b>Average Daily Staffing</b>						
<i>Stockton</i>	43	47	35	35	40	
<i>Manteca</i>	6	6	8	8	8	
<i>Lodi</i>	3	4	4	5	0**	
<i>Juvenile Justice</i>	2	2	3	3	3	
<b>Inmate Appearances</b>						
<i>Stockton</i>	25,782	26,802	25,210	23,938	27,211	
<i>Manteca</i>	3,956	4,112	3,923	3,908	3,977	
<i>Lodi</i>	2,404	761	2,328	1,619	0**	
<b>Ward Appearances</b>						
<i>Juvenile Justice</i>	N/A*	838	1,219	1,374	1,143	
<b>Judicial Protection Unit</b>						
<i>Investigations/Crime reports</i>	122	135	105	110	118	

\*Data not collected.

\*\*Lodi Court ceased public operations on March 1, 2023.

# 2022600000—Sheriff-Custody

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$54,159,692	\$55,355,191	\$66,655,796	\$66,655,796	\$11,300,605
Services & Supplies	7,005,244	7,722,953	8,159,103	8,159,103	436,150
Centrally-Budgeted Expenses	7,941,001	6,871,479	8,526,289	8,526,289	1,654,810
Other Charges & Uses	0	0	71,841	71,841	71,841
Capital Expenditures	75,020	7,660	0	0	(7,660)
Total Expenditures	\$69,180,957	\$69,957,283	\$83,413,029	\$83,413,029	\$13,455,746
Expenditure Reimbursements	(265,500)	0	0	0	0
Total Appropriations	\$68,915,457	\$69,957,283	\$83,413,029	\$83,413,029	\$13,455,746
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$42,539,521	\$40,406,351	\$46,873,135	\$46,873,135	\$6,466,784
Charges For Services	20,463	7,063	4,400	4,400	(2,663)
Miscellaneous Revenues	50,690	3,200	3,200	3,200	0
Operating Transfers In	1,084,667	2,249,259	2,249,259	2,249,259	0
Total Revenues	\$43,695,341	\$42,665,873	\$49,129,994	\$49,129,994	\$6,464,121
<b>Net County Cost</b>	\$25,220,116	\$27,291,410	\$34,283,035	\$34,283,035	\$6,991,625
<b>Allocated Positions</b>	321.0	322.0	322.0	322.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	2.5	2.3	2.2	2.2	(0.1)
<b>Total Staffing</b>	323.5	324.3	324.2	324.2	(0.1)

## Purpose

The Custody Division of the Sheriff's Office provides for the secure detention of adults awaiting criminal trial or incarceration by the courts in the County Jail. Responsibilities include: operations of the Jail Core, South Jail, and Honor Farm facilities; in-custody transportation to court and for medical treatment; and oversight of inmate programs including Community Corps (C-Corps). The Central Services operations include responsibility for inmate property, laundry, grounds, mailroom, and warehouse.

## Major Budget Changes

### Salaries & Employee Benefits

- \$11,300,605 Salary and benefits adjustments.

### Services & Supplies

- \$199,621 Increase in food service costs.
- \$177,522 Increase in law enforcement taser equipment costs.
- \$69,007 Increase in body worn camera costs.

### Centrally-Budgeted Expenses

- \$885,721 Increase in Workers' Compensation and Casualty insurance costs.
- \$51,815 Increase in radio maintenance costs.
- (\$30,874) Decrease in data processing charges.
- \$743,982 Cost Allocation Plan adjustment.

### Other Charges

- \$71,841 Increase in assessment fees for Reclamation District 17.

# 2022600000—Sheriff-Custody

## Law & Justice

### Revenues

- \$5,715,901 Increase in Proposition 172 funding.
- \$707,000 Increase in Senate Bill 90 claim revenue.
- \$74,883 Increase in reimbursement for the Federal Criminal Alien Assistance Program.
- (\$31,000) Decrease in State Jail Based Competency Treatment grant funding.

### Program Discussion

The 2023-2024 recommended budget for the Custody Division totals \$83,413,029, which is an increase of \$13,455,746 from the 2022-2023 adjusted budget. This increase is primarily due to negotiated salary and benefit adjustments for Correctional Officers. In January 2023, the Board approved salary increases of 5% and 3.5% for members of the Correctional Officers Association to take effect in January 2023 and January 2024, respectively (B-23-15). Additionally, Correctional Officers were approved to receive weekend shift differential pay of \$2.00 per hour.

#### Correctional Officer Staffing

As of March 31, 2023, 38 out of 247 Correctional Officer positions Department-wide were vacant. The Department continues to make a determined effort to recruit and fill Correctional Officer positions. Overtime overruns of \$5.3 million are projected at year-end 2022-2023, and are currently being partially covered by savings from vacant positions.

#### Realignment Unit

The Custody Realignment Unit is comprised of one (1) Office Assistant Specialist, two (2) Correctional Officers, one (1) Correctional Sergeant, and is managed by a Correctional Lieutenant. Typical duties include review of all proposed and active legislative updates pertaining to AB 109, attending all Local Community Corrections Partnership (CCP) and other relevant meetings and conferences, prepare reports, collect data and statistics, and make public presentations relating to AB 109 jail trends. The Unit works closely with the Probation Department and the Data Co-op to provide essential offender data for various local and State reports and surveys.

For 2023-2024, the CCP approved continuing AB 109 funding of \$8,357,932 to support the Sheriff's operation in five service need areas:

CCP Approved Continuing AB 109 Funding	
Service Needs	Cost
Housing And Staffing Costs	\$5,840,408
Inmate Programming	657,792
Alternatives To Incarceration	400,754
Bailiff Services	341,510
Program Support	1,117,468
<b>Total</b>	<b>\$8,357,932</b>

*Costs charged to CCP for Jail food service, laundry, and household expenses are based on the actual proportion of inmates classified as AB 109.*

#### Sheriff's Office Facilities/Capital Improvement

A Sheriff's Office training facility and classroom building were approved by the Capital Review Committee to be included in the County's Capital Improvement Program Five-Year Plan 2022-2023 to 2026-2027. Sheriff operations have grown considerably and space is needed to provide training rooms for defensive tactics, simulation training, computer rooms, and Sheriff's academy classrooms. The projects are expected to be completed by 2024-2025.

The Board of State and Community Corrections (BSCC) awarded the County a total of \$36.5 million for jail construction under Senate Bill (SB) 1022, which was approved by the Board on October 22, 2019 (B-19-646). On January 24, 2023, the Board approved the San Joaquin County Detention and Program Facility Project (B-23-33). In February 2023, advertisements for bids were released and the General Services Department (GSD) anticipates returning to the Board for approval of a construction contract in May 2023. The construction phase of the Detention and Program Facility is expected to be completed in April 2025 and subsequently ready for occupancy.

#### Jail Security Electronics Upgrade

The Custody Division continues to work in partnership with GSD and a private consulting firm to upgrade the Jail's security electronics. The enhancement provides replacement of systems in use for door controls and cameras to allow for visualization within the housing areas and other locations. Due to its complexity, the project is designed to continue through multiple years. The project began in January 2022, and is expected to be completed in September 2023.



# 2022600000—Sheriff-Custody

## Law & Justice

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### *Inmate Programs*

In-person learning resumed in 2022-2023 after being suspended due to COVID-19. With the assistance of the County Office of Education, the Custody Division was able to provide inmates with online classes. Inmates can participate in a high school diploma program as well as an ownership class, a course designed to assist inmates with decision making skills to improve their quality of life.

In January 2023, the Board approved (B-23-44) a Memorandum of Understanding (MOU) between the Sheriff and the San Joaquin County Office of Education (SJCOE). The MOU outlines the roles and responsibilities of the Sheriff and SJCOE for providing educational programs in the San Joaquin County Jail. The MOU expires June 30, 2023, with the option for an extension should both parties agree.

In March 2023, the Sheriff's Information Technology staff updated the General Educational Development (GED) computer lab with new computers and updated software. New computers in the lab will have the ability to continue to support the READ 180 program, which provides curriculum, instruction, assessment, and professional development for inmates with reading difficulties.

### *Inmate Transfer Funding*

The California Department of Corrections and Rehabilitation (CDCR) allocated \$6,287,759 of unbudgeted revenues, for fiscal years 2020-2021 and 2021-2022, to the Sheriff's Office for housing inmates sentenced to State prison but remained in San Joaquin County custody due to a halt on inmate transfers. On April 19, 2022, the Board approved the use of the CDCR funds for the purchase of body worn cameras (B-22-204). In December 2022 the Custody Division purchased 310 body worn cameras for Correctional Officers and Deputy Sheriffs assigned to the Division. The addition of body worn cameras will provide an added layer of security and transparency for both correctional staff and inmates.

### *Jail Based Competency Treatment Program*

The Custody Division houses inmates pending space availability at a State mental health facility for individuals found incompetent to stand trial. Waiting time averages six months, during which time inmates are left undertreated, creating custody challenges for both the inmates and the staff.

In June 2021, a three-year agreement with the Department of State Hospitals was approved to fully reimburse the County for the cost of a 10-bed Jail Based Competency Treatment Program. Reimbursement includes the cost for two Correctional Officers assigned to the program and Behavioral Health staff.

Upon the first patient inmate admission, the per diem rate has been \$403.07 per bed, totaling \$4,030.70 per day for 10 allocated beds. The maximum amount of reimbursement for this agreement cannot exceed \$5,276,992 during the initial three-year term. The contract term expires May 31, 2024. The success rate of this program is currently at a 65% restoration to competency rate. Given the success rate, the Sheriff plans to exercise the right to extend the terms of this agreement.

## Supplemental Request

The Sheriff is requesting supplemental funding totaling \$177,522 for the following:

### *Tasers (225)*

Funding is requested in the amount of \$177,522 to equip Correctional Officers with tasers, and associated equipment costs, to use as a deterrent and to reduce use of force incidents in instances where detainees are uncooperative.

The estimated total project cost is \$887,610 over five years for 225 tasers, which will result in an augmentation of \$177,522 per year.

The recommended budget has been augmented by \$177,522 to address this request.

# 2022600000—Sheriff-Custody

## Law & Justice

### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Average Daily Inmate Population</b>	1,322	1,374	1,273	1,257	1,265
<i>New Bookings</i>	19,289	17,767	16,857	16,754	16,806
<i>Total Releases</i>	18,272	17,760	14,476	16,246	15,361
<i>Court Cap Releases</i>	497	949	1,305	1,252	1,279
<i>AB 109 Population</i>	17%	15%	16%	16%	15%
<i>Canine Bunk and Unit Searches</i>	11,339	10,200	854	822	965
<i>Canine Searches-Contraband Seized</i>	509	314	250	286	223
<i>Canine Searches-Drugs/Tobacco Seized (Grams)</i>	6,242	3,953	3,590	3,173	3,572
<b>Inmate Transportation</b>					
<i>Stockton Court</i>	27,361	25,129	23,765	25,345	26,032
<i>Lodi Court</i>	1,453	531	1,653	243	0*
<i>Manteca Court</i>	4,860	4,673	3,874	4,125	4,367
<i>State Hospitals</i>	168	98	153	174	191
<i>State Prisons</i>	82	90	139	167	183
<i>Topic Drop off</i>	201	236	265	284	312
<i>Topic Pickup</i>	147	172	167	182	197
<b>Inmate Transportation Miles, Buses</b>	18,926	25,681	30,247	32,587	34,782
<b>Inmate Transportation Miles, All Other Vehicles</b>	167,832	153,547	166,786	182,431	199,327

\*Lodi Court closed effective March 1, 2023.

# 2022610000—Sheriff-Local Community Corrections

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,820,399	\$5,474,597	\$6,460,005	\$6,460,005	\$985,408
Services & Supplies	550,072	1,496,698	1,571,698	1,571,698	75,000
Centrally-Budgeted Expenses	191,313	266,646	326,229	326,229	59,583
Total Expenditures	\$5,561,784	\$7,237,941	\$8,357,932	\$8,357,932	\$1,119,991
Expenditure Reimbursements	(28,000)	0	0	0	0
Total Appropriations	\$5,533,784	\$7,237,941	\$8,357,932	\$8,357,932	\$1,119,991
<b>Earned Revenues By Source</b>					
Operating Transfers In	\$5,533,784	\$6,880,771	\$8,357,932	\$8,357,932	\$1,477,161
Fund Balance	0	357,170	0	0	(357,170)
Total Revenues	\$5,533,784	\$7,237,941	\$8,357,932	\$8,357,932	\$1,119,991
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	34.0	34.0	34.0	34.0	0.0
Temporary (Full-Time Equivalent)	0.5	0.5	0.4	0.4	(0.1)
<b>Total Staffing</b>	34.5	34.5	34.4	34.4	(0.1)

## Purpose

The 2011 Public Safety Realignment Act (also known as Assembly Bill 109) became effective on October 1, 2011. This legislation transferred responsibility for supervising specified lower-level inmates and parolees from the State to counties.

Assembly Bill (AB) 109 requirements are implemented in each county through a Community Corrections Partnership (CCP) previously established by Senate Bill (SB) 678. The CCP develops a plan of implementation and oversight of the public safety realignment process.

Funding for AB 109 activities is provided to the Probation Department, the Sheriff's Office, and other agencies through the County budget. This narrative describes the Local Community Corrections services provided by the Sheriff's Office.

## Major Budget Changes

### Salaries & Employee Benefits

- \$985,408 Salary and benefits adjustments.

### Centrally-Budgeted Expenses

- \$39,361 Increase in Workers' Compensation insurance costs.
- \$12,032 Cost Allocation Plan adjustment.

### Services & Supplies

- \$75,000 Increase in adult education costs.

### Operating Transfers In

- \$1,477,161 Increase in operating transfer from the State.

# 2022610000—Sheriff-Local Community Corrections

## Law & Justice

### Revenue

- (\$357,170) Decrease in use of fund balance.

### Program Discussion

The 2023-2024 recommended budget for the Local Community Corrections totals \$8,357,932, which is an increase of \$1,119,991 from the 2022-2023 adjusted budget. The recommended budget represents the anticipated allocation of AB 109 funding for 34 full-time Sheriff’s Office positions, part-time staff to provide bailiff services, inmate housing, and other costs approved by the Community Corrections Partnership (CCP).

### Discharge Planning Unit

The 2019-2020 budget added two Social Worker positions in order to establish a Discharge Planning Unit for inmates released from the jail. With over 11,000 inmates released annually, many lack a plan for provision of the basic necessities that were provided by the jail. Discharge planning services include transportation, housing, medical, job placement, referrals, and connections with community providers. As of March 2023, one position has been filled and recruitment efforts continue to fill the second vacant Social

Worker position. It is anticipated that Social Workers assisting in the transition back into society will produce a more positive outcome into the community.

### Custody Realignment Unit

The Custody Realignment Unit, funded in part by AB 109, consists of a Correctional Lieutenant, Correctional Sergeant, two Correctional Officers, and an Office Assistant Specialist. This Unit reviews legislative updates pertaining to AB 109, supplies offender data and statistics to the CCP for various reports, and attends relevant meetings and conferences.

The Unit oversees the design and planning of the new medium-security facility to replace the Honor Farm (SB 1022), as well as the currently underway Jail Central Controls Upgrade project, funded through the Public Improvement budget (#1040148000).

### Fund Balance

#### Local Community Corrections Fund

As of March 31, 2023, the Local Community Corrections Special Revenue Fund (#20051) balance was \$61,071,170. The 2023-2024 recommended budget includes the use of \$8.4 million of fund balance.

### Workload Data

	<u>Actual</u>			<u>Est./Act.</u>	<u>Projected</u>
	<u>2019-2020</u>	<u>2021-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>
Average Daily Inmate Population	1,322	1,374	1,273	1,257	1,265
AB 109 Population/%	220/17%	206/15%	193/15%	201/16%	190/15%

# 2022620000—Sheriff-Work Programs

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$947,489	\$1,153,655	\$1,279,294	\$1,279,294	\$125,639
Services & Supplies	68,356	106,231	108,617	108,617	2,386
Centrally-Budgeted Expenses	64,215	38,582	86,136	86,136	47,554
Total Expenditures	\$1,080,060	\$1,298,468	\$1,474,047	\$1,474,047	\$175,579
Expenditure Reimbursements	(8,000)	0	0	0	0
Total Appropriations	\$1,072,060	\$1,298,468	\$1,474,047	\$1,474,047	\$175,579
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$976,424	\$975,742	\$986,770	\$986,770	\$11,028
Charges For Services	46,542	0	0	0	0
Total Revenues	\$1,022,966	\$975,742	\$986,770	\$986,770	\$11,028
<b>Net County Cost</b>	\$49,094	\$322,726	\$487,277	\$487,277	\$164,551
<b>Allocated Positions</b>	9.0	9.0	9.0	9.0	0.0

## Purpose

The Sheriff's Work Programs budget includes programs that provide alternatives to incarceration for eligible individuals who have been sentenced by the Court. These programs are an effective means of reducing overcrowding in the County Jail. The programs include:

- **Alternative Work Program (AWP)** – Participants serve two to five days per week in community service in lieu of serving time in custody. This process assists in managing the Jail population and allows better management of low-risk inmates.
- **Electronic Monitoring Program (EMP)** – Provides a radio frequency ankle bracelet system for home detention monitoring of sentenced inmates. Benefits include keeping offenders gainfully employed and providing for their families; and fulfilling other community obligations, while paying their debt to society. It also provides an option for the chronically ill to serve their sentence at home, allowing access to their own medical care providers and relieving pressure on Correctional Health Services.
- **Electronic Monitoring Work Program (EMWP)** – Under the EMP umbrella, allows participants to work or attend school at an authorized site during electronic monitoring.
- **Alcohol Monitoring Program (AMP)** – In conjunction with other release programs, uses an electronic monitor to measure skin alcohol level on a continuous basis for those whose participation is dependent on abstaining from alcohol.

## Major Budget Changes

### Salaries & Employee Benefits

- \$125,639 Salary and benefits adjustments.

### Centrally-Budgeted Expenses

- \$10,263 Increase in Workers' Compensation insurance costs.
- \$36,168 Cost Allocation Plan adjustment.

# 2022620000—Sheriff-Work Programs

## Law & Justice

### Revenues

- \$11,028 Increase in Proposition 172 funding.

### Program Discussion

The 2023-2024 recommended budget for Work Programs totals \$1,474,047, which is an increase of \$175,579 from the 2022-2023 adjusted budget.

Work Programs revenues continue to decline. Revenues in 2018-2019 declined slightly to \$832,147. In 2019-2020, revenues dropped significantly to \$552,128 due primarily to the COVID-19 pandemic and changes in court processes. In 2020-2021 revenues again dropped slightly to \$545,468.

Due to AB 1869, which took effect on July 1, 2021, the Alternative Work Program is no longer permitted to charge administrative fees to program participants. In order to

backfill for the loss of revenues, the State provides an annual allocation to counties. In 2021-2022, the Work Programs budget received an allocation of \$901,774, and in 2022-2023 another allocation in the same amount was received. This allocation is again included in the 2023-2024 budget.

In August 2020, the Work Programs Unit launched the Electronic Monitoring Work Program (EMWP) under the EMP umbrella. EMWP allows both employed and unemployed participants to work or attend school at an approved site and offers an alternative to home detention monitoring which provides a benefit to the participant and the community.

The Work Programs Unit is aided by two positions funded with Public Safety Realignment funds. A Deputy Sheriff II and an Office Assistant Specialist allocated to the Sheriff-Local Community Corrections budget (#2022610000) are assigned to Work Programs.

### Workload Data

	<u>Actual</u>			<u>Est./Act.</u>	<u>Projected</u>
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Alternative Work Program</b>					
<i>Applications</i>	1,596	1,151	2,138	1,940	1,959
<i>Enrollments</i>	1,372	1,020	1,200	1,095	1,406
<b>Electronic Monitoring Program</b>					
<i>Applications</i>	208	153	259	385	389
<i>Enrollments</i>	66	85	85	112	104
<b>Alcohol Monitoring Program</b>					
<i>Participants</i>	43	44	58	55	60
<b>Counter Engagement</b>	7,509	7,680	8,267	8,260	9,515

# 2025700000—Sheriff-Public Administrator

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$540,543	\$636,251	\$721,767	\$721,767	\$85,516
Services & Supplies	21,420	41,153	41,153	41,153	0
Centrally-Budgeted Expenses	33,039	48,127	94,503	94,503	46,376
Total Expenditures	\$595,002	\$725,531	\$857,423	\$857,423	\$131,892
Expenditure Reimbursements	(4,000)	0	0	0	0
Total Appropriations	\$591,002	\$725,531	\$857,423	\$857,423	\$131,892
<b>Earned Revenues By Source</b>					
Charges For Services	\$250,944	\$245,000	\$300,000	\$300,000	\$55,000
Total Revenues	\$250,944	\$245,000	\$300,000	\$300,000	\$55,000
Net County Cost	\$340,058	\$480,531	\$557,423	\$557,423	\$76,892
Allocated Positions	4.0	5.0	5.0	5.0	0.0

## Purpose

The Public Administrator is mandated under California law to take charge of estates when no other person qualifies. This includes the administration of estates when an executor is not able to serve, and where no person having priority of appointment over the Public Administrator can be, or is willing to be, appointed as administrator.

Staff participate in a full range of activities established by the California Probate Code. Responsibilities include locating and determining heirs; marshaling, protecting, and liquidating assets as required; making funeral arrangements; paying estate debts; managing and selling real and personal property; clearing tax obligations of estates; preparing estate financial reports; distributing residue to those entitled; and coordinating casework with County Counsel, the courts, and other agencies.

In some cases, the Public Administrator serves to administer the estate to its conclusion; in others, the Public Administrator serves as caretaker until the family is located, and then refers the case to the family for completion.

## Major Budget Changes

### Salaries & Employee Benefits

- \$85,516 Salary and benefits adjustments.

### Centrally-Budgeted Expenses

- \$11,994 Increase in Casualty insurance costs.
- \$31,856 Cost Allocation Plan adjustment.

### Revenue

- \$55,000 Increase in estate fee revenues.

## Program Discussion

The 2023-2024 recommended budget for the Public Administrator totals \$857,423, which is an increase of \$131,892 from the 2022-2023 adjusted budget.

The Public Administrator experienced an increase in case referrals due to a Countywide rise in the death rate from COVID-19. Additionally, the Office of the Medical Examiner changed the criteria for managing indigent and unclaimed decedent cases, further increasing the Public Administrator's caseload. The average caseload rose 39% between fiscal years 2019-2020 and 2020-2021 and another 10% between 2020-2021 and 2021-2022. The caseload will continue to be monitored.

# 2025700000—Sheriff-Public Administrator

## Law & Justice

A Deputy Public Administer I-II (DPA) was added during fiscal year 2022-2023 to help address the increase in cases managed by the Division. The additional staff has allowed for the redistribution of casework; thus, reducing the number of cases each DPA is responsible for managing. This has resulted in quicker response times on case referrals, allowed for more thorough case reviews, and provided flexibility for larger, more complex cases.

In 2021-2022, the Sheriff's Office Information Technology staff developed a custom case management system. The Division continues to work with Sheriff's Office Information Technology staff to improve case management capabilities, streamline workflow, centralize digital caseload information, and caseload tracking in real time using the case management system in 2023-2024.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>Decedent Estates</i>	179	196	206	212	205
<i>Estates with Real Estate</i>	23	22	20	15	15
<i>Re-opened Cases</i>	2	3	2	3	3
<i>Cases Referred to Family Members</i>	10	40	21	20	20
<i>Average Number of Open Cases</i>	120	167	183	175	185
<i>Closed Cases</i>	149	140	163	155	153
<i>Value of Estates Managed (Total)</i>	\$3,398,993	\$3,398,993	\$4,869,452	\$5,574,471	\$5,380,322



# Sheriff-State COPS Patrol & Custody

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator

[www.sjsheriff.org/](http://www.sjsheriff.org/)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$0	\$272,029	\$312,540	\$312,540	\$40,511
Services & Supplies	45,352	1,731,759	2,154,259	2,154,259	422,500
Centrally-Budgeted Expenses	17,737	12,792	11,117	11,117	(1,675)
Capital Expenditures	176,707	194,010	152,352	152,352	(41,658)
Total Appropriations	\$239,796	\$2,210,590	\$2,630,268	\$2,630,268	\$419,678
<b>Earned Revenues By Source</b>					
Interest/Rents	\$13,980	\$0	\$0	\$0	\$0
Aid From Other Governments	737,797	709,940	725,152	725,152	15,212
Miscellaneous Revenues	210	0	0	0	0
Fund Balance	(512,191)	1,500,650	1,905,116	1,905,116	404,466
Total Revenues	\$239,796	\$2,210,590	\$2,630,268	\$2,630,268	\$419,678
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	2.0	2.0	2.0	2.0	0.0

## Purpose

Since 1996, the State Citizens' Option for Public Safety (COPS) program has provided funding to local agencies for front-line law enforcement services, enhanced prosecution efforts, and jail operation/construction. Funding is provided from State Vehicle License Fees and allocated by formula to city and county law enforcement, the District Attorney's Office, and the County Jail. This narrative represents the program funding allocated by the State to Sheriff's law enforcement operations including COPS Patrol (#2021655000) and COPS Custody (#2021657000).

## Major Budget Changes

### Salaries & Employee Benefits

- \$40,511 Salary and benefits adjustments.

### Services & Supplies

- \$422,500 Increase in law enforcement equipment purchases.

### Capital Expenditures - Equipment

#### COPS Patrol (#2021655000)

- \$88,576 X-ray panels (2).
- \$63,776 Drone systems (4).

### Revenues

- \$404,466 Increase in use of fund balance.
- \$15,212 Increase in State revenue.

## Program Discussion

The 2023-2024 recommended budget for the State Citizens' Option for Public Safety (COPS) for Sheriff programs totals \$2,630,268, which is an increase of \$419,678 from the 2022-2023 adjusted budget.

### COPS Patrol

The 2023-2024 COPS Patrol allocation of \$374,681 along with a budgeted fund balance of \$635,667 provides funding for a Deputy Sheriff, software maintenance and license fee,

# ***Sheriff-State COPS Patrol & Custody***

## ***Law & Justice***

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training and travel, equipment purchases, and other program expenses.

### **COPS Custody**

The 2023-2024 COPS Custody allocation of \$350,471, along with a budgeted fund balance of \$1,269,449, provides funding for a Correctional Officer, training and travel, equipment purchases, and other program expenses.

## **Fund Balance**

### **Supplemental Law Enforcement Services Fund**

The Supplemental Law Enforcement Services Special Revenue Fund (#20052) receives funding for the State COPS programs operated by the Sheriff and the District Attorney, as well as Juvenile Justice Crime Prevention Act activities operated by Probation. For 2022-2023, the beginning fund balances for Sheriff COPS Patrol and COPS Custody were \$953,330 and \$992,520, respectively.

# Sheriff-Operational Grants

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$41,097	\$28,974	\$39,336	\$39,336	\$10,362
Services & Supplies	204,989	460,772	129,922	129,922	(330,850)
Capital Expenditures	41,096	197,345	525,000	525,000	327,655
Total Expenditures	\$287,182	\$687,091	\$694,258	\$694,258	\$7,167
Expenditure Reimbursements	(17,763)	(37,298)	(141,867)	(141,867)	(104,569)
Total Appropriations	\$269,419	\$649,793	\$552,391	\$552,391	(\$97,402)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$208,281	\$600,457	\$552,391	\$552,391	(\$48,066)
Miscellaneous Revenues	111,830	0	0	0	0
Operating Transfers In	0	49,336	0	0	(49,336)
Total Revenues	\$320,111	\$649,793	\$552,391	\$552,391	(\$97,402)
Net County Cost	(\$50,692)	\$0	\$0	\$0	\$0

- In 2023-2024, the California Multi-Jurisdictional Methamphetamine Enforcement Team (Cal-MMET) (#2021609000) budget unit was removed from Sheriff Operational Grants and became a standalone budget unit separate from Operational Grants.

## Purpose

The Sheriff's Office receives various grants, which provide funding for specialized areas of law enforcement.

This discussion includes the following grant budgets:

- Abandoned Watercraft (#2021608000)
- Off-Highway Enforcement (#2021614170)
- Port Security Grant Program (#2021616000)

## Major Budget Changes

### Salaries & Employee Benefits

- \$10,362 Increase in overtime costs.

### Services & Supplies

- (\$330,850) Decrease in abandoned vessel removal costs.

### Capital Expenditures - Equipment

#### Port Security Grant - 2021616000

- \$525,000 Boat.

### Expenditure Reimbursements

- \$104,569 Increase in reimbursement overall from the Sheriff's Patrol budget (#2021620000).

# Sheriff-Operational Grants

## Law & Justice

### Revenues

- \$245,741 Increase in Federal revenue for Port Security Grant program.
- \$10,362 Increase in State revenues for Off-Highway Enforcement Grant program.
- (\$304,169) Decrease in State revenues for Surrendered and Abandoned Vessel Exchange program.

### Operating Transfers In

- (\$49,336) Decrease in operating transfers in from asset forfeiture proceeds.

## Program Discussion

### Abandoned Watercraft/Surrendered and Abandoned Vessel Exchange (SAVE) Grant

Since 2000, the Sheriff's Office has received a total of \$1,481,987 in State grant funding for removal of abandoned watercraft from Delta waterways.

In October 2021, the Board of Supervisors accepted a new SAVE grant (B-21-651) in the amount of \$150,000. This new award plus a 10% County match provides funding of \$165,000 for removals through September 2023. A balance of \$106,172 remains and is being re-budgeted to facilitate the purchasing process. This budget includes a cost reimbursement of \$10,617 from the Sheriff's Patrol budget (#2021620000).

SAVE Grant	Award	Total with 10% County Match	2023-2024 Remaining Re-Budgeted
October 2021	\$150,000	\$165,000	\$106,172
<b>Total</b>	<b>\$150,000</b>	<b>\$165,000</b>	<b>\$106,172</b>

### Cal-MMET Grant

In November 2022, the Sheriff's Office received approval from the County Administrator's Office to convert the Cal-MMET budget (#2021609000) to an allocation budget beginning in fiscal year 2023-2024, as it is no longer grant funded. Additional Cal-MMET budget information can be found in the Cal-MMET budget unit (#2021609000).

### Off-Highway Enforcement Grant

The Sheriff's Office has historically received State grant monies to perform off-highway vehicle law enforcement, including funding for staff overtime, off-highway vehicles, equipment, off-highway motor vehicle enforcement, and public education through attendance at many off-road enthusiast events.

The recommended budget includes \$63,086 to draw down the existing grant award into 2023-2024. Funds awarded for the grant obtained during 2022-2023 will be exhausted by January 1, 2024. The Sheriff's Office will submit another grant application during 2023-2024 for the following fiscal year. If awarded, the Sheriff will return to the Board to accept the grant and adjust the budget as appropriate. If not, enforcement will continue on a limited basis.

### Port Security Grant Program (PSGP)

Since September 11, 2001, the U.S. Congress has appropriated funding for competitive grants to U.S. seaports to finance the cost of enhancing national port security. FEMA has made a portion of these funds available through the Port Security Grant Program. This program has provided for the purchase of a boat, bomb robot, and a SWAT vehicle in 2013. Since 2018, the Sheriff's Office has also received funding to purchase a 27-foot regional response vessel for the Sheriff's Boating Safety Unit, 15 night-vision goggle systems, and an underwater Remotely Operated Vehicle.

The Sheriff's Office intends to submit a grant application in 2023-2024 for the purchase of an additional boat in the amount of \$525,000. The anticipated grant award and matching funds are included in the 2023-2024 Proposed Budget. If awarded, the Sheriff will return to the Board to accept the grant.

# Sheriff-Special Fund Programs

## Law & Justice

Patrick Withrow, Sheriff-Public Administrator  
[www.sjsheriff.org/](http://www.sjsheriff.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$120,336	\$119,797	\$147,603	\$147,603	\$27,806
Services & Supplies	776,777	990,386	1,119,056	1,119,056	128,670
Centrally-Budgeted Expenses	12,946	12,488	11,691	11,691	(797)
Capital Expenditures	50,527	1,000,000	750,000	750,000	(250,000)
Operating Transfers Out	90,000	90,000	90,000	90,000	0
Total Expenditures	\$1,050,586	\$2,212,671	\$2,118,350	\$2,118,350	(\$94,321)
Expenditure Reimbursements	(2,000)	0	0	0	0
Total Appropriations	\$1,048,586	\$2,212,671	\$2,118,350	\$2,118,350	(\$94,321)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$415	\$173	\$750	\$750	\$577
Aid From Other Governments	159,653	0	0	0	0
Miscellaneous Revenues	94,514	74,827	73,845	73,845	(982)
Operating Transfers In	869,292	2,137,671	2,043,755	2,043,755	(93,916)
Fund Balance	(75,288)	0	0	0	0
Total Revenues	\$1,048,586	\$2,212,671	\$2,118,350	\$2,118,350	(\$94,321)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	1.0	1.0	1.0	1.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	0.5	0.5	0.8	0.8	0.3
<b>Total Staffing</b>	1.5	1.5	1.8	1.8	0.3

## Purpose

The Sheriff's Office receives asset forfeiture funds from both the State and Federal governments as the result of narcotics-related arrests. In addition, vehicle registration fees provide funding for the Automated Fingerprint Identification (ID) Program and the Auto Theft Task Force.

The Special Fund Programs discussion includes the following budget units:

- State Narcotics Enforcement (#2021606000)
- Automated Fingerprint ID (#2021610000)
- Federal Narcotics Enforcement (#2021607000)
- Auto Theft Task Force (#2021627000)

## Major Budget Changes

### Salaries & Employee Benefits

- \$7,757 Salary and benefits adjustments.
- \$20,050 Increase in extra-help costs.

### Services & Supplies

- \$123,550 Increase in Live Scan maintenance costs.

# Sheriff-Special Fund Programs

## Law & Justice

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### Capital Expenditures - Equipment

#### *Automated Fingerprint ID (#2021610000)*

- \$750,000 Automated fingerprint ID equipment.

### Operating Transfers In

- \$26,193 Increase in operating transfer from the Auto Theft Investigation and Prosecution Fund.
- (\$120,108) Decrease in operating transfer from the Automated Fingerprint ID Fund.

## Program Discussion

### State Narcotics Enforcement Fund

State law establishes procedures for the forfeiture and distribution of property used in the commission of controlled substance offenses with the requirement that property transferred to a local agency, including cash or proceeds, be used for law enforcement purposes. The Sheriff's State Narcotics Enforcement Special Revenue Fund (#20035) receives minimal annual revenue, as the majority of asset forfeiture proceeds are directed to support the Metro Narcotics Task Force. As of March 31, 2023, the fund balance was \$203,777.

The 2023-2024 recommended budget includes \$73,845 in asset forfeiture revenue to be used for operation and maintenance of the Sheriff's Mobile Law Enforcement Center, communications, utilities for the Sheriff's warehouse at the Port of Stockton, and equipment.

### Federal Narcotics Enforcement Fund

Federal law prescribes the method for disposition of assets or proceeds used in drug crimes, including the transfer of seized assets to local law enforcement agencies. Following the close of each fiscal year, the Board of Supervisors approves an agreement to participate in the Federal Equitable Sharing Program. This agreement and an annual certification report must be submitted within 60 days after the close of the fiscal year in order to receive shared cash, property, or proceeds seized as part of a Federal Asset Forfeiture Case.

As of March 31, 2023, the fund balance in the Sheriff's Federal Narcotics Enforcement General Fund Special Account (#11201) was \$342,350. The 2023-2024 recommended budget includes \$155,000 to be used for law enforcement equipment and to replenish an investigations cash fund to support the Metro Narcotics Task Force, Investigations, Special Services, and Patrol divisions.

In 2019, the Department of Justice changed the criteria for asset sharing no longer allowing multi-agency task forces to receive shared funds. Proceeds are directed to the Federal Narcotics Enforcement Fund.

### Automated Fingerprint Identification Fund

The Automated Fingerprint ID General Fund Special Account (#11216) is funded by an assessment added to various fines, penalties, and forfeitures. The fund also receives a fee of \$1 per vehicle registered in the County. Annual revenue is approximately \$780,000. As of March 31, 2023, the fund balance was \$1,965,554.

In 2023-2024, a total of \$1,537,740 is budgeted for systems maintenance, communications, software, reimbursement for an Evidence Technician, and automation equipment. This figure represents a decrease of \$120,108 from the 2022-2023 adjusted budget.

Monies collected in the fund are used for expenses related to fingerprint identification systems, including the purchase and maintenance of equipment that allows local law enforcement agencies to access the California Identification (Cal-ID) System containing over five million fingerprints. Expenditures are overseen by the Remote Access Network (RAN) Committee, with input from its Technical Advisory Committee. The RAN Committee is comprised of a member of the Board of Supervisors, the Sheriff, the District Attorney, local police chiefs, a Mayor of a local city, and a member-at-large.

During 2020-2021, the RAN Committee authorized an upgrade to the County's Live Scan infrastructure. The Sheriff's Office worked with the Purchasing Department to issue a Request for Proposals (RFP) to upgrade and update software, fingerprint workstations, equipment, and mobile ID systems. An evaluation team, comprised of Sheriff's Office staff and Live Scan users, with input from the Purchasing staff, selected a vendor best fitting the County's needs.

Sheriff's Office staff, with the selected vendor, began training Live Scan users Countywide in May 2022. Approximately 110 users from San Joaquin County police departments, school districts, and cities were provided training. In June 2022, staff began testing equipment and connections with the Department of Justice. Deployment of equipment began in August 2022 and was completed in March 2023.

### Auto Theft Task Force

The Auto Theft Task Force includes personnel from the California Highway Patrol, District Attorney's Office, Probation Department, and local police departments. Funded

# ***Sheriff-Special Fund Programs***

## ***Law & Justice***

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by a fee of \$1 per vehicle registered in the County, monies in the Auto Theft Investigation and Prosecution General Fund Special Account (#12124) are used exclusively to investigate and prosecute auto theft cases. Annual Revenue is approximately \$700,000. As of March 31, 2023, the fund balance was \$434,217.

The 2023-2024 Auto Theft Task Force budget for the Sheriff's Office totals \$351,015. This figure represents an

increase of \$26,193, primarily reflecting salary and benefit adjustments and an increase in part-time help. The budget provides funding for a Senior Office Assistant, a part-time Evidence Technician, partial reimbursement for a Deputy Sheriff allocated to the Patrol Division, and miscellaneous supplies and equipment. Costs for Task Force personnel from other agencies are paid directly from the fund and are not included as part of this budget.

# 2022621000—Correctional Health Services

## Law & Justice

Greg Diederich, *Health Care Services Director*  
[www.sjgov.org/departments/hcs](http://www.sjgov.org/departments/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$12,206,229	\$14,239,063	\$15,825,793	\$15,825,793	\$1,586,730
Services & Supplies	2,798,031	3,535,536	4,277,076	4,277,076	741,540
Centrally-Budgeted Expenses	772,994	937,775	1,155,778	1,155,778	218,003
Capital Expenditures	23,856	45,705	1,116,500	1,116,500	1,070,795
Total Expenditures	\$15,801,110	\$18,758,079	\$22,375,147	\$22,375,147	\$3,617,068
Expenditure Reimbursements	(3,009,083)	(3,657,751)	(4,401,908)	(4,401,908)	(744,157)
Total Appropriations	\$12,792,027	\$15,100,328	\$17,973,239	\$17,973,239	\$2,872,911
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$994,093	\$1,008,669	\$1,008,669	\$1,008,669	\$0
Charges For Services	1,656	0	0	0	0
Miscellaneous Revenues	10,438	4,000	46,500	46,500	42,500
Total Revenues	\$1,006,187	\$1,012,669	\$1,055,169	\$1,055,169	\$42,500
<b>Net County Cost</b>	\$11,785,840	\$14,087,659	\$16,918,070	\$16,918,070	\$2,830,411
<b>Allocated Positions</b>	79.0	78.0	81.0	81.0	3.0
<b>Temporary (Full-Time Equivalent)</b>	24.5	22.1	19.4	19.4	(2.7)
<b>Total Staffing</b>	103.5	100.1	100.4	100.4	0.3

## Purpose

Correctional Health Services (CHS) provides medical, dental, and behavioral health care to inmates and youth of the County's adult and juvenile detention facilities based on community standards and in accordance with Title 15 of the California Code of Regulations. Services are provided at the Main Jail, Honor Farm, and Juvenile Justice Center (JJC) by CHS staff, contracted providers, and physicians from San Joaquin General Hospital (SJGH); and by Behavioral Health Services (BHS) staff at the JJC.

## Major Budget Changes

### Salaries & Employee Benefits

- \$842,936 Salary and benefits adjustments.
- \$158,523 Add a Mental Health Clinician I-II.
- \$140,592 Add a Business Analyst I-II.
- \$93,893 Add a Senior Psychiatric Technician.
- \$349,667 Increase in overtime due to experience.
- \$95,012 Increase in holiday pay due to experience.
- (\$93,893) Decrease in extra-help.



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### Services & Supplies

- \$293,150 Establish budget for annual maintenance and network consulting for new Electronic Health Record system (EHR).
- \$195,926 Increase in pharmaceutical costs.
- \$132,872 Increase in Health Care Services Administration allocated costs primarily due to additional staffing.
- \$62,400 Establish budget for medical records scanning.
- \$38,726 Increase in inpatient medical care.
- \$36,825 Furniture purchases for EHR project.
- \$33,750 Mobile devices and network infrastructure for EHR project.
- (\$30,970) Eliminate previously planned medical records upgrade project.
- (\$30,000) Decrease in lab costs.

### Centrally-Budgeted Expenses

- \$88,306 Increase in Medical Malpractice insurance costs.
- \$31,852 Increase in data processing charges.
- \$29,850 Purchase of new laptops on PC replacement program.
- \$34,168 Increase in Workers' Compensation and Casualty insurance costs.
- \$33,827 Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$975,000 EHR software.
- \$112,750 Network switch (11).
- \$15,000 VPN router.
- \$13,750 EKG machine (2).

### Expenditure Reimbursements

- \$744,157 Increase in reimbursement from the Community Corrections Partnership (CCP).

### Revenues

- \$42,500 Establish budget for Medication Assisted Treatment grant revenue.

## Program Discussion

The 2023-2024 recommended budget for Correctional Health Services (CHS) totals \$22,375,147, which is an increase of \$3,617,068 from the 2022-2023 adjusted budget.

### Jail Mental Health Screening and Assessments Stepping Up Initiative

CHS has provided behavioral health screening and assessment services in the Jail booking area since April 2018, staffed by Mental Health Clinicians, Mental Health Specialists, Licensed Vocational Nurses, and Psychiatric Technicians. This effort is aligned with the national “Stepping Up” initiative for which the Board adopted a resolution of support on May 24, 2016 (R-16-80).

An evidence-based universal screening and assessment tool known as the *Brief Jail Mental Health Screen* is utilized, along with a risk screen for self-harm. The goal is to screen every individual arriving for booking for behavioral health issues. This initial point of contact is critical for successful intervention and possible diversion to the proper treatment facility, thereby reducing the number of detained mentally ill individuals.

In July 2020, the CCP approved funding for three additional Mental Health Clinicians. These positions allow for expanded screening and assessment, covering 24 hours a day, 7 days per week. However, it has been difficult to fill the positions due to competitive demand and the extensive and lengthy Sheriff's Office background clearance, which results in a pass rate of less than 40%. To reduce delays in the background process CHS increased the number of contracted Sheriff's Office background investigators funded by and dedicated to CHS in 2021-2022.

Staff provides other services including case management, individual and group counseling, crisis management, and discharge planning services. In addition, staff follow-up with clients for up to 30 days following release from custody to ensure they have established contact with community-based organizations and to confirm follow-up care appointments have been provided as appropriate. This “warm handoff” to Behavioral Health Services (BHS) and community providers is expected to decrease stress experienced by clients in navigating the various service provider systems, improve connection to the various community-based resources, and ultimately help to reduce recidivism.

# 2022621000—Correctional Health Services

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The Proposed Budget includes the addition of a Mental Health Clinician I-II, funded through CCP, in order to further expand discharge planning and re-entry services. Warm handoffs to BHS and to the County's Whole Person Care program have continued to increase over the past several years with a focus on incarcerated persons with behavioral health or substance use issues, or those who are experiencing homelessness.

On December 15, 2021, the Health Care Services Agency coordinated with the Public Defender's Office, BHS, and the District Attorney's Office on a California Department of State Hospitals Pre-Trial Felony Diversion Program grant opportunity. The program aims to build a comprehensive diversion framework with multiple opportunities to intercept, engage, and divert individuals with serious mental illness away from the criminal justice system, while supporting the safety of the community.

### Jail-Based Competency Treatment (JBCT) Program

CHS, in partnership with the Sheriff's Office, implemented a JBCT Program in January 2020, funded by the Department of State Hospitals (DSH), to assist with the high number of court referrals for those designated Incompetent to Stand Trial (IST), requiring restoration treatment. The County's JBCT Program is unique compared to other County Jail programs as daily operations are managed by County employees as opposed to a contracted entity. The Program has achieved a 66% participant restoration success rate to date. During 2021, CHS negotiated a revised contract with DSH to increase capacity to serve up to 12 IST clients concurrently, up from 10 clients under the initial contract. This has provided needed County level IST capacity, given the potential discontinuance of admission of Lanterman Petris Short (LPS) Conservatees to DSH facilities in connection with the substantial IST patient waitlist.

### Early Access and Stabilization Services (EASS)

CHS has been invited to partner with DSH to facilitate the addition of EASS. DSH developed the EASS program to address the IST crisis in California. Based on the recommendations of the IST Solutions Workgroup, EASS programs act as front ends to existing JBCT programs and were developed for individuals found IST on felony charges and waiting in jail for admission to a DSH facility for competency restoration treatment. The goal of EASS is to initiate treatment at the earliest point possible for individuals on the IST waitlist. Services provided will include, but are not limited to, general mental health services, psychiatric services, competency education, coordination with DSH Patient Management Unit, IST re-evaluation services, and psychological evaluations. A fully staffed EASS program is composed of a Mental Health Clinician, Licensed Vocational Nurse or Psychiatric Technician, part-time Psychiatrist, and

part-time Psychologist. DSH plans to fully fund the program, however, it is not included in the 2023-2024 Proposed Budget, pending funding commitments.

### Specialty Courts

CHS's Mental Health Clinicians provide information to Superior Court to assist in determining how to proceed with mentally ill inmate court cases. Clinician attendance and participation in the Collaborative Courts has been valuable to the collaborative teams and judges. Clinicians provide teams with the current status of the inmate, medication compliance, treatment plan, and assistance in coordinating discharge planning with other agencies within the community. Clinicians have enhanced teams by bridging services within the jail and community partners, thus improving continuity of care, and helping to address the issue of recidivism in this population.

CHS staff spends approximately 110 hours per month preparing for, attending, and performing follow-up assignments for the various specialty courts, including the Mental Health, 1368 Calendar, Parole Re-Entry, Revocation Calendar, Veterans Treatment, Assembly Bill 109 Court, Compliance Court, DUI, and Drug Court.

### Medication Assisted Treatment (MAT)

MAT uses medication in combination with counseling and behavioral therapies for the treatment of substance use disorders. CHS started a MAT pilot program in October 2017, with initial funding from the CCP for inmates with co-occurring mental health and opioid use disorders. Several successful MAT patients have been released from custody and connected with community resources including SJGH, SJ Health Centers, and Community Medical Centers. MAT services continue to be offered in limited capacity to Jail inmates seeking help with substance use disorders. In February 2023, CHS was awarded \$85,000 in grant funding and was selected to participate in Health Management Associates' Learning Collaborative to promote best practices in substance use disorder treatment. MAT services may be further augmented under opportunities to provide Medi-Cal services to jail inmates up to 90 days prior to release under the California Advancing and Innovating Medi-Cal initiative, as well as possible support from national opioid settlement funds. The Proposed Budget includes \$42,500 in expenses and estimated revenues for the MAT grant.

### Hope Program – Administrative Separation Project

The Hope program has been in operation since March 2019. It targets incarcerated individuals identified as having behavioral health issues, but who were unable to program successfully within the general Jail population or who were placed in Administrative Separation due to capacity issues in

# 2022621000—Correctional Health Services

## Law & Justice

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the Jail's shelter or medical housing units. Since its implementation, the Program has helped reduce behavioral issues and improved the incarcerated persons' ability to participate in programs and services available in other locations throughout the Jail, while decreasing administrative separation placements for frequent users and increasing medication and program compliance.

Participants involved in the Hope Program are seen on a weekly basis by a Mental Health Clinician and will receive incentives for their participation and meeting program requirements. This Program has been fully implemented in both Administrative Separation units with the goal of expanding to the Shelter Unit once CHS achieves full staffing.

### **Serious Mental Illness (SMI) Behavior Modification Program**

Due to the influx of those incarcerated with (SMI), CHS continues to be innovative in providing essential mental health services. Through the Hope Program it became apparent the use of incentives paralleled with therapeutic contacts have positively impacted the inmate population. Most recently, a targeted behavior modification pilot program was implemented for the SMI population presenting on a range of impairment with non-adherence to their mental health treatment. CHS anticipates this pilot program will assist with improving adherence to psychiatric medications, increased interaction with mental health staff members, and decreased use of highly valued mental health resources such as BHS Psychiatric Health Facility placements and Riese (involuntary medication) hearings. During 2022-2023, enhanced structure and components were established to assess the pilot program's impact on the SMI inmate population.

### **Dental Services – Juvenile Justice Center**

CHS has historically paid for the use of a dental facility, a dentist, and a dental assistant to provide dental care for inmates. In 2020, CHS entered into an agreement with

Community Medical Centers (CMC) to provide dental services for Juvenile Justice Center youth. CMC bills the State's Denti-Cal program for those that qualify, saving the County General Fund approximately \$27,000 per fiscal year, as most of the juvenile population qualify for Denti-Cal coverage. These savings have allowed CHS to increase dental services at the main Jail and provide clinics four days per week.

### **Electronic Health Record**

In 2017, CHS adopted an ambulatory Electronic Health Record (EHR) system, which had been implemented within SJGH, and began converting paper documentation to a computer-based charting system. The current EHR provider has elected to discontinue correctional-specific components and will terminate software maintenance and support for the version currently utilized by CHS. This discontinuance will expose the Department to significant HIPAA compliance issues and negatively impact care delivery.

In response, CHS worked with the Purchasing Department to initiate the Request for Proposal (RFP) process for a new EHR system in November 2022. On April 11, 2023 the Board approved a five-year contract with the successful bidder, NaphCare Inc., for \$2.4 million, commencing July 1, 2023 (A-23-68).

The 2023-2024 EHR project budget is established for \$1,783,491, consisting of an augmentation of \$1,355,817 approved by the Board (B-23-165) and \$427,674 in funds reallocated within the Department's budget. This includes the addition of a Business Analyst I-II position to act as the administrative project manager and CHS' cost share of a Department Information Systems Analyst IV assigned to Health Care Services Administration. This budget also includes costs for software and software maintenance, professional implementation, mobile devices, PCs, equipment, furniture, and network infrastructure. The EHR replacement project is expected to increase efficiency, improve patient safety, and decrease litigation vulnerability.

# 2022621000—Correctional Health Services

## Law & Justice

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Health Assessments</b>	22,149*	17,348	25,176	19,426	20,326
<b>Kitchen Clearances</b>	7,615	3,910	7,552	6,082	6,840
<b>Registered Nurse Triage</b>	15,699	13,548	12,630	13,843	14,880
<b>Sick Call</b>					
<i>Mental Health Sick Call</i>	4,588	3,311	2,804	3,026	3,392
<i>Provider Sick Call</i>	2,047	1,654	2,171	2,380	2,500
<b>Clinic Visits</b>					
<i>Inmates to CHS Clinics</i>	2,660	2,942	2,852	2,515	2,690
<i>Inmates to Off-site Clinics</i>	1,268	1,501	1,220	1,126	1,175
<b>Hospital Visits</b>					
<i>Emergency Room Visits</i>	492	501	603	508	480
<i>Hospitalized Inmates</i>	81	90	119	92	96
<i>Number of Days Hospitalized</i>	270	347	483	315	328
<b>Mental Health</b>					
<i>Brief Jail Mental Health Screen</i>	7,379	7,634	9,467	9,623	9,750
<i>MH Clinician Assessments</i>	3,196	4,666	3,778	3,646	4,375
<i>MH Clinician Individual Therapy</i>	897	956	341	852	1,005
<i>MH Clinician Group Therapy</i>	854	2,185	2,660	1,986	2,576
<i>MH Clinician Collaborative Court</i>	386	1,429	2,942	2,924	2,987
<i>Psych. Tech./LVN Intake Assessments</i>	10,356*	9,985*	11,440	11,750	11,900
<b>Pharmacy</b>					
<i>Medication Passed</i>	915,322	1,025,652	943,832	998,388	999,852
<i>Prescriptions Filled</i>	45,231	43,522	40,664	39,945	40,320
*Restated					

# Summary – All Probation Budgets

## Law & Justice

Steve C. Jackson, Chief Probation Officer  
[www.sjgov.org/departments/prob](http://www.sjgov.org/departments/prob)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$40,846,452	\$54,670,322	\$61,014,151	\$61,014,151	\$6,343,829
Services & Supplies	21,503,359	29,444,532	33,375,586	33,375,586	3,931,054
Centrally-Budgeted Expenses	6,529,528	6,670,316	7,476,146	7,476,146	805,830
Other Charges & Uses	1,206,392	1,485,226	916,104	916,104	(569,122)
Capital Expenditures	128,443	442,601	1,887,400	1,887,400	1,444,799
Operating Transfers Out	12,538,076	15,214,951	17,915,239	17,915,239	2,700,288
Total Expenditures	\$82,752,250	\$107,927,948	\$122,584,626	\$122,584,626	\$14,656,678
Expenditure Reimbursements	(9,512,120)	(9,405,972)	(11,543,471)	(11,543,471)	(2,137,499)
Total Appropriations	\$73,240,130	\$98,521,976	\$111,041,155	\$111,041,155	\$12,519,179
<b>Earned Revenues By Source</b>					
Fines/Forfeitures/Penalties	\$6,655	\$0	\$0	\$0	\$0
Interest/Rents	154,638	151,279	661,323	661,323	510,044
Aid From Other Governments	67,212,544	70,967,053	78,226,712	78,226,712	7,259,659
Charges For Services	20,963	6,450	6,950	6,950	500
Miscellaneous Revenues	(7,159)	1,600	2,851	2,851	1,251
Operating Transfers In	650,426	517,254	1,352,975	1,352,975	835,721
Fund Balance	(7,429,310)	975,901	3,155,786	3,155,786	2,179,885
Total Revenues	\$60,608,757	\$72,619,537	\$83,406,597	\$83,406,597	\$10,787,060
<b>Net County Cost</b>	\$12,631,373	\$25,902,439	\$27,634,558	\$27,634,558	\$1,732,119
<b>Allocated Positions</b>	359.0	363.0	353.0	353.0	(10.0)
<b>Temporary (Full-Time Equivalent)</b>	32.0	36.9	35.0	35.0	(1.9)
<b>Total Staffing</b>	391.0	399.9	388.0	388.0	(11.9)

## Purpose

The Probation Department provides adult and juvenile probation services, including alternatives to detention and diversion services, and operates the juvenile detention and camp facilities.

This is a summary of the budgets administered by the Probation Department:

- |              |   |              |   |
|--------------|---|--------------|---|
| ➤ 2021200000 | Pretrial Services                         | ➤ 2022702510 | Local Community Corrections-AB 109        |
| ➤ 2022700000 | Juvenile Probation                        | ➤ 2022710000 | Justice Assistance Grant                  |
| ➤ 2022700190 | Juvenile Justice - Assembly Bill (AB) 109 | ➤ 2022745000 | Administration                            |
| ➤ 2022702000 | Adult Probation                           | ➤ 2022785000 | Juvenile Supplemental Law Enforcement Act |
| ➤ 2022702300 | Senate Bill 678                           | ➤ 2022800000 | Juvenile Detention                        |

# Summary – All Probation Budgets

## Law & Justice

Steve C. Jackson, *Chief Probation Officer*  
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### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Reduce the vacancy rate in active positions by 5%, with the exclusion of assignments in unpopulated housing units	21.9% as of March 2023	20.8% Department-wide	June 2024
Formalize Succession Planning	Current	Target	Deadline
➤ Provide additional professional growth training for departmental staff at all classifications	No formalized departmental program	Formalized internal leadership program and training opportunities	December 2023
Augment Digitization and Automation	Current	Target	Deadline
➤ Update the Adult Division Case Management System (CMS)	Utilize multiple platforms for various case managements tasks	Improving efficiency and streamlining case management systems	June 2025
Fiscal Optimization			
Maintain a Structurally Balanced Budget	Current	Target	Deadline
➤ Be at or below Net County Cost target, excluding salary savings, for allocated budgets each fiscal year	FY 22/23: \$28,184,282 FY 23/24: \$27,634,559 FY 24/25: TBD NCC Target	< \$28,184,282 < \$27,634,559 < NCC Target FY 24/25	June 30, 2023 June 30, 2024 June 30, 2025
Public Safety/Criminal Justice/Quality of Life			
Provide Adequate Resources for Public Safety and Criminal Justice	Current	Target	Deadline
➤ Reduce conviction rates by 10% for the AB 109 population, 3 years following release	48%	43.2%	June 2025
Homelessness			
Increase Permanent Supportive Housing	Current	Target	Deadline
➤ Reduce number of clients on probation experiencing homelessness by 5%	11.2%	10.6%	June 2025

#### Proposition 172

In 1993, Proposition 172 established a permanent Statewide half-cent sales tax to provide funding for qualifying public safety programs. Funds are collected by the State Board of

Equalization and apportioned to each county based on its proportionate share of Statewide taxable sales.

AB 2788 created a Maintenance of Effort (MOE) provision requiring cities and counties to maintain funding levels to

# Summary – All Probation Budgets

## Law & Justice

public safety programs that receive Proposition 172 funds. AB 2788 also established 1992-1993 as the MOE base year and required an adjustment to MOE levels based on the annual change in Proposition 172 revenues. In 1992-1993, the total for all qualifying budgets in the County was \$68,997,254 (base year).

The current program allocation formula for the County was established by the Board of Supervisors on May 24, 1994 (B-94-613), which allocates Proposition 172 revenue to the Sheriff (68.1%), Probation (13%), District Attorney (11%), and the Public Defender/Court Assigned Counsel (7.9%).

In 2022-2023, the MOE for all qualifying public safety programs was \$156,398,835. The County's adjusted AB 2788 Certification for 2022-2023 was \$270,750,814. Overall, the General Fund provided overmatching funds of \$114,351,979 to all qualifying public safety programs. Not all budgets are included for each public safety department.

The Probation Department's portion of the MOE was \$25.1 million. The chart below illustrates that County General funds provided approximately \$14.3 million above the required MOE for 2022-2023.

### Public Safety Fund (Proposition 172) – AB 2788 Maintenance of Effort

<i>Probation</i>	2022-2023 Adopted	AB 2788 Adjustments				Adjusted AB 2788	1992-1993 Base Year	Prop 172 MOE	Overmatch
		State/Federal Grant	Charges for Services	Trust Fund	Fixed Assets				
Pretrial Services	2,058,045	(300,000)	0	0	0	1,758,045	486,729	1,103,288	654,757
ADAP*	312,116	0	0	0	0	312,116	180,223	408,519	(96,403)
Juvenile	6,889,064	(1,074,225)	(5,700)	0	(100,000)	5,709,139	2,791,363	6,327,294	(618,155)
Adult	10,307,491	(733,183)	(750)	(143,524)	0	9,430,034	2,464,566	5,586,530	3,843,504
Administration	7,827,204	(2,978,798)	0	0	0	4,848,406	899,269	2,038,409	2,809,997
Juvenile Hall	20,167,785	(2,574,281)	0	0	(200,000)	17,393,504	4,257,141	9,649,832	7,743,672
<b>Total</b>	<b>47,561,705</b>	<b>(7,660,487)</b>	<b>(6,450)</b>	<b>(143,524)</b>	<b>(300,000)</b>	<b>39,451,244</b>	<b>11,079,291</b>	<b>25,113,872</b>	<b>14,337,372</b>

\*ADAP Program was consolidated in Substance Abuse Services Budget #4040600000 on July 1, 2018

# 2022700000—Probation-Juvenile

## Law & Justice

Steve C. Jackson, Chief Probation Officer  
[www.sjgov.org/departments/prob](http://www.sjgov.org/departments/prob)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$5,745,244	\$7,492,352	\$7,962,618	\$7,962,618	\$470,266
Services & Supplies	694,289	1,301,968	1,338,345	1,338,345	36,377
Centrally-Budgeted Expenses	830,772	595,865	707,479	707,479	111,614
Other Charges & Uses	200,928	210,104	110,104	110,104	(100,000)
Capital Expenditures	0	100,000	180,000	180,000	80,000
Operating Transfers Out	6,394,707	7,778,935	9,519,994	9,519,994	1,741,059
Total Expenditures	\$13,865,940	\$17,479,224	\$19,818,540	\$19,818,540	\$2,339,316
Expenditure Reimbursements	(1,908,343)	(2,811,225)	(2,876,215)	(2,876,215)	(64,990)
Total Appropriations	\$11,957,597	\$14,667,999	\$16,942,325	\$16,942,325	\$2,274,326
<b>Earned Revenues By Source</b>					
Interest/Rents	\$337	\$354	\$3,490	\$3,490	\$3,136
Aid From Other Governments	11,398,732	13,176,896	15,561,115	15,561,115	2,384,219
Charges For Services	0	5,700	5,700	5,700	0
Miscellaneous Revenues	563	500	500	500	0
Fund Balance	(119,456)	(173,638)	(355,923)	(355,923)	(182,285)
Total Revenues	\$11,280,176	\$13,009,812	\$15,214,882	\$15,214,882	\$2,205,070
<b>Net County Cost</b>	\$677,421	\$1,658,187	\$1,727,443	\$1,727,443	\$69,256
<b>Allocated Positions</b>	49.0	49.0	49.0	49.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	8.3	8.3	7.5	7.5	(0.8)
<b>Total Staffing</b>	57.3	57.3	56.5	56.5	(0.8)

## Purpose

The Juvenile Division of the Probation Department serves and assists the Court in matters concerning the supervision of juvenile offenders and performs other investigations as ordered. Actions are mandated by various sections of the Welfare and Institutions Code.

The Juvenile Division consists of the following units: Investigations, County Supervision, Placement, Central Support, Project 654, and Community Accountability and Prevention Services (CAPS).

The Juvenile Justice-Assembly Bill (AB) 109 budget (#2022700190) unit was established in 2020-2021. This Special Revenue Fund budget receives Probation's share of the monthly allocation from the State AB 109 2011 Realignment Fund designated to mitigate costs associated with the supervision of youth who return to the County after confinement in a California Department of Corrections and Rehabilitation (CDCR), Division of Juvenile Justice institution. It is projected this funding will remain for the next two fiscal years, to assist in the re-entry efforts of those who return to the County through June 30, 2023. This narrative combines budgets for Juvenile Probation (#2022700000) and Juvenile Justice-AB 109 (#2022700190).



# 2022700000—Probation-Juvenile

## Law & Justice

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$440,650 Salary and benefits adjustments.
- \$44,777 Increase in overtime costs.
- (\$15,161) Decrease in extra-help costs.

#### Services & Supplies

- \$45,000 Increase in small furniture costs at Juvenile Hall.
- \$39,375 Increase in fleet services costs.
- \$29,435 Increase in case management technical assistance costs.
- \$26,000 Increase in transportation and travel costs.
- \$22,332 Increase in Crossroads Program costs reimbursable through the Youthful Offender Block Grant (YOBG).
- (\$133,827) Decrease in contract services costs due to ending of Youth Reinvestment Grant (YRG).

#### Centrally-Budgeted Expenses

- \$43,721 Increase in Workers' Compensation and Casualty insurance costs.
- \$67,089 Cost Allocation Plan adjustment.

#### Other Charges

- (\$100,000) Decrease in Division of Juvenile Justice (DJJ) housing costs due to closure of DJJ facility.

#### Capital Expenditures - Equipment

*Probation Juvenile (#2022700000)*

- \$80,000 Vehicle.

#### Capital Expenditures - Structures and Improvements

*Probation Juvenile (#2022700000)*

- \$100,000 Carpet replacement.

### Operating Transfers Out

- \$1,727,004 Increase in pass-through funding of the YOBG portion of revenue from AB 118 Juvenile Justice Re-entry allocation to Juvenile Probation and Juvenile Detention.

### Expenditure Reimbursements

- \$29,350 Increase in reimbursement from the YOBG Fund for operating costs.
- \$22,512 Increase in reimbursement from the YOBG Fund for Crossroads Program costs.
- \$14,128 Increase in reimbursement from the Justice Assistance Grant for the violence reduction mission overtime costs.

### Revenues

- \$1,914,207 Increase in pass-through funding of the YOBG portion of revenue from the AB 118 Juvenile Justice Re-entry allocation.
- \$482,106 Increase in Proposition 172 funding.
- \$215,525 Increase in revenue from the San Joaquin County Office of Education for Project 654 operating costs.
- \$67,712 Increase in reimbursement from Title IV-E revenue for Senate Bill (SB) 933 foster care expenditures.
- \$36,282 Increase in reimbursement from Title IV-E revenue for Continuum of Care Reform due to reduced costs associated with Child and Family Team expenditures.
- \$18,838 Increase in reimbursement from Title IV-E revenue for Commercial Sexual Exploitation of Children (CSEC) expenditures.
- (\$182,285) Decrease in use of fund balance.
- (\$141,747) Decrease in reimbursement from the Youth Reinvestment Grant (YRG) due to grant ending in February 2023.

# 2022700000—Probation-Juvenile

## Law & Justice

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- (\$123,288) Decrease in reimbursement from Title IV-E revenue for foster care expenditures.
- (\$112,324) Decrease in State realignment tax funding.

### Program Discussion

The 2023-2024 recommended budget for Juvenile Probation and Juvenile Justice-AB 109 budgets total \$19,818,540, which is an increase of \$2,339,316 from the 2022-2023 adjusted budget.

#### Investigations Unit

Officers in the Investigations Unit prepare a Social History Report and make recommendations to the court regarding the disposition of juvenile cases. Officers in the Unit are also required to develop a case plan to identify needs and strengths of the youth and their family, and to identify services to address those needs. The Officers also conduct investigations when a youth appears to fall into Welfare and Institutions Code (WIC) Section 300 (dependency) and Section 602 (delinquency) systems and prepares a 241.1 WIC report for the court with recommendations to determine which system will best address the youth's needs. The court may order the Unit to complete other supplemental reports specific to a case, per WIC Section 281. The Unit is responsible for Deferred Entry of Judgment and Supplemental Reports as ordered by the court, as well as Transfer Reports required under Proposition 57.

#### County Supervision Unit

In fiscal year 2023-2024, the Department will reorganize the supervision of youthful offenders in the County, due to a continual reduction of youth placed on wardship. With legislative changes signed into law, more youth are eligible to participate in informal probation and Deferred Entry of Judgment. County Supervision Unit Officers and the youth they supervise will all fall under the Reconnect Unit (JSLEA Budget #2022785000). Although the Officers are being assigned to another unit, they will continue to provide delinquency prevention, crisis intervention, and supervision services. These Officers are currently assigned and housed at police departments in Tracy, Lathrop, and Lodi as well as at the One Reconnect School. Officers are responsible for assessing and reassessing youth using a validated risk assessment and developing and updating corresponding changes to the youth's case plan. Officers monitor compliance with the case plan and conditions of probation/court orders and file violations of probation when necessary. These Officers also continue to participate in Peacekeeper forums

and multi-agency operations targeting gangs and gang violence.

#### Placement Unit

The Placement Unit is mandated to provide for the care, custody, and control of youth if at disposition, the youth is ordered removed from their parent/guardian's custody and placed into foster care. A Probation Officer meets face-to-face with each youth in a Short-Term Residential Treatment Program (STRTP) or other out-of-home placement and with the parent/guardian monthly. When the youth returns from foster care or an STRTP, the Officer provides weekly supervision as the youth transitions back into the community. Youth in the Family Visions Wrap-Around Program have foster care or STRTP orders but are allowed to remain in the home while receiving intensive case management and mental health services.

AB 12 allows youth to voluntarily stay in foster care until age 21 as "non-minor dependents" when criteria for such benefit is met. Placement Unit Officers monitor the youth who choose to participate in AB 12 throughout the duration of their stay.

Continuum of Care Reform requires probation departments to make efforts to reduce the number of youth in out-of-home placement by placing them in foster homes with the goal of transitioning youth out of the STRTP to a lower level of care within six months.

On October 1, 2021, increased accountability and oversight for placement into an STRTP, as well as effective aftercare services, was implemented in California with the Families First Prevention Services Act Implementation Trailer Bill (AB 153). This includes the addition of a Qualified Individual (QI) report. The report utilizes a trauma-informed treatment model to determine appropriateness of an STRTP placement by ruling out lower levels of care. This determination must also happen for probation youth to ensure placement is consistent with the short- and long-term mental and behavioral health goals and permanency plan for the child.

Additionally, STRTPs are required to provide at least six months of aftercare services to children transitioning to a family-based setting. The Department will continue utilizing the Family Visions program that is currently in place to provide aftercare services to those transitioning to a family-based setting.

#### Central Support Unit

The Central Support Unit provides clerical support to the Juvenile Division. Staff establishes and maintains case files utilizing the Juvenile Justice Information System, processes violations of probation and bench warrants, compiles

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probation reports for Juvenile Court, and scans numerous documents into the Division's case management system.

### **Project 654**

Since 1994-1995, the Probation Department and the San Joaquin County Office of Education (SJCOE) have administered a cooperative program, Project 654, through its community schools program for at-risk youth. The program provides probation services to juveniles in an educational setting. SJCOE reimburses the Department for the cost of services.

### **Community Accountability and Prevention Services (CAPS)**

The CAPS program targets at-risk youth in the community and in schools before they enter the juvenile justice system.

The Crossroads Program involves Social Workers and community-based organizations providing evidence-based early intervention and prevention programs to at-risk youth to help them become independent and successful while preventing self-destructive and socially-negative behavior, such as substance abuse, delinquency, and family dysfunction.

Two other components of the CAPS program will be discontinued in fiscal year 2023-2024. The Youth Reinvestment Grant (YRG) program is open to youth under the age of 18, regardless of prior arrest history. The grant period began July 1, 2019 and ended February 28, 2023. Youth involved in this project will remain in treatment/services with the CAPS program. At-risk youth will continue to be referred to the Crossroads Program to meet the prevention and early intervention needs of youth and families.

The Community Accountability Boards (CABs) target at-risk youth having behavioral or disciplinary issues at school. The CABs did not meet during the COVID-19 pandemic and the program will end in fiscal year 2023-2024 due to the ending of the YRG.

### ***National Guard Discovery Challenge Academy***

The SJCOE contracts with the Probation Department for a full-time Social Worker position assigned to the Academy

program. This program is for youth between the ages of 16 and 19 who have dropped out of high school, or are at risk for dropping out. The program consists of a 22-week residential phase and a 12-month post-residential phase. The Social Worker works closely with students, mentors, parents, and faculty to ensure a positive and successful transition during the residential phase as well as after the cadet graduates and transitions to the next stage of their life.

### ***Juvenile Justice Realignment Senate Bill (SB) 823***

The Division of Juvenile Justice (DJJ) will close its facilities on June 30, 2023, and any remaining youth in custody will be transitioned back to local custody for care. As part of SB 823 and SB 92, a local plan was developed to address the needs of this population in custody. The plan included assigning a CAPS Social Worker to Detention Services to offer family engagement services on-site. The Social Worker is dedicated to fostering family engagement through counseling, repairing connections, and setting expectations and boundaries. To successfully transition youth back to their community and family, a team approach is taken with the Probation Department, Behavioral Health Services, Correctional Health Services, community-based organizations, and the youth's family. The Department began bringing youth back from DJJ in February 2023, and is scheduled to resolve the custody status of each youth prior to the end of fiscal year 2022-2023. The court has essentially three options with youth returning from DJJ. They can be returned to juvenile hall to complete their commitment and care, be released home under supervision, or be referred to the Pine Grove Youth Fire Camp, in Amador County. The Department is also serving seven youth in its Secure Youth Treatment Facility.

## **Fund Balance**

### ***Juvenile Justice AB 109***

In 2023-2024, the Juvenile Justice AB 109 Special Revenue Fund (#20053) will reimburse the costs of a Probation Officer II in the JSLEA budget (#2022785000) in the amount of \$195,921. As of March 31, 2023, the fund balance is \$535,894.

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### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Referrals</b>	1,653	1,224	1,072	1,027	1,016
<b>Referrals Diverted from System</b>	876	636	235	309	327
<b>New Wards</b>	182	128	169	120	108
<b>Investigations</b>	404	373	531	528	527
<b>Deferred Entry of Judgment/Informal</b>	58	103	97	43	30
<b>Caseload</b>					
<i>Regular Supervision</i>	77	41	40	76	74
<i>Minimum Supervision</i>	159	107	43	40	55
<i>Placement</i>	41	23	22	39	44
<i>Intensive Supervision/Family Vision</i>	13	7	4	11	12
<i>DJJ Returned Youth</i>	5	23	23	20	19
<i>Bench Warrant</i>	94	81	73	77	78
<b>Total Caseload</b>	389	282	205	263	282
<b>Community Accountability Boards</b>	5	5	17	33	0*
<b>Crossroads</b>	24	30	32	37	39
<b>Project 654</b>	867	667	826	1,058	1,116
<b>Discovery ChalleNGe Academy</b>	284	221	289	304	307
<b>Youth Reinvestment Grant</b>	N/A	9	43	34	0*

*\*The Youth Reinvestment Grant (YRG) ended in February 2023 and the Community Accountability Boards have not been held since the COVID-19 pandemic and with the YRG grant ending.*

# 2022702000—Probation-Adult & Pretrial Services

## Law & Justice

Steve C. Jackson, Chief Probation Officer  
[www.sjgov.org/departments/prob](http://www.sjgov.org/departments/prob)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$12,359,639	\$13,704,100	\$14,483,017	\$14,483,017	\$778,917
Services & Supplies	1,901,776	2,093,931	2,492,148	2,492,148	398,217
Centrally-Budgeted Expenses	581,246	1,115,861	1,139,433	1,139,433	23,572
Capital Expenditures	53,276	77,601	532,400	532,400	454,799
Total Expenditures	\$14,895,937	\$16,991,493	\$18,646,998	\$18,646,998	\$1,655,505
Expenditure Reimbursements	(3,146,693)	(3,150,874)	(3,575,754)	(3,575,754)	(424,880)
Total Appropriations	\$11,749,244	\$13,840,619	\$15,071,244	\$15,071,244	\$1,230,625
<b>Earned Revenues By Source</b>					
Fines/Forfeitures/Penalties	\$6,655	\$0	\$0	\$0	\$0
Interest/Rents	579	565	800	800	235
Aid From Other Governments	6,883,769	5,706,844	6,939,777	6,939,777	1,232,933
Charges For Services	20,963	750	1,250	1,250	500
Miscellaneous Revenues	3	0	51	51	51
Operating Transfers In	140,541	143,524	150,215	150,215	6,691
Total Revenues	\$7,052,510	\$5,851,683	\$7,092,093	\$7,092,093	\$1,240,410
<b>Net County Cost</b>	\$4,696,734	\$7,988,936	\$7,979,151	\$7,979,151	(\$9,785)
<b>Allocated Positions</b>	105.0	96.0	96.0	96.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	6.6	10.3	7.3	7.3	(3.0)
<b>Total Staffing</b>	111.6	106.3	103.3	103.3	(3.0)

## Purpose

This narrative combines budgets for Adult Probation (#2022702000), Adult Probation-SB 678 (#2022702300), and Pretrial Services (#2021200000).

The Adult Probation Division serves and assists the Court in matters concerning the supervision of adult offenders and performs other investigations as ordered. The Division is comprised of the following units: Investigations, Assessment, Proposition 36, Domestic Violence Field Supervision, Family Violence Field Supervision, Intensive Supervision Unit, Family Focused Intervention Team, and Central Support. Partial funding is received from the California Community Corrections Performance Incentive Act, otherwise known as Senate Bill (SB) 678.

The Pretrial Services Unit provides information to the court on defendants booked at the County Jail and is a major component in the management of the Jail population. This Unit processes and screens misdemeanors for possible release on citation and provides screenings for probable cause hearings on all non-warrant arrests. The Unit is responsible for locating, abstracting, and adding all outstanding warrants for California Highway Patrol and Sheriff's Office bookings.

# 2022702000—Probation-Adult & Pretrial Services

## Law & Justice

### Major Budget Changes

#### Salaries & Employee Benefits

- \$843,922 Salary and benefits adjustments.
- \$44,694 Increase in overtime costs.
- (\$109,699) Decrease in extra-help costs.

#### Services & Supplies

- \$177,639 Increase in system upgrade costs.
- \$135,149 Increase in pretrial monitoring costs.
- \$91,169 Increase in facilities lease costs.
- \$68,125 Increase in landscaping costs.
- \$40,000 Increase in contract service costs due to changes in accounting.
- \$33,768 Increase in rent and lease costs.
- (\$100,000) Decrease in professional service costs for mental health services.
- (\$23,750) Decrease in website design costs.
- (\$16,542) Decrease in dispatch service costs for two Communications Dispatchers II in the Sheriff's Communications budget (#202162200) due to changes in accounting.
- (\$10,000) Decrease in evaluation service costs.

#### Centrally-Budgeted Expenses

- \$12,161 Increase in Workers' Compensation costs.
- (\$23,988) Decrease in Casualty insurance costs.
- \$36,165 Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

##### *Probation Pretrial (#2021200000)*

- \$100,000 System furniture.
- \$40,000 Kiosk reporting system (2).

##### *Probation Adult (#2022702000)*

- \$342,400 System furniture (30).

#### Capital Expenditures - Structures and Improvements

##### *Probation Pretrial (#2021200000)*

- \$50,000 Carpet replacement.

#### Expenditure Reimbursements

- \$395,694 Increase in reimbursement from Local Community Corrections budget for Pretrial assessments and Adult operating costs.
- \$113,287 Increase in reimbursement from Local Community Corrections budget for Pretrial monitoring.
- (\$93,481) Decrease in reimbursement from the Project Navigate Constructive Change grant due to grant ending in June 2023.

#### Revenues

- \$476,886 Increase in Proposition 172 funding.
- \$371,896 Increase in Assembly Bill 1869 revenue.
- \$215,949 Increase in reimbursement from Superior Court Driving while Under the Influence (DUI) Court Program grant funding.
- \$95,881 Increase in SB 90 mandate claim funding.
- \$82,303 Increase in reimbursement from the California Community Corrections Performance Incentive Act Fund.
- \$20,893 Increase in trial court grant funding.
- (\$30,875) Decrease in public protection grant funding.

### Program Discussion

The 2023-2024 recommended budget for Adult Probation and Pretrial Services totals \$18,646,998, which is an increase of \$1,655,505 from the 2022-2023 adjusted budget.

#### Adult Division

The Adult Division is comprised of the following functional units:

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➤ **The Investigations Unit** prepares pre-plea and pre-sentence reports prior to sentencing felons and occasional misdemeanants, as well as Drug Court Reports and STATIC-99R (sex offender) assessments. The Unit manages the Proposition 63 Program (enacted in January 2018) that mandates the Probation Department to investigate defendants convicted of felonies and specified misdemeanors to determine if firearms are registered to them by checking the Automated Firearms System. The Unit is responsible to collect a Prohibited Persons Relinquishment form for defendants who do not have registered firearms as well as those who have relinquished their registered firearms verifying the firearms have been relinquished and the Automated Firearms System updated. Also, the Unit prepares a report for the court indicating whether the defendant has complied with the Proposition 63 requirements and provides appropriate paperwork to the Department of Justice (DOJ) resulting in a significant increase in workload.

➤ **The Assessment Unit** processes all new grants of formal probation, except for Proposition 36 cases, and processes incoming jurisdictional transfer cases. Officers assess the client's risk to re-offend by determining the appropriate level of supervision, terms and conditions of their probation, determine restitution, and conduct victim lethality assessments via the Ontario Domestic Assault Risk Assessment (ODARA).

An Officer is assigned to the County Jail to provide assessments to clients in custody that ultimately may assist them in transitioning back into the community.

➤ **The Family Violence Unit** provides an enhanced level of supervision to clients who score high/moderate risk based off the ODARA. The Unit also provides appropriate level of supervision to clients who score moderate or low risk to re-offend or have been transferred to a lower level of supervision after demonstrating satisfactory adjustment while on a higher level of supervision.

The Unit contains the Administrative Bank caseload for cases where the client has satisfactorily completed all terms and conditions of probation but owes victim restitution. This caseload also has clients whose jurisdiction remains in the County but is being supervised by another State.

The Unit is assigned to the unsupervised caseload, which is comprised of clients who have a low-risk score, except for domestic violence, child abuse, elder abuse, and sex offenses. The Unit also monitors clients with active warrants or misdemeanors, which owe outstanding restitution but are not being provided supervision services nor the Proposition 36 Officer.

➤ **The Intensive Supervision Unit** provides enhanced supervision to clients on probation for sex-related offenses. The sex offenders are assessed using the State-mandated STATIC-99R risk assessment. Clients with a high-risk score are monitored via Global Positioning System (GPS).

The Unit also has an Officer assigned to the Delta Regional Auto Theft Team, a collaboration of law enforcement agencies performing proactive activities to arrest auto theft offenders and combat auto thefts in the County.

➤ **The Domestic Violence Supervision Unit** is responsible for certifying domestic violence treatment providers and monitoring their compliance. Officers monitor attendance and completion of the mandated 52-week Batterer Intervention Programs and provide supervision services to domestic violence clients.

The Unit contains an Officer who represents the Department in court for Violation of Probation calendars. All clients supervised by the Unit attend the Programming Passport, a two-phased system of individualized programming designed to address criminogenic risks and needs of everyone. Once Phase Two is completed, clients are eligible to attend Department-sponsored Batterer Intervention Program classes.

➤ **The Central Support Unit** provides clerical support to the Division by establishing and maintaining case files, processing violations of probation, bench warrants, supplemental reports, scanning numerous documents into the County's case management system, and processing reports for the court. The Unit also compiles and submits mandated statistical reports to the DOJ.

### Collaborative Services

The Department continues to collaborate with other agencies to improve the delivery of services to the court, clients, and community. Adult Division Officers are involved in numerous Collaborative Courts, such as the Felony Drug Court, DUI Court, Accountability Court, and Veterans Treatment Court. Officers regularly participate in multi-agency missions and operations with other law enforcement agencies by conducting searches and bench warrant service operations. Officers represent the Department at a variety of community events and conduct presentations throughout the County. Additionally, the Adult Division continues to help maintain the Statewide DNA database at the County level by collecting DNA on qualifying offenders that have not yet had their samples collected.

In 2023-2024, the Department will continue to participate in the District Attorney's Office Edward Byrne Memorial

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Justice Assistance Grant (JAG), titled Project Navigate Constructive Change (PNCC). This grant is a prosecution-led diversion program that combines cognitive behavioral interventions, mentoring, navigation assistance, and vocational training with supervision and court monitoring. Successful participants are eligible to have time lessened, charges reduced, and/or records sealed. As part of this grant, two Officers, one paid through the PNCC grant, provide supervision, group programming, and case management with clients as they move through the Department's Passport Program. Dedicated Officers are necessary as some Passport Program activities must be specifically designed and offered to PNCC clients to avoid inappropriate mingling of individuals at different risk levels. Officers are also required to attend multi-disciplinary team meetings and present findings to the court as part of the diversion proceedings.

### Senate Bill (SB) 678

The Department receives SB 678 funds, which assist in providing evidence-based programming (EBP) resulting in a reduction of adult State prison commitments for violations of probation. The current formula allows for one-time General Fund money to sustain County efforts for 2023-2024. SB 678 requires the Department to identify and track specific outcome-based measures specified in legislation, and to allocate a minimum of 5% of allocated funding to data collection and evaluation of EBP programs and practices.

SB 678 funding is used to develop effective EBP throughout the County to meet the diverse needs of the community. Program development includes training staff, purchasing curricula and materials, and contracting with community-based organizations to provide EBP to probationers.

In 2023-2024, SB 678 funding will be used to operate the following:

- **The Adult Probation Day Reporting Center (DRC)** provides intensive rehabilitative services to moderate-high or high-risk clients. The DRC is a collaborative effort between the Probation Department, Victor Community Support Services, Behavioral Health Services, the Northern California Construction Training (NCCT), and the San Joaquin County Office of Education.

The DRC provides expanded EBP offerings, a phased program, and allows completion of the program within six months based on the client's participation. Additionally, clients in aftercare are referred to case management services to assist in the transition from the structured DRC to a lower level of supervision. The NCCT program uses a core-curriculum involving

classroom and hands-on instruction under the supervision of a journeyman carpenter. The NCCT vocational program is also available to other adult clients upon completion of Phase One of the Passport Program.

State funding to support SB 678 costs is received in the Probation SB 678 General Fund Special Account (#12108), which as of March 31, 2023, had a balance of \$1,152,466. Over the past two fiscal years, annual allocations have averaged \$2.7 million. For 2023-2024, the recommended budget includes \$1.6 million in SB 678 funding.

### Pretrial Services

Pretrial Services includes the following functional units:

- **The Pretrial Assessment Unit** interviews all eligible bookings and completes the Virginia Pretrial Risk Assessment Instrument (VPRAI). Staff verifies and provides information to the court regarding the defendant's community ties, residence information, family ties, employment/education information, failures to appear, financial status, prior record, risk assessment score, and recommendation regarding pretrial release. The Unit also provides information to Probation Officers for the purpose of placing violation of probation holds and networks with State and local law enforcement agencies.
- **The Pretrial Monitoring Unit** provides a continuum of services based on the offender's risk to re-offend and likelihood to appear in court. Services are based on risk, special needs, and court-ordered conditions and may include telephone reminder calls, office visits, individualized case management, drug testing, curfew restrictions, transdermal monitoring, and GPS monitoring. Offenders may also be referred to a variety of community-based organizations for other services including substance abuse services, mental health services, and EBP.

In July 2021, the Governor signed SB 129, amending the Budget Act of 2021, requiring a Statewide pretrial program be operated through the State judicial system funding the courts to enter into contracts with a county department. Both Superior Court and Probation are currently working together in an effort to enhance the current pretrial assessment and monitoring system. SB 129 does not allow for the supplanting of existing services and staffing. The total amount awarded to the County annually is \$1,253,873 from 2021-2022 through 2023-2024. Of that amount, 30%, or \$376,162 will be allocated to the court. The remaining balance of \$877,711 is available to the Probation Department. In 2023-2024, \$515,949 is budgeted in the Pretrial budget.



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Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Adult Division</b>					
<b>Referrals</b>					
Conditional Restitution	2,057	1,893	1,631	1,836	1,887
Domestic Violence	1,110	940	857	806	793
Drunk Driving	81	83	81	57	50
Proposition 36	163	61	55	58	59
<b>Reports to Court</b>					
Penal Code 1203(c)	540	456	820	509	431
Pre-Plea	35	24	16	14	13
Pre-Sentence	153	133	142	178	187
Static-99R	131	131	167	132	123
Supplementals/Memos	7,599	7,775	8,919	7,665	7,351
Violations of Probation	3,504	2,493	2,570	2,673	2,698
<b>Caseloads</b>					
Administrative Bank	107	63	61	47	43
Assessment (Intake)	593	309	419	440	445
Bench Warrant	3,535	3,591	3,742	3,714	3,708
Conditional Restitution	339	476	292	665	759
Domestic Violence	435	434	232	276	287
Transitional Aged Youth-AB109	55	45	49	64	68
Family Violence Unit	1,524	1,405	1,265	1,423	1,462
Proposition 36 Drug Oversight	136	43	31	51	56
Sex Offenders	143	134	94	101	103
Unsupervised	429	318	346	355	357
<b>Senate Bill 678</b>					
Reporting Center	20	20	18	18	20
Intensive Programming Unit	389	269	237	317	337
Supervision Referrals	1,079	977	995	945	932
<b>Pretrial Services</b>					
Risk Assessments Completed	6,324	6,507	6,039	5,201	4,992
Percent Released Pending Arraignment	8.7%	8.7%	12.6%	12.1%	12%
Citation Release Evaluations	3,604	3,033	2,789	2,758	2,750
Total Citation Releases/Percent	2,956/82%	2,596/85%	2,493/89%	2,139/78%	2,051/75%
Probable Cause Hearings	2,159	2,284	1,889	1,603	1,531
Pretrial Monitoring Unit Caseload	652	615	691	598	575

# 2022702510—Probation-Local Community Corrections

## Law & Justice

Steve C. Jackson, Chief Probation Officer

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Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$6,393,108	\$9,206,361	\$9,871,329	\$9,871,329	\$664,968
Services & Supplies	14,514,502	19,760,985	22,809,501	22,809,501	3,048,516
Centrally-Budgeted Expenses	1,339,649	936,858	1,284,643	1,284,643	347,785
Operating Transfers Out	5,843,671	7,436,016	8,395,245	8,395,245	959,229
Total Expenditures	\$28,090,930	\$37,340,220	\$42,360,718	\$42,360,718	\$5,020,498
Expenditure Reimbursements	(433,508)	(419,552)	(431,564)	(431,564)	(12,012)
Total Appropriations	\$27,657,422	\$36,920,668	\$41,929,154	\$41,929,154	\$5,008,486
<b>Earned Revenues By Source</b>					
Interest/Rents	\$153,340	\$150,000	\$656,783	\$656,783	\$506,783
Aid From Other Governments	34,801,298	36,396,938	37,760,562	37,760,562	1,363,624
Miscellaneous Revenues	(11,189)	0	0	0	0
Operating Transfers In	339,938	373,730	1,006,839	1,006,839	633,109
Fund Balance	(7,625,965)	0	2,504,970	2,504,970	2,504,970
Total Revenues	\$27,657,422	\$36,920,668	\$41,929,154	\$41,929,154	\$5,008,486
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	47.0	56.0	56.0	56.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	2.3	3.0	3.0	3.0	0.0
<b>Total Staffing</b>	49.3	59.0	59.0	59.0	0.0

## Purpose

The 2011 Public Safety Realignment Act also known as Assembly Bill (AB) 109, transferred responsibility for supervising specified lower-level inmates and parolees from the State to counties. AB 109 requirements are implemented in each county through a Community Corrections Partnership (CCP) previously established by Senate Bill (SB) 678. The CCP is charged with developing a plan of implementation and oversight of the public safety realignment process. The San Joaquin County Public Safety Realignment Plan coordinates activities among several County agencies, Superior Court, local law enforcement, and various community-based organizations.

Funding for AB 109 activities is provided through the County budget to the Probation Department, Sheriff's Office, and other agencies. This narrative describes the Local Community Corrections services provided by the Probation Department.

## Major Budget Changes

### Salaries & Employee Benefits

- \$179,480 Transfer a Management Analyst III from Probation Administration (#2022745000).
- (\$320,847) Transfer a Deputy Chief Probation Officer to Probation Administration (#2022745000).
- \$68,181 Increase in overtime costs.
- \$738,154 Salary and benefits adjustments.

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## Law & Justice

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### Services & Supplies

- \$1,107,008 Increase in contract service costs provided by community-based organizations.
- \$869,506 Increase in allocation to Correctional Health Services.
- \$785,296 Increase in allocation to Superior Court for Post-Release Community Supervision (PRCS) and Violent Offender program.
- \$678,540 Increase in allocation to Behavioral Health Services (BHS).
- \$223,464 Increase in allocation to Pretrial Assessments and Monitoring.
- \$55,698 Increase in allocation to Employment and Economic Development Department (EEDD).
- \$46,461 Increase in allocation to District Attorney.
- \$32,606 Increase in allocation to Public Defender.
- \$26,636 Increase in communications costs.
- (\$578,625) Decrease in reserves for special projects.
- (\$255,141) Decrease in drug and alcohol treatment costs.

### Centrally-Budgeted Expenses

- \$86,479 Increase in Workers' Compensation and Casualty insurance costs.
- \$36,007 Increase in data processing charges.
- \$212,087 Cost Allocation Plan adjustment.

### Operating Transfers Out

- \$1,119,991 Increase in operating transfers to the Sheriff's Office.
- (\$160,762) Decrease in operating transfers to the Local Innovation Subaccount Fund (#20110).

### Revenues

- \$2,966,400 Increase in State funding for Local Community Corrections.
- \$2,504,970 Increase in use of fund balance.
- \$506,783 Increase in interest income.
- (\$1,607,617) Decrease in Public Safety Realignment growth funds.

### Operating Transfers In

- \$633,109 Increase in funding for supervision of early-release offenders.

## Program Discussion

The 2023-2024 recommended budget for Local Community Corrections (AB 109) totals \$42,360,718, which is an increase of \$5,020,498 from the 2022-2023 adjusted budget.

For 2023-2024, Public Safety Realignment funding has been allocated by the CCP for 39 programs and services totaling \$39.7 million.

In 2023-2024, the Probation Department will utilize AB 109 funding for the following:

### High-Risk Unit (HRU)

The HRU supervises clients deemed to be high-risk for re-offending. The HRU consists of Probation Officers operating in two-Officer teams whose main function is to monitor client's activities through field visits. Field visits can occur at home, work, school, or treatment locations. Clients are also required to regularly report in person to their assigned Probation Officer. Officers are responsible for conducting assessments, making program referrals, developing case plans, monitoring clients' progress, and are trained in the principles of effective correctional interventions and cognitive behavioral curricula. The HRU employs an evidence-based programming design that mimics the programming offered at the Day Reporting Center (DRC).

The HRU staff participate in Firearms Reduction Consortium missions with Stockton Police, Sheriff's Office, and the District Attorney's Office; Sheriff's Safe Holiday sweeps; Lodi Police Safe Summer missions; and Operation Ceasefire call-ins and follow-ups.

Another Officer supervises offenders assigned to the PRCS Court. This program is based on the evidence-based Drug Court model and serves clients who have significant drug and

# **2022702510—Probation-Local Community Corrections**

## **Law & Justice**

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alcohol issues. The Officer works closely with the Court, Case Manager, and BHS to develop and monitor an integrated case plan.

An Officer is assigned to supervise offenders in the Mandatory Supervision Court. Supervision begins while the client is in custody, assessing risk of re-offending and support needs prior to being released, linking to services, and transitioning services after the offender appears in court.

### **Violent Crimes Unit (VCU)**

The VCU was created in response to the significant number of AB 109 clients assessed as being high-risk to re-offend for further violent acts. Operating similar to the HRU, the two-Officer teams conduct field and office visits with potentially violent offenders to monitor their activities and verify compliance.

An Officer supervises clients assigned to the Monitoring Court. This program is based on the Drug Court model and serves clients who are at high-risk for committing a violent act, have not been performing satisfactorily on community supervision, and would benefit from additional monitoring by the Court.

An Officer is assigned to work with other law enforcement agencies on the CCP Task Force. The Task Force assists the Department in conducting compliance checks and actively searching for wanted clients.

### **Transitional Aged Youth Unit (TAY)**

The TAY Unit was created to address the needs of 18 to 25 year-old clients deemed to be high-risk for re-offending. This cross-divisional Unit is designed to provide added support and supervision for at-risk young adults including, but not limited to, mental health, education, job training and assistance, and cognitive behavioral programming. Officers assigned to the Unit are trained in the principles of effective correctional interventions and cognitive behavioral curricula.

### **Intensive Programming Unit (IPU)**

The Intensive Programming Unit (IPU) supervises high-risk felony offenders. Officers conduct monthly visits both in the office and at clients' homes to monitor compliance with court-ordered conditions of probation. An Offender Needs Guide is completed for each client to determine criminogenic needs and targeted interventions. Clients participate in the Programming Passport to address their criminogenic needs.

This Unit also supervises high-risk offenders who participate in the Drug Court process. Working in collaboration with BHS and the court, enhanced supervision is provided and probationers appear weekly in court to provide updates to the judge on their progress.

### **Assessment Center**

Clients referred to the Assessment Center are those released from State prison or County Jail that are under community supervision by the Department. Probation Officers assigned to the Assessment Center assess the client's risk to re-offend, develop a case plan identifying individual needs, determine the appropriate level and type of supervision, and refer to appropriate evidence-based programs and/or supportive services to assist in transition back into the community and rehabilitation efforts. An Officer is assigned to the County Jail to assess clients in custody, in order to develop a plan for a seamless transition back into the community. The Center continues video conferences with AB 109 clients who are housed in prisons throughout the State in an effort to improve the transition (warm hand-off) from State prison to community supervision.

The Assessment Center, in partnership with BHS, Human Services Agency, and the Employment and Economic Development Department, serves as a hub for the comprehensive delivery of services to clients. It allows Officers to complete risk/needs assessments and provide intake decisions that incorporate multi-disciplinary team screening and assessment, decrease duplication of services between agencies, and facilitate multi-agency background sharing and record checking. Each of the partner agencies housed in the Assessment Center provides program-specific assessments to determine the client's level of readiness to receive appropriate services. The multi-agency agreements and rapport built among the agency participants overcome many of the traditional roadblocks to information sharing, and provide a continuum of care with immediate services and supervision.

### **Administrative Support**

Responsibilities for the direct administrative services of AB 109 funds include oversight and management of all County AB 109 programs, developing contracts, paying and tracking expenditures, procuring equipment, data collection, required reporting, fiscal oversight, composing Board letters, monitoring contracts for fiscal and programmatic compliance, overseeing the CCP, collecting and tracking recidivism information, and overseeing the programs that supervise and provide services to the AB 109 clients.

## **Fund Balance**

### **Local Community Corrections Special Revenue**

As of March 31, 2023, the Local Community Corrections Special Revenue Account Fund (#20051) balance was \$61,071,170. The 2023-2024 recommended budget includes \$2,504,970 in funding to be used for operating costs.

# 2022702510—Probation-Local Community Corrections

## Law & Justice

### Workload Data

		<del>Actual</del>		Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>Post-Release Community Supervision</i>					
<i>Referrals</i>	561	465	559	538	533
<i>Local Community Supervision</i>					
<i>Referrals (split sentences only)</i>	106	114	108	105	104
<i>Assessment Center Cases</i>	283	166	205	222	226
<i>High-Risk Unit Cases</i>	264	194	201	225	231
<i>Day Reporting Center Cases</i>	84	112	75	32	21
<i>Violent Crimes Unit Cases</i>	276	258	348	434	456
<i>Transitional Age Youth Unit Cases</i>	55	45	49	64	68

# 2022702510—Probation-Local Community Corrections

## Law & Justice

2023-2024 Public Safety Realignment Funding Programs/Services			
Organization	Actual 2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<i>Pretrial Assessment and Monitoring</i>	\$2,786,927	\$2,651,938	\$2,851,732
<b>Sheriff's Office</b>			
<i>Jail Beds</i>	3,786,670	5,136,477	5,840,408
<i>Jail Programming</i>	337,739	505,193	657,792
<i>Alternatives to Incarceration</i>	276,175	346,777	400,754
<i>Bailiffs</i>	181,546	284,091	341,510
<i>AB 109 Support</i>	949,998	965,403	1,117,468
<b>Probation Department</b>			
<i>High-Risk Unit</i>	1,483,846	2,061,790	2,194,480
<i>Violent Crimes Unit</i>	1,466,363	1,792,092	1,919,250
<i>Transitional Age Youth Unit</i>	204,340	218,031	378,457
<i>Assessment Center</i>	800,596	931,860	1,040,568
<i>Day Reporting Center</i>	664,825	737,489	697,203
<i>Evidence-Based Programming</i>	144,613	184,320	215,520
<i>Correctional Health Services</i>	2,807,108	3,860,097	4,401,908
<i>Behavioral Health Services</i>	1,064,401	1,254,658	1,760,650
<i>Employment and Economic Development Department</i>	654,831	856,157	911,855
<i>Transportation (Probation)</i>	6,400	26,000	22,000
<i>Global Positioning Satellite (Probation)</i>	14,630	32,230	16,590
<b>Human Services Agency</b>			
<i>Eligibility Screening</i>	129,297	138,074	153,675
<i>Transitional Housing</i>	236,070	296,999	312,600
<b>Superior Court</b>			
<i>Post-Release Supervision Court</i>	677,077	1,061,502	1,112,571
<i>Mandatory Supervision Court</i>	52,909	66,284	63,681
<i>Monitoring Court</i>	663,408	888,416	884,730
<i>Community Corrections Partnership Task Force</i>	1,301,624	1,683,570	1,935,298
<i>Friends Outside</i>	190,500	340,455	411,345
<i>Community Partnership for Families</i>	179,184	219,832	518,487
<i>El Concilio</i>	241,195	332,157	648,958
<i>District Attorney (Parole Revocation Process)</i>	364,145	385,395	431,856
<i>Public Defender (Parole Revocation Process)</i>	326,718	366,059	398,665
<i>San Joaquin Community Data Co-Op</i>	152,902	166,163	166,023
<i>Community Partnership for Families (CalFresh E&amp;T)</i>	127,664	264,593	292,428
<i>Mary Magdalene Community Services (Probation)</i>	179,074	215,909	614,904
<i>Public Defender (Uptrust)</i>	80,000	83,000	83,000
<i>Ready to Work (Homelessness and Recidivism Prevention)</i>	478,362	625,748	999,999
<i>InkOff Me</i>	16,000	21,000	21,000
<i>Transdermal Monitoring</i>	462,604	441,891	348,750
<i>Health Care Services (Homeless Initiative)</i>	50,000	50,000	55,000
<i>Probation Department (Intensive Programming Unit)</i>	0	1,728,380	1,852,305
<i>Probation Department (Cost Allocation Plan)</i>	877,868	408,650	620,737
<i>Probation Department (AB 109 Administrative Services)</i>	2,393,593	2,765,478	3,045,458
<b>Total Distribution of Funds</b>	<b>\$26,811,202</b>	<b>\$34,394,158</b>	<b>\$39,739,615</b>

# 2022745000—Probation-Administration

## Law & Justice

Steve C. Jackson, *Chief Probation Officer*  
[www.sjgov.org/departments/prob](http://www.sjgov.org/departments/prob)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$3,548,904	\$4,414,255	\$4,961,556	\$4,961,556	\$547,301
Services & Supplies	672,007	1,232,885	1,168,998	1,168,998	(63,887)
Centrally-Budgeted Expenses	1,923,228	2,245,652	2,471,103	2,471,103	225,451
Total Expenditures	\$6,144,139	\$7,892,792	\$8,601,657	\$8,601,657	\$708,865
Expenditure Reimbursements	(84,313)	(65,588)	(241,611)	(241,611)	(176,023)
Total Appropriations	\$6,059,826	\$7,827,204	\$8,360,046	\$8,360,046	\$532,842
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$3,722,008	\$3,874,478	\$3,969,998	\$3,969,998	\$95,520
Total Revenues	\$3,722,008	\$3,874,478	\$3,969,998	\$3,969,998	\$95,520
<b>Net County Cost</b>	\$2,337,818	\$3,952,726	\$4,390,048	\$4,390,048	\$437,322
<b>Allocated Positions</b>	18.0	22.0	22.0	22.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	6.7	6.6	6.6	6.6	0.0
<b>Total Staffing</b>	24.7	28.6	28.6	28.6	0.0

## Purpose

The Probation-Administration budget funds management and support services for the Probation Department's four functional divisions: Juvenile Probation, Adult Probation, Juvenile Detention, and Local Community Corrections (AB 109). Services provided include budgeting, accounting, personnel, training, planning/research, information systems, and grants management. The Chief Probation Officer function and responsibilities are mandated by California Government Code Sections 24000, 27770, 27771, and 27772; Welfare and Institutions Code Sections 270 and 271; and Penal Code Sections 1203.5 and 1203.6.

## Major Budget Changes

### Salaries & Employee Benefits

- \$380,935 Salary and benefits adjustments.
- \$320,847 Transfer a Deputy Chief Probation Officer from Probation Local Community Corrections (#2022702510).
- (\$179,480) Transfer a Management Analyst III to Probation Local Community Corrections (#2022702510).
- \$25,000 Increase in overtime costs.

### Services & Supplies

- \$56,600 Increase in training costs.
- \$33,200 Increase in tuition costs.
- \$29,336 Increase in software licensing costs.
- \$25,000 Increase in new chaplaincy program costs.
- \$21,292 Increase in building repair costs.
- \$15,000 Increase in uniform costs.
- (\$185,000) Decrease in furniture and equipment costs due to deferral of relocation into basement of Canlis Building.

# 2022745000—Probation-Administration

## Law & Justice

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- (\$40,000) Decrease in COVID-19 costs.
- (\$25,000) Decrease in range master costs.
- (\$20,000) Decrease in law enforcement taser equipment costs.
- (\$10,000) Decrease in psychiatric exam costs.

### Centrally-Budgeted Expenses

- \$106,150 Increase in data processing charges.
- \$84,250 Increase in Workers' Compensation and Casualty insurance costs.
- \$13,466 Increase in rents and leases of automation equipment.
- \$13,413 Increase in radio maintenance costs.

### Expenditure Reimbursements

- \$176,023 Increase in reimbursement from the Local Community Corrections budget for a portion of senior management positions.

### Revenues

- \$133,540 Increase in Proposition 172 funding.
- \$12,676 Increase in Board of State and Community Corrections funding for training.
- (\$50,696) Decrease in reimbursement from the Juvenile Camp Funding (JPCF) program.

## Program Discussion

The 2023-2024 recommended budget for Probation-Administration totals \$8,601,657, which is an increase of \$708,865 from the 2022-2023 adjusted budget.

The Probation Department continues to be the Court's most used alternative to incarceration for criminal offenders. Over the past decade, the profile of the typical juvenile and adult client supervised has changed as a result of the utilization of validated risk and needs assessment tools. Probation Officers

now supervise clients with the highest risk of re-offending. The Department continues to work aggressively to develop and maintain a probation service model that is evidence-based, employs best practices in the field of community corrections, and follows the principles of effective intervention.

In 2022-2023, the Department anticipated moving personnel into the basement floor of the Canlis Building. The Department appropriated \$240,000 for this move, which included new furniture purchases, technology, and the relocation and assembly of workstations for Department officers and staff. After working with the General Services Division, this move was not recommended in 2022-2023. Relocating an existing County partner to another site was not financially feasible. In 2023-2024, the Department plans to look at the unused and underutilized space currently occupied in the Canlis building and develop a strategy to better utilize the space. Given the change in strategy, the initial cost estimates from 2022-2023 will decrease by an estimated \$185,000.

### Chaplaincy Program

In 2023-2024, the Department has budgeted \$25,000 for a new chaplaincy program. In previous years, during department ceremonies or traumatic events, the Department utilized Chaplains from the Stockton Police Department. Chaplains who choose to work with law enforcement agencies are trained to communicate with individuals dealing with all types of situations and backgrounds, and would provide an added resource to the Probation Department. The Department has installed a Peer Support Team, and a Department Chaplain would further assist in the needs of all Department sworn and non-sworn personnel.

The costs associated with installing a Chaplain to the Department include equipment and training for the individual. The work of a Chaplain remains a volunteer position; it is not anticipated the Department would need to add a position in the future.

### Standards & Training for Corrections

Standards and Training for Corrections governs the training requirements for Probation Officers and Detention Officers. Probation Officer Core training is 189 hours and Juvenile Detention Officer Core training is 168 hours. A 69-hour core training is offered for staff that have previously attended Juvenile Detention Officer Core training and are going to become Probation Officers.



## 2022745000—Probation-Administration

### Law & Justice

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#### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Staff Trained</b>	205	195	194	198	205
<b>Standards &amp; Training for Corrections</b>					
<i>Classes Provided</i>	272	292	291	290	290
<i>Hours Provided</i>	22,700	14,476	20,005	17,060	16,500

# 2022785000—Juvenile Supplemental Law Enforcement Act

## Law & Justice

Steve C. Jackson, Chief Probation Officer

[www.sigov.org/departments/prob](http://www.sigov.org/departments/prob)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,793,735	\$3,621,170	\$3,943,135	\$3,943,135	\$321,965
Services & Supplies	250,080	275,970	324,873	324,873	48,903
Centrally-Budgeted Expenses	131,476	161,430	165,206	165,206	3,776
Other Charges & Uses	650,000	600,000	700,000	700,000	100,000
Capital Expenditures	20,705	65,000	0	0	(65,000)
Total Expenditures	\$3,845,996	\$4,723,570	\$5,133,214	\$5,133,214	\$409,644
Expenditure Reimbursements	(23,367)	(6,970)	(2,000)	(2,000)	4,970
Total Appropriations	\$3,822,629	\$4,716,600	\$5,131,214	\$5,131,214	\$414,614
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$3,402,634	\$3,567,061	\$3,928,554	\$3,928,554	\$361,493
Operating Transfers In	169,947	0	195,921	195,921	195,921
Fund Balance	250,048	1,149,539	1,006,739	1,006,739	(142,800)
Total Revenues	\$3,822,629	\$4,716,600	\$5,131,214	\$5,131,214	\$414,614
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	22.0	21.0	21.0	21.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	1.5	1.5	0.0	0.0	(1.5)
<b>Total Staffing</b>	23.5	22.5	21.0	21.0	(1.5)

## Purpose

The Juvenile Supplemental Law Enforcement Act (JSLEA), formerly known as the Juvenile Justice Crime Prevention Act (JJCPA), provides funding for community-based programs that reduce crime and delinquency among at-risk youth and young offenders. Funding is provided primarily from State Vehicle License Fee revenue and distributed to counties by statutory formula. In San Joaquin County, the JSLEA provides funding for the following programs:

- Reconnect Unit
- Neighborhood Service Centers
- Family Focused Intervention Team
- Continuous Quality Improvement/Programming Unit
- Transitional Age Youth Unit

# 2022785000—Juvenile Supplemental Law Enforcement Act

## Law & Justice

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$369,887 Salary and benefits adjustments.
- \$14,147 Increase in overtime costs.
- (\$62,069) Decrease in extra-help costs.

#### Services & Supplies

- \$25,383 Increase in fleet services costs.
- \$11,836 Increase in juvenile counseling services costs.
- \$11,344 Increase in facility lease costs.

#### Centrally-Budgeted Expenses

- \$8,078 Increase in Workers' Compensation and Casualty insurance costs.
- (\$5,028) Decrease in radio maintenance costs.

#### Other Charges

- \$100,000 Increase in contribution to Neighborhood Service Centers.

#### Revenue

- \$361,493 Increase in State funding.
- (\$142,800) Decrease in use of fund balance.

#### Operating Transfers In

- \$195,921 Increase in operating transfer from State Division of Juvenile Justice AB 109 Special Revenue Fund (#20053).

### Program Discussion

The 2023-2024 recommended Juvenile Supplemental Law Enforcement Act (JSLEA) budget totals \$5,133,214, which is an increase of \$409,644 from the 2022-2023 adjusted budget.

#### Reconnect Unit

The Reconnect Unit offers an alternative to incarceration at Juvenile Hall. San Joaquin County Office of Education operates the One Reconnect School. Officers supervise youth

attending the school and provide daily evidence-based programming curricula designed to reduce recidivism in youth. The Unit also offers supervision services to high schools throughout the local school districts under the assignment Probation Officers on Campus (POOC). These Officers are assigned to schools in a program modeled after successful programs across the nation and includes the assignment of Juvenile Probation Officers to a school site in order to supervise wards attending the school. These Officers have contact with youth who have not yet entered the juvenile justice system but are determined to be at-risk. Officers provide intensive supervision, monitor attendance, handle disciplinary problems, and work with school staff to ensure mental health, substance abuse, and other relevant issues are addressed. By working closely with school personnel, Officers can provide both supervision and support to help students avoid anti-social behavior. In 2022-2023, the Probation Department continued to see a decline in the number of youth placed on wardship for supervision, while Informal and Deferred Entry of Judgment cases continued to rise. Therefore, in 2023-2024, the Department's County Supervision Unit Officers will combine with the Reconnect Unit to provide juvenile supervision to the County under one unit at the One Reconnect School site.

#### Neighborhood Service Centers (NSC)

The NSC program is operated by the San Joaquin Community Partnership for Families. NSCs co-locate services and support, providing opportunities for families in underserved, high-risk neighborhoods. The effort focuses on reducing the number of youths that ultimately come to the attention of the juvenile justice system and other "high-end" social services systems.

Each of the five NSCs serve a geographic area of 15,000-20,000 residents. Centers feature a wide range of services and activities such as integrated service teams, food pantries, recreation programs, after school tutoring, and income tax assistance.

#### Neighborhood Service Center Locations

1. Diamond Cove II Family Resource Center, Stockton
2. Dorothy L. Jones Family Resource Center, Stockton
3. Lodi Family Resource Center, Lodi
4. Tracy Family Resource Center, Tracy
5. Villa Monterey Family Resource Center, Stockton

The 2023-2024 recommended budget includes a total of \$700,000 in JSLEA funding for the NSCs, which is a \$100,000 increase from the 2022-2023 adjusted budget. The funding will be used in 2023-2024 to continue operation of the centers, fund a mobile NSC, provide services at the Day

# **2022785000—Juvenile Supplemental Law Enforcement Act**

## **Law & Justice**

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Reporting Center, and provide referrals for clients diverted from the court process. The \$100,000 increase is due to the Department referring more probationers to NSCs in an effort to provide probationers and their families accessibility to programs and services within their own communities. The increased number of referrals and increased volume of programs offered, coupled with the increased cost of conducting business, has resulted in the anticipated overall increase in contribution amount.

### **Family Focused Intervention Team (FFIT)**

FFIT Officers provide wraparound case management services to parents who are under probation jurisdiction and where significant risk factors exist for youth in the home. The program goal is to intervene in these high-risk families to prevent/reduce violence in the home by providing case management services and evidence-based programming to directly address family needs. The long-term program goal is to positively impact these at-risk children, thus preventing their ultimate entry into the juvenile justice system. The program assists clients in providing an appropriate environment in which to raise children and remain crime-free, while offering appropriate supervision and support to these high-risk families. Targeted families include those that suffer from mental illness, substance abuse issues, and/or homelessness.

### **Continuous Quality Improvement/Programming (CQI) Unit**

The Department is continuing to develop the CQI unit, which is aimed at addressing evidence-based programming needs of clients, ensuring program fidelity, and measuring the quality assurance of programming. The Unit partners with the Juvenile Detention staff, Day Reporting Center, Assembly Bill (AB) 109 units, Victor Community Support Services, Behavioral Health, and contract community-based organizations. A Probation Unit Supervisor and Probation Officer III are assigned to the Unit. As additional officers complete the Field Training Program, the Department will be able to fill the Unit's line-level vacancies.

### **Transitional Age Youth (TAY) Unit**

The TAY Unit is designed to provide added support and supervision for at-risk young adults including, but not limited to, mental health, education, job training and assistance, and cognitive behavioral programming. Officers assigned to the Unit are trained in the principles of effective correctional interventions and cognitive behavioral curricula.

This Unit provides a vast array of services to meet the population needs. A Probation Unit Supervisor and two Probation Officer I-II positions are funded from JSLEA. The Unit also includes a Probation Officer I-II funded through AB 109.

The Juvenile Justice-AB 109 Officer supervises youth paroled from the Division of Juvenile Justice. The Officer also supervises youth between the ages of 18 through 25 years released from the Secure Youth Treatment Facility, related to Juvenile Justice Realignment. In 2023-2024, the Department expects to transfer another officer to this unit from another unit in JSLEA based on the release assumptions from the closure of the Division of Juvenile Justice.

## **Fund Balance**

### **Juvenile Supplemental Law Enforcement Fund**

As of March 31, 2023, the Juvenile Supplemental Law Enforcement Special Revenue Fund balance (#20052) was \$5,288,284. The 2023-2024 recommended budget includes the use of \$1,006,739 in the JSLEA fund balance.

### **Juvenile Justice – AB 109 Fund**

In 2023-2024, the Juvenile Justice AB 109 Special Revenue Fund (#20053) will reimburse the costs of a Probation Officer in the JSLEA budget in the amount of \$195,921. As of March 31, 2023, the fund balance is \$535,894.

# 2022785000—Juvenile Supplemental Law Enforcement Act

## Law & Justice

Workload Data					
	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Reconnect Unit</b>					
<i>Average Caseload Size</i>					
<i>Bear Creek High School</i>	1	1	2	0	1
<i>Cesar Chavez High School</i>	1	2	3	1	1
<i>Edison High School</i>	6	5	2	2	5
<i>Franklin High School</i>	2	1	1	5	6
<i>Jane Fredrick Continuation</i>	1	0	1	2	2
<i>Kimball High School</i>	1	1	0	0	0
<i>Liberty High School</i>	0	0	0	0	1
<i>Lincoln High School</i>	1	1	1	1	1
<i>Lodi High School</i>	1	0	0	0	1
<i>Plaza Robles High School</i>	3	0	0	0	0
<i>Ronald E. McNair High School</i>	2	1	6	4	4
<i>Stagg High School</i>	7	4	4	4	4
<i>Stockton Unified Alternative Schools</i>	1	0	0	0	0
<i>Tokay High School</i>	1	1	1	0	1
<i>Tracy High School</i>	2	1	0	1	2
<i>Tracy Unified Alternative Schools</i>	4	1	0	2	3
<i>Village Oak High School</i>	0	0	0	0	1
<i>West (Merrill) High School</i>	3	2	0	0	1
<i>Weston Ranch High School</i>	1	2	0	0	2
<i>County Office of Education</i>	33	35	34	33	45
<i>Miscellaneous (Youth in Transition)</i>	25	8	10	2	10
<b>Total</b>	<b>96</b>	<b>66</b>	<b>65</b>	<b>57</b>	<b>91</b>
<i>Informal/Deferred Entry of Judgment</i>	51	50	75	80	160**
<i>Intakes Processed</i>	25	23	1	3	10
<i>Walk-In Contacts</i>	110	10	0*	36	36
<b>Reconnect Day Reporting Center</b>					
<i>Average Daily Population</i>	14	17	12	12	12
<b>Family Focused Intervention Team</b>					
<i>Average Caseload Size</i>	113	110	101	142	152
<b>Transitional Age Youth</b>					
<i>Average Caseload Size</i>	5	7	44	42	42
*Walk-in statistics were not collected in 2021-2022 due to the COVID-19 pandemic. The statistics are being collected again in 2022-2023.					
**Informal/Deferred Entry of Judgment cases are estimated to double due to combining the County Supervision Unit with the Reconnect Unit.					

# 2022800000—Probation-Juvenile Detention

## Law & Justice

Steve C. Jackson, *Chief Probation Officer*

[www.sigov.org/departments/prob](http://www.sigov.org/departments/prob)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$9,997,809	\$16,072,245	\$19,633,055	\$19,633,055	\$3,560,810
Services & Supplies	3,293,699	4,557,722	5,016,196	5,016,196	458,474
Centrally-Budgeted Expenses	1,722,315	1,614,459	1,708,282	1,708,282	93,823
Other Charges & Uses	355,464	675,122	106,000	106,000	(569,122)
Capital Expenditures	54,462	200,000	1,175,000	1,175,000	975,000
Operating Transfers Out	299,698	0	0	0	0
Total Expenditures	\$15,723,447	\$23,119,548	\$27,638,533	\$27,638,533	\$4,518,985
Expenditure Reimbursements	(3,915,896)	(2,951,763)	(4,416,327)	(4,416,327)	(1,464,564)
Total Appropriations	\$11,807,551	\$20,167,785	\$23,222,206	\$23,222,206	\$3,054,421
<b>Earned Revenues By Source</b>					
Interest/Rents	\$357	\$360	\$250	\$250	(\$110)
Aid From Other Governments	6,885,172	7,863,926	9,681,740	9,681,740	1,817,814
Miscellaneous Revenues	3,464	1,100	2,300	2,300	1,200
Total Revenues	\$6,888,993	\$7,865,386	\$9,684,290	\$9,684,290	\$1,818,904
<b>Net County Cost</b>	\$4,918,558	\$12,302,399	\$13,537,916	\$13,537,916	\$1,235,517
<b>Allocated Positions</b>	118.0	119.0	109.0	109.0	(10.0)
Temporary (Full-Time Equivalent)	6.6	7.2	10.6	10.6	3.4
Total Staffing	124.6	126.2	119.6	119.6	(6.6)

## Purpose

Section 850 of the Welfare and Institutions Code mandates counties to provide a juvenile detention hall that it not be connected with any jail or prison; and that it be managed and controlled by the Chief Probation Officer.

Peterson Juvenile Hall is San Joaquin County's youth detention facility. The facility is operated by the Probation Department and provides humane and secure care of youth whose cases are pending disposition in the Juvenile Court. Peterson Juvenile Hall also serves as one of the Department's Secure Youth Treatment Facilities as mandated by Section 875 of the Welfare and Institutions Code. Probation also operates a Juvenile Camp (Camp Peterson), Electronic Monitoring, and Home Supervision Programs.

The Juvenile Detention budget funds the operation of the Juvenile Hall, Camp Peterson, In-Custody Assessment/Court Transportation Unit, and Youth Advocacy Unit.

## Major Budget Changes

### Salaries & Employee Benefits

- \$2,571,409 Salary and benefits adjustments.
- \$85,131 Add a Storekeeper I position.

- (\$1,005,976) Delete eight Juvenile Detention Officer positions.
- (\$289,944) Delete two Juvenile Detention Unit Supervisors positions.
- (\$77,074) Delete a Stock Clerk II position.

# 2022800000—Probation-Juvenile Detention

## Law & Justice

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- \$2,033,357 Increase in overtime costs.
- \$243,907 Increase in extra-help costs.

### Services & Supplies

- \$253,626 Increase in contract services, communication, technology, clothing, and miscellaneous expenses for youth programming costs.
- \$229,166 Increase in utilities costs.
- \$179,559 Increase in food service contract and laundry costs.
- \$151,443 Increase in tutoring service costs.
- (\$190,000) Decrease in COVID-19 testing costs.
- (\$166,350) Decrease in design and facility professional services costs.

### Centrally-Budgeted Expenses

- \$82,835 Increase in Workers' Compensation and Casualty insurance costs.
- \$22,004 Increase in radio maintenance charges.
- \$12,587 Increase in data processing charges.
- (\$23,603) Cost Allocation Plan adjustment.

### Other Charges

- (\$569,622) Reduction in housing costs to California Department of Corrections and Rehabilitation, due to closing of State DJJ facilities.

### Capital Expenditures - Equipment

- \$300,000 Surveillance system.
- \$200,000 Juvenile Hall contraband detection.
- \$75,000 Vehicle.

### Capital Expenditures - Structures and Improvements

- \$250,000 Juvenile Hall flooring replacement.
- \$250,000 Gym flooring replacement.
- \$50,000 Security fencing.
- \$25,000 Landscaping at Camp Peterson.
- \$25,000 Landscaping at Dream Center.

### Expenditure Reimbursements

- \$1,460,664 Increase in reimbursement from the Youthful Offender Block Grant (YOBG) for operating expenditures.

### Revenues

- \$895,625 Increase in State Division of Juvenile Justice (DJJ) realignment funding.
- \$788,650 Increase in Proposition 172 funding.
- \$145,741 Increase in reimbursement from the Juvenile Probation Camp Funding for operating costs.

## Program Discussion

The 2023-2024 recommended budget for Juvenile Detention totals \$27,638,533, which is an increase of \$4,518,985 from the 2022-2023 adjusted budget. In 2023-2024, a Storekeeper I position is recommended in order to meet the needs within the Probation Department, offset by the deletion of a Stock Clerk II position.

Juvenile Hall's Board of State and Community Corrections' rated capacity is 179 beds, however, Juvenile Hall is funded for 120 beds. The anticipated average daily population is currently 59 beds, with a projected ADP of 61 in 2023-2024. As a result, in 2023-2024, the Department is eliminating 8 long-term vacant Juvenile Detention Officer and 2 Juvenile Detention Unit Supervisor positions for a total of 10 deleted positions, in addition to the Stock Clerk II position. It is expected if the population dramatically increases, the Department would be allowed to expeditiously receive these staff positions back.

# 2022800000—Probation-Juvenile Detention

## Law & Justice

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### Senate Bill 823

On September 30, 2020, the Governor signed Senate Bill (SB) 823, which realigns youth traditionally committed to the California Department of Corrections and Rehabilitation DJJ, to local jurisdictions. This legislative reform closed intake at DJJ on July 1, 2021, with some exceptions to continue to allow youth eligible for transfer hearings to be placed in DJJ. The Governor's budget directed DJJ to have a final closure date of June 30, 2023.

In July 2021, oversight was established through the Office of Youth and Community Restoration (OYCR) within Health and Human Services and requires OYCR to evaluate the efficacy of local programs being utilized for realigned youth and report findings no later than July 1, 2025. Additionally, it adds a new State-level ombudsman to receive complaints from wards and families and tries to resolve those complaints.

Funding establishes the Juvenile Justice Realignment Block Grant program with Statewide funding set for 2022-2023 through 2024-2025 at \$121.4 million, \$199.2 million, and \$211.9 million, respectively. The DJJ realignment allocation to the County is \$3,477,211 in 2022-2023; \$5,785,151 in 2023-2024; and \$6,160,840 in 2024-2025. County distributions are updated annually based on updated total eligible DJJ population and County age population of 10 to 17 years old.

In 2023-2024, the Department anticipates utilizing \$3,097,530 of the \$5,785,151 allocation and placing the remaining portion of \$2,687,621 in the Juvenile Justice Realignment Block Grant General Fund Special Account (#12110). As of March 31, 2023, the fund balance was \$2,189,641.

This funding requires the establishment of a juvenile advisory body, a subcommittee of existing Juvenile Justice Groups, to develop and implement the funding. In 2021-2022, the first year of implementation, the Board of Supervisors considered the plan on May 4, 2021 (B-21-274) designed by the Probation Department when allocating the Juvenile Justice Realignment Block Grant. In subsequent fiscal years, the OYCR shall review the plan to ensure it meets statutory requirements.

### Juvenile Camp Program

Camp Peterson is a structured residential program that serves as an alternative to out-of-home placement, and for youth serving a commitment by the Court. Camp Peterson has also been identified to serve youth committed to the Secure Youth Treatment Facility as mandated by Section 875 of the Welfare and Institutions Code (W&IC). The Program is housed in a two-dormitory, minimum-security facility adjacent to Juvenile Hall with a rated capacity of 45 beds. The Program

promotes the values and rewards of self-discipline, accountability, responsibility, tolerance, respect, sobriety, physical and academic education, vocation, basic life skills, and hard work. In 2021-2022, the Department redeveloped the camp recreation yard, so that youth committed to the facility would have viable exercise options. Youth assigned to the Greater Valley Conservation Corps have also been able to participate in a portion of the landscape work. This Program has three goals:

1. Provide a secure, intensive, evidence-based treatment program for youth.
2. Reduce recidivism.
3. Provide high-quality, intensive aftercare services that support community and family reunification/stability. The Program is based on a Cognitive-Behavioral Therapy model, using the Programming Passport, with a focus on targeting criminogenic risk factors through cognitive restructuring and skill acquisition.

### Intake & Court Transportation Unit

The Unit reviews all admissions/bookings and citations received from law enforcement agencies in accordance with mandates in the W&IC. The Unit utilizes the evidence-based Detention Risk Assessment Instrument to determine if youth should remain detained or be released from custody. The Unit is also responsible for conducting assessments on out-of-custody citations received from local law enforcement. As a result of the Positive Achievement Change Tool risk assessment, youth will be diverted out of the system or referred to court. The Unit also oversees the informal probation program and refers cases to the prosecuting attorney for the filing of a petition with the Juvenile Court, if necessary. Officers are required to develop a case plan to identify the youth and their family's strengths and needs, and to identify services to address those needs.

The Unit is responsible for population management at Juvenile Hall. This includes assessing all youth for eligible releases and where appropriate, requesting modifications with the Juvenile Court to utilize detention alternatives such as Home Supervision/House Arrest, Global Positioning System (GPS), and the Work Project Program. These functions are critical in ensuring the County remains in compliance with regulations and Juvenile Hall's rated and operational capacity.

The Unit is responsible for monitoring high-risk youth being transported to adult court, or medical and dental appointments. These high-risk transports require multiple armed Probation Officers, as well as Juvenile Detention Officers, to accompany and supervise the youth.



# 2022800000—Probation-Juvenile Detention

## Law & Justice

### Vocational Educational Programs

In 2023-2024, the Department will continue its contract with the San Joaquin County Office of Education (SJCOE) for the local Conservation Corps' vocational educational program with Camp Peterson youth to learn about irrigation, landscape installation, and maintenance.

The Department offers a culinary vocational educational program, forklift certification, coding, and logistics. The goal is to prepare youth for employment as they transition back into the community.

### Youth Advocacy Unit

The Youth Advocacy Unit ensures essential and mandated services are provided in a timely, unbiased, consistent, and effective manner. Staff serve as Due Process and Grievance hearing officers and members of the Use of Force Review Committee. Staff coordinate weekly meetings to discuss concerns involving youth exhibiting behavioral or disciplinary issues. Institutional Assessment and Case Plans are prepared for each youth detained over 30 days with re-assessments conducted every six months or when a

significant event occurs in the youth's life. Additionally, staff assist in developing aftercare re-entry plans and transitional plans when youth are released back into the community.

The Unit, in collaboration with Victor Community Support Services, is responsible for facilitating various cognitive behavioral group sessions throughout all the housing units and for providing evidence-based programming to long-term youth at Juvenile Hall and Camp Peterson based on individual criminogenic needs.

Staff monitors all pre-dispositional youth placed on GPS or Home Supervision/House Arrest as an alternative to incarceration. This Unit also oversees the Behavior Management System (an incentives and awards program). The Unit coordinates the use of the Dream Center where youth earn weekly and monthly privileges of participating in a variety of fun recreational activities, including video games, painting, gardening, and craft projects.

In collaboration with the SJCOE, the Unit operates "The Book Nook" library inside Juvenile Detention. The Unit facilitates regular access for all youth in an effort to encourage reading and improve literacy.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Juvenile Hall</b>					
<i>Average Daily Population (ADP)</i>	63	63	51	59	61
<i>Admissions</i>	651	664	594	570	564
<i>Average Length of Stay (Days)</i>	38	49	30	24	23
<i>Average Length of Stay (Days)</i>					
<i>Youth Found Unfit for Juvenile Court</i>	380	650	663	851	595
<i>Commitments (% of ADP)</i>	27%	15%	27%	25%	26%
<i>Secure Youth Track</i>	N/A	N/A	1	7	7
<b>Juvenile Camp Program</b>					
<i>Average Daily Population</i>	16	17	9	10	10
<i>Total Detention Facilities ADP</i>	79	80	60	69	71
<b>Electronic Monitoring</b>					
<i>Regular Average Daily Caseload</i>	21	18	18	15	15
<b>Home Supervision</b>					
<i>Regular Average Daily Caseload</i>	1	5	5	6	7
<i>N/A= data not collected</i>					

# Justice Assistance Grant

## Law & Justice

Steve C. Jackson, Chief Probation Officer  
[www.sjgov.org/departments/prob](http://www.sjgov.org/departments/prob)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$8,013	\$159,839	\$159,441	\$159,441	(\$398)
Services & Supplies	177,006	221,071	225,525	225,525	4,454
Centrally-Budgeted Expenses	842	191	0	0	(191)
Total Appropriations	\$185,861	\$381,101	\$384,966	\$384,966	\$3,865
<b>Earned Revenues By Source</b>					
Interest/Rents	\$25	\$0	\$0	\$0	\$0
Aid From Other Governments	118,931	380,910	384,966	384,966	4,056
Fund Balance	66,063	0	0	0	0
Total Revenues	\$185,019	\$380,910	\$384,966	\$384,966	\$4,056
Net County Cost	\$842	\$191	\$0	\$0	(\$191)

## Purpose

The Edward Byrne Memorial Justice Assistance Grant (JAG) program is a Federal grant administered by the California Board of State and Community Corrections. JAG funds are allocated annually by legislative formula to local governments and are intended to help combat crime and improve public safety. The County and City of Stockton receive a combined funding allocation and are required to participate in a joint planning process to determine use of the grant funds. The recommended budget reflects only the County agencies' share of the overall JAG allocation. The County receives annual JAG funding in the following budgets:

- 2020225000 District Attorney (DA)
- 2021654000 Sheriff
- 2022710000 Probation
- 2023024000 Centralized JAG

## Major Budget Changes

### Services & Supplies

- \$49,852 Increase in labor costs for Probation.
- (\$45,398) Decrease in labor costs for DA.

### Revenues

- \$4,056 Increase in reimbursement from the City of Stockton.

## Program Discussion

The 2023-2024 recommended Edward Byrne Memorial Justice Assistance Grant (JAG) budget totals \$384,966; however, the actual amount received by County departments will depend on the outcome of discussions with the City of Stockton that are anticipated to occur late in 2023. In 2023-2024, Cost Allocation Plan costs are no longer charged to the JAG budget units.

Since 2011, the County and City of Stockton have used annual JAG funding for a Countywide Firearms Reduction Consortium, including DA, Sheriff, Probation, and Stockton Police. The intent of the partnership has been to coordinate activities that combat gun violence, with funding allocated for prosecution of gun/gang violence, overtime costs for gun

# ***Justice Assistance Grant***

## ***Law & Justice***

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enforcement, airplane fuel costs, and a firearms examiner/equipment.

As of this writing, 2023 JAG allocation amounts have not been announced. Discussions to be held between County departments and the City of Stockton will provide direction on recommended funding allocation amounts to each of the agencies and the viability of continued participation in the Countywide Firearms Reduction Consortium.

The budget assumes funding will be allocated to County departments similar to the 2022-2023 funding levels. Once the allocations are determined and after a consensus has been developed among the participating agencies regarding use of the funds and allocation amounts, a Memorandum of Understanding will be presented to the Board of Supervisors and Stockton City Council for consideration and approval of the 2023 JAG award.



ADOPTED BUDGET

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*Roads and Facilities*

# Roads & Facilities

## Appropriations

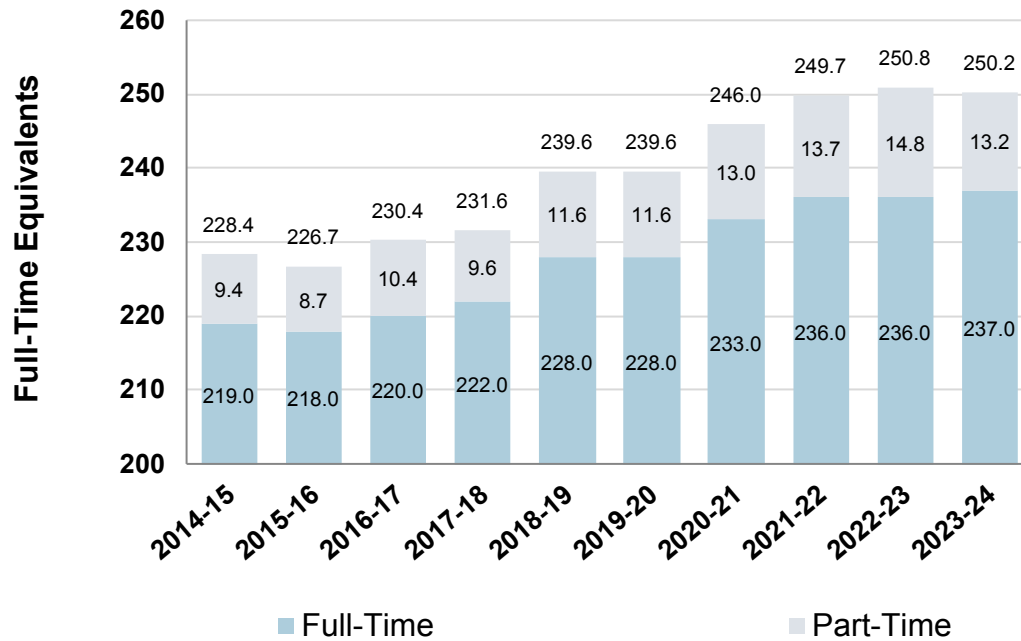
	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Summary — All Public Works Budgets</b>	E-4				
<b>Public Works</b>					
3030101000 Administration	E-7	\$4,230,423	\$5,680,806	\$5,680,806	\$1,450,383
3030103000 Engineering	E-10	14,966,870	16,544,537	16,544,537	1,577,667
3030105000 Road Maintenance	E-14	20,678,054	23,117,108	23,117,108	2,439,054
3030106000 Construction	E-18	37,823,500	49,986,500	49,986,500	12,163,000
3030108000 Public Services	E-21	1,050,481	1,169,961	1,169,961	119,480
2023060000 Water Resources	E-24	0	0	0	0
2023070000 Delta Activities	E-32	730,000	730,000	730,000	0
3030900000 Community Infrastructure Engineering	E-34	30,000	30,000	30,000	0
<b>Road Districts</b>					
3031300000 Road District #1	E-36	985,127	1,618,750	1,618,750	633,623
3031400000 Road District #2	E-36	980,602	588,577	588,577	(392,025)
3031500000 Road District #3	E-36	1,957,001	1,479,102	1,479,102	(477,899)
3031600000 Road District #4	E-36	8,895,442	7,265,109	7,265,109	(1,630,333)
3031700000 Road District #5	E-36	3,266,579	3,924,196	3,924,196	657,617
3039900000 Community Infrastructure Program	E-38	3,037,000	2,685,000	2,685,000	(352,000)
<b>Summary — All Airport Budgets</b>	E-40				
9230901000 Airport Enterprise Fund	E-42	5,979,726	6,209,325	6,209,325	229,599
9231000000 Airport Capital Projects	E-46	20,674,254	8,770,524	8,770,524	(11,903,730)
<b>Total - Roads &amp; Facilities</b>		<b>\$125,285,059</b>	<b>\$129,799,495</b>	<b>\$129,799,495</b>	<b>\$4,514,436</b>

## Roads & Facilities

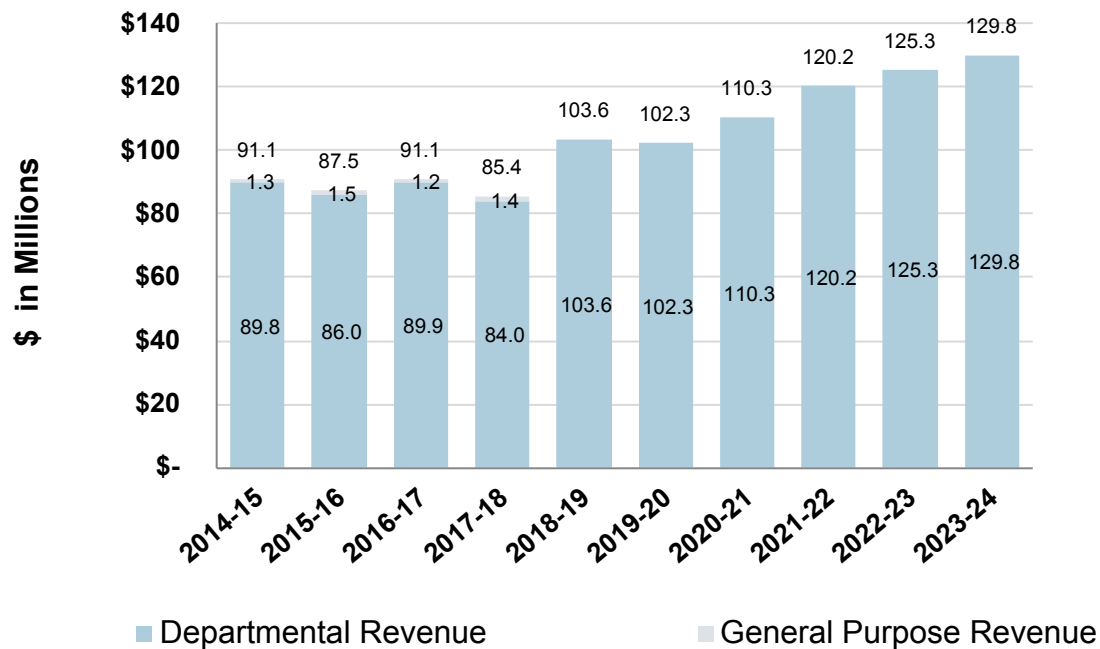
### Appropriations

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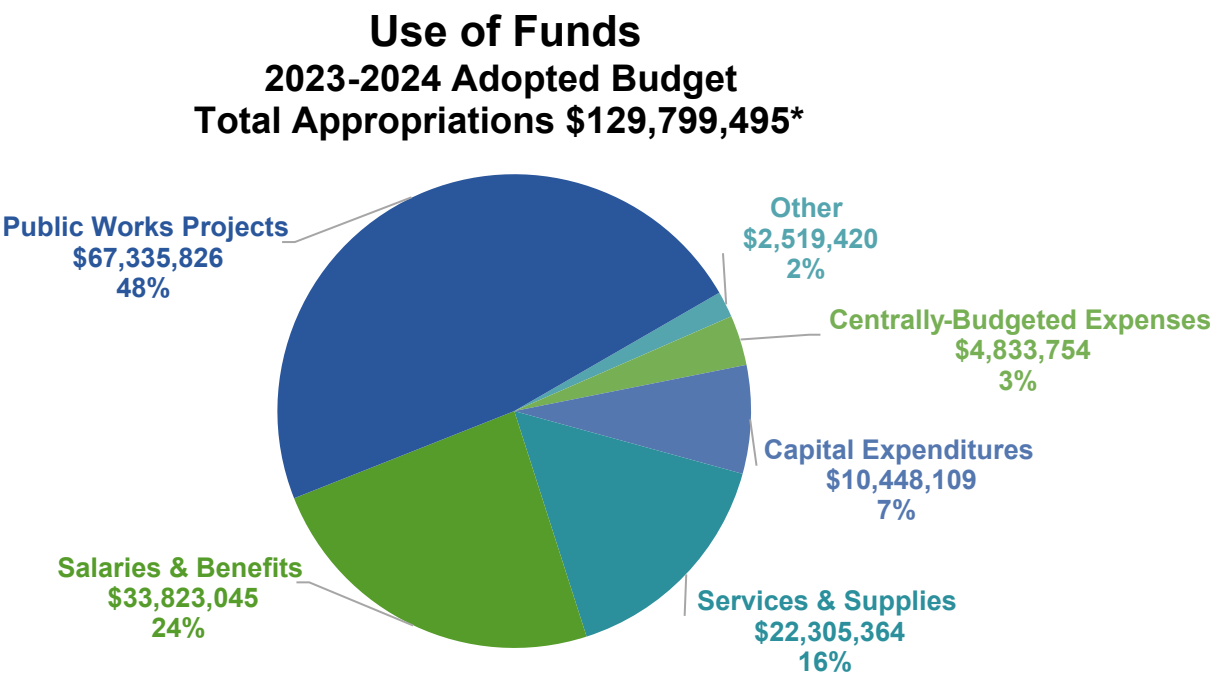
#### Staffing Trend



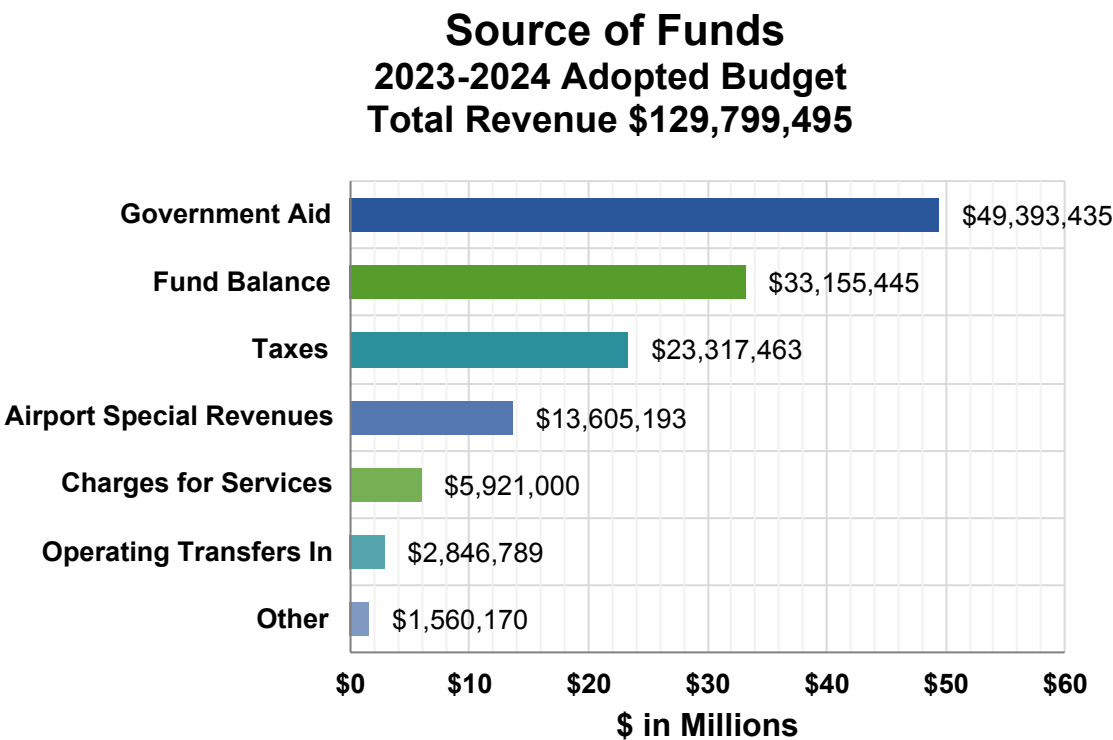
#### Appropriations by Source



Roads & Facilities  
Appropriations



\* \$141,265,518 Expenditures less \$11,466,023 Cost Reimbursements



# Summary

## All Public Works Budgets

Fritz Buchman, Public Works Director  
[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$39,009,155	\$46,305,303	\$51,292,937	\$51,292,937	\$4,987,634
Services & Supplies	34,138,104	47,889,350	51,936,240	51,936,240	4,046,890
Centrally-Budgeted Expenses	5,139,071	5,946,566	5,741,643	5,741,643	(204,923)
Other Charges & Uses	2,564,289	1,133,835	929,335	929,335	(204,500)
Capital Expenditures	2,044,123	3,443,400	4,218,002	4,218,002	774,602
Operating Transfers Out	523,974	669,890	1,163,000	1,163,000	493,110
Loan to Other Funds	0	1,530,000	1,530,000	1,530,000	0
Public Works Project Expense	25,154,461	56,043,565	67,335,826	67,335,826	11,292,261
Total Expenditures	\$108,573,177	\$162,961,909	\$184,146,983	\$184,146,983	\$21,185,074
Expenditure Reimbursements	(16,946,873)	(24,178,619)	(24,544,517)	(24,544,517)	(365,898)
Total Appropriations	\$91,626,304	\$138,783,290	\$159,602,466	\$159,602,466	\$20,819,176
<b>Earned Revenues By Source</b>					
Taxes	\$24,546,504	\$23,522,458	\$23,317,463	\$23,317,463	\$204,995)
Licenses/Permits/Franchises	124,977	176,160	144,000	144,000	(32,160)
Interest/Rents	508,185	495,000	1,757,650	1,757,650	1,262,650
Aid From Other Governments	35,016,499	54,680,361	49,698,501	49,698,501	(4,981,860)
Charges For Services	10,573,835	11,256,773	8,807,212	8,807,212	(2,449,561)
Miscellaneous Revenues	2,746,695	1,428,508	1,469,770	1,469,770	41,262
Operating Transfers In	958,163	990,500	1,918,000	1,918,000	927,500
Solid Waste Special Revenues	38,054,479	39,194,863	38,959,049	38,959,049	(235,814)
Fund Balance	(20,825,897)	6,883,803	33,332,856	33,332,856	26,449,053
Total Revenues	\$91,703,440	\$138,628,426	\$159,404,501	\$159,404,501	\$20,776,075
<b>Net County Cost</b>	(\$77,136)	\$154,864	\$197,965	\$197,965	\$43,101
<b>Allocated Positions</b>	406.0	411.0	421.0	421.0	10.0
Temporary (Full-Time Equivalent)	24.0	26.2	25.5	25.5	(0.6)
Total Staffing	430.0	437.2	446.5	446.5	9.4

-This chart does not include appropriations for Fleet Services Internal Service Fund budget (#8190000000), but does include the positions. \*



# Summary

## Roads & Facilities

### Purpose

The Department of Public Works (PW) is responsible for planning, designing, constructing, operating, and maintaining public roads, bridges, water, wastewater systems, flood control, and solid waste systems for the County. Additionally, staff support is provided to the Planning Commission, Groundwater Basin Authority, Flood Control Technical Advisory Committee, Board Water Committee, County Advisory Water Commission, Delta Counties Coalition, and the Delta Coalition. Fleet Services Division support is also provided to all County agencies by Public Works.

This is a summary of the 21 budgets administered by the Public Works Director:

➤ 1016000000	Surveyor	➤ 3031400000	Road District #2
➤ 2023060000	Water Resources	➤ 3031500000	Road District #3
➤ 2023070000	Delta Activities	➤ 3031600000	Road District #4
➤ 2024100000	Flood Channel Maintenance	➤ 3031700000	Road District #5
➤ 3030101000	Administration	➤ 3039900000	Community Infrastructure Program-TIMF
➤ 3030103000	Engineering	➤ 3039902000	Community Infrastructure Program-RTIF
➤ 3030105000	Road Maintenance	➤ 4040800000	Utility Districts
➤ 3030106000	Construction	➤ 8190000000	Fleet Services Internal Service Fund*
➤ 3030108000	Public Services	➤ 9210000000	Solid Waste Enterprise Fund
➤ 3030900000	Community Infrastructure Engineering	➤ 9312000000	CSA 31 Sewer Enterprise Fund
➤ 3031300000	Road District #1		

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Reduce department's vacancy rate by performing intensive and innovative outreach to potential candidates (future goals will be identified for 2024-2025).	16%	13%	June 2024
Demonstrate Leadership Development	Current	Target	Deadline
➤ Engage all group leaders in training to enhance leadership skills. Need for future training will be assessed and identified for years 2024 and 2025.	0%	100%	December 2023
Augment Digitization and Automation	Current	Target	Deadline
➤ Digitization of Improvement Plans and Survey Records by converting paper documents to digital and store in Laserfiche system.	75%	80%	June 2023
	80%	90%	June 2024
	90%	100%	June 2025

# Summary

## Roads & Facilities

➤ Launch a Maintenance Management/Work Order/Infrastructure Inventory System.	40%	60%	June 2023
	60%	80%	June 2024
	80%	100%	June 2025
➤ Create Electronic Workflows to increase efficiencies in document preparation and approval processes.	20%	40%	June 2023
	40%	60%	June 2024
	60%	80%	June 2025
<b>Public Safety/Criminal Justice/Quality of Life</b>			
Mitigate Illegal Dumping/Human Waste	Current	Target	Deadline
➤ Reduce illegal dumping tonnage in public rights-of-way by participating in the County's Illegal Dumping Task Force and assisting with the implementation of the Three E's Plan (Education, Eradication, and Enforcement).	0%	2.5%	June 2023
	2.5%	5%	June 2024
	5%	10%	June 2025
<b>Water Management</b>			
Improve Water Storage/Sustainability	Current	Target	Deadline
➤ For Tracy Subbasin: Obtain Department of Water Resources approval of the Groundwater Sustainability Plan.	20%	40%	June 2023
	40%	60%	June 2024
	60%	100%	June 2025

# 3030101000—Public Works-Administration

## Roads & Facilities

Fritz Buchman, Public Works Director

[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,144,859	\$4,448,709	\$4,886,374	\$4,886,374	\$437,665
Services & Supplies	730,301	1,077,966	1,534,300	1,534,300	456,334
Centrally-Budgeted Expenses	1,385,315	1,893,678	1,910,062	1,910,062	16,384
Other Charges & Uses	9	20	20	20	0
Total Expenditures	\$6,260,484	\$7,420,373	\$8,330,756	\$8,330,756	\$910,383
Expenditure Reimbursements	(2,340,020)	(3,189,950)	(2,649,950)	(2,649,950)	540,000
Total Appropriations	\$3,920,464	\$4,230,423	\$5,680,806	\$5,680,806	\$1,450,383
<b>Earned Revenues By Source</b>					
Interest/Rents	\$205,145	\$200,000	\$200,000	\$200,000	\$0
Charges For Services	65	0	0	0	0
Miscellaneous Revenues	2,833	14,070	14,070	14,070	0
Operating Transfers In	0	100,000	300,000	300,000	200,000
Fund Balance	3,712,421	3,916,353	5,166,736	5,166,736	1,250,383
Total Revenues	\$3,920,464	\$4,230,423	\$5,680,806	\$5,680,806	\$1,450,383
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	29.0	29.0	29.0	29.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	3.8	3.8	3.0	3.0	(0.8)
<b>Total Staffing</b>	32.8	32.8	32.0	32.0	(0.8)

## Purpose

The Department of Public Works (PW) is responsible for planning, designing, constructing, operating, and maintaining public roads, bridges, water, wastewater systems, flood control, and solid waste systems for the County. Additionally, staff support is provided to the Planning Commission, Groundwater Basin Authority, Flood Control Technical Advisory Committee, Board Water Committee, County Advisory Water Commission, Delta Counties Coalition, and the Delta Coalition. Fleet Services Division support is also provided to all County agencies by Public Works. The overall mission is to protect the health and welfare of the public, preserve the County's infrastructure investments, and develop Countywide long-term plans and programs for transportation systems, water quality and supply needs, flood management interests, solid waste management, and Special Districts.

The Public Works Administration budget funds support services for 21 functional areas of the Department. Support services include administration, personnel, payroll, fiscal, document and records management, and geographic information systems.

# 3030101000—Public Works-Administration

## Roads & Facilities

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$466,823 Salary and benefits adjustments.
- (\$29,158) Decrease in extra-help.

#### Services and Supplies

- \$150,000 Increase in professional services for staff professional development.
- \$134,000 Increase in equipment and software maintenance and related licenses.
- \$66,000 Increase in janitorial services.
- \$33,000 Increase in security services.
- \$29,474 Increase in costs from Purchasing and Support Services.
- \$14,400 Increase in membership costs.
- \$11,000 Increase in small tools and furniture costs.
- \$10,500 Increase in staff development and employee training.
- \$8,000 Increase in outreach and education related expenses.
- (\$6,000) Decrease in grounds maintenance services.
- (\$5,000) Decrease in communication costs.

#### Centrally-Budgeted Expenses

- \$490,955 Increase in data processing charges.
- \$5,893 Increase in equipment rents and leases.
- (\$148,192) Decrease in Workers' Compensation and Casualty insurance costs.
- (\$332,272) Cost Allocation Plan adjustment.

#### Expenditure Reimbursements

- (\$540,000) Decrease in direct charges to special districts.

#### Revenues

- \$1,250,383 Increase in the use of fund balance.

#### Operating Transfers In

- \$200,000 Increase in operating transfers in for illegal dumping cleanups.

### Program Discussion

The 2023-2024 recommended budget for Public Works Administration totals \$8,330,756, which is an increase of \$910,383 from the 2022-2023 adjusted budget.

#### Staff Development and Leadership Training

The Public Works Administration team is committed to strengthening the Department and setting it up for sustainable success. Through a variety of initiatives, including the investment of the professional development of staff, the Department is focusing on providing meaningful programs to allow for an engaged workforce, increased staff retention rates, and improved services to the community.

In 2023-2024, the Department will continue to offer the PW Academy to its employees. The PW Academy provides training sessions that cover a variety of topics ranging from budget preparation to interviewing techniques. This very popular program was recently recognized by the American Public Works Association (APWA) to be part of a featured presentation on the topic of employee connection and engagement at the APWA National Conference in August 2023.

Additionally, the Department is providing professional development training to the 21 division leaders. The training is designed to maximize team productivity and individual fulfillment at work. This ongoing training investment identifies how the leaders of the Department can be more effective in managing their teams.

To increase the skill set of its employees, the Department has invested in a Microsoft 365 training program in which staff can take self-paced courses, complete exams, and learn how to be masterful in using Microsoft 365 programs.

#### Innovation

In 2023-2024, the Department will increase its efforts in streamlining document/information sharing through its online project management software that allows for collaboration on projects and processes. This will be achieved with the assistance of an industry partner that will help the department set up the system, explore platform capabilities, and identify best practices. In addition to this effort, the Department will be furthering its pilot project of launching a work order/asset management system.

The Department will invest in its Geographic Information System (GIS) program by providing training and

## **3030101000—Public Works-Administration**

### **Roads & Facilities**

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collaboration opportunities for its GIS team and users. Staff will stay current in the ever-changing technology by attending various trainings in the GIS field. Public Works will explore options to collaborate with the Office of Emergency Services to assist them in developing a GIS program for their department.

Along with its commitment to its employees, Public Works is also dedicated to serving the community through its efforts to operate and maintain public infrastructure. The Department will continue to educate County employees and the public on the importance of public works and how the Department's work improves the quality of life in the

community, through its participation in National APWA Public Works Week. The Department will participate in various outreach efforts that provide useful information, materials, and other items that illustrate and inform the community, staff, and future employees of the efforts done by Public Works.

#### **Illegal Dumping**

Public Works will continue its participation as a member of the Illegal Dumping Task Force and assist with eradication efforts. This year the department was allocated \$200,000 from the American Rescue Act fund to support the cleanup of water ways and other areas within the County.

# 3030103000—Public Works-Engineering

## Roads & Facilities

Fritz Buchman, **Public Works Director**  
[www.sjgov.org/department/pwk](http://www.sjgov.org/department/pwk)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$7,298,227	\$9,608,519	\$10,434,490	\$10,434,490	\$825,971
Services & Supplies	2,537,480	6,374,468	6,910,665	6,910,665	536,197
Centrally-Budgeted Expenses	407,089	512,808	625,382	625,382	112,574
Capital Expenditures	5,357	25,000	0	0	(25,000)
Total Expenditures	\$10,248,153	\$16,520,795	\$17,970,537	\$17,970,537	\$1,449,742
Expenditure Reimbursements	(671,099)	(1,553,925)	(1,426,000)	(1,426,000)	127,925
Total Appropriations	\$9,577,054	\$14,966,870	\$16,544,537	\$16,544,537	\$1,577,667
<b>Earned Revenues By Source</b>					
Taxes	\$217,335	\$790,000	\$3,840,000	\$3,840,000	\$3,050,000
Aid From Other Governments	8,390,064	14,920,066	13,731,774	13,731,774	(1,188,292)
Charges For Services	877,456	661,000	600,000	600,000	(61,000)
Miscellaneous Revenues	1,125	5,600	5,600	5,600	0
Fund Balance	91,074	(1,409,796)	(1,632,837)	(1,632,837)	(223,041)
Total Revenues	\$9,577,054	\$14,966,870	\$16,544,537	\$16,544,537	\$1,577,667
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	67.0	67.0	67.0	67.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	3.2	2.7	2.7	2.7	0.0
<b>Total Staffing</b>	70.2	69.7	69.7	69.7	0.0

## Purpose

The Public Works-Engineering budget consists of the Design, Field, Bridge, and Transportation Engineering Divisions. Services include planning, design, environmental review, right-of-way services, and inspection of construction projects for the County's transportation, utility, bridge, and solid waste facilities. Engineering studies recommend safety, operational, development, capital, and facility planning actions.

## Major Budget Changes

### Salaries & Employee Benefits

- \$825,971 Salaries and benefits adjustments.

- \$20,500 Increase in software and related licenses for new permit review software.

- \$14,750 Increase in costs for small tools and instruments.

### Services & Supplies

- \$561,000 Increase in professional planning and engineering services.
- \$35,000 Increase in employee training and travel.

- \$8,350 Increase in maintenance of equipment due to radar and traffic equipment repairs.
- \$7,752 Increase in fleet services costs.

# 3030103000—Public Works-Engineering

## Roads & Facilities

➤ (\$124,300) Decrease in licenses and permitting costs for environmental mitigation.

➤ (\$5,900) Decrease in cell phone costs.

### Centrally-Budgeted Expenses

➤ \$98,909 Increase in Workers' Compensation and Casualty insurance costs.

➤ \$6,959 Increase in rents and leases of auto equipment.

### Expenditure Reimbursements

➤ \$360,000 Increase in reimbursement from Traffic Impact Mitigation Fees Fund.

➤ \$300,000 Increase in reimbursement from Community Development Block Grant Fund.

➤ \$185,000 Increase in reimbursements from Board of Supervisors Districts.

➤ (\$628,925) Decrease in reimbursement from other County funds.

➤ (\$234,000) Decrease in reimbursement from Solid Waste Enterprise Fund.

➤ (\$100,000) Decrease in reimbursements from Flood Control.

➤ (\$10,000) Decrease in reimbursements from the Airport.

### Revenues

➤ \$2,970,000 Increase in Measure K revenue due to scheduled projects.

➤ \$145,000 Increase in facilities and encroachment permit inspection fees.

➤ \$121,000 Increase in State grant for traffic safety study.

➤ \$80,000 Increase in Measure K Smart Growth revenue.

➤ \$59,669 Increase in Highway Users Tax Account (HUTA) Section 2103 revenue due to scheduled projects.

➤ (\$789,766) Decrease in Road Maintenance and Rehabilitation Senate Bill (SB) 1 revenue due to scheduled projects.

➤ (\$579,195) Decrease in Federal construction funding due to scheduled projects.

➤ (\$223,041) Decrease in use of fund balance.

➤ (\$206,000) Decrease in Federal Emergency Management Agency (FEMA) funding due to completion of scheduled projects.

## Program Discussion

The 2023-2024 recommended budget for Public Works-Engineering totals \$17,970,537, which is an increase of \$1,449,742 from the 2022-2023 adjusted budget.

This budget reflects current reimbursement levels for design and construction engineering activities from Federal, State, and local programs. The budget also reflects current levels of grant-supported activity and associated project cost reimbursements.

In 2023-2024, the objective is to provide the engineering required to complete construction of 47 projects:

Project Name	Projects
Road Maintenance and Rehabilitation	30
Road Districts	4
Highway Safety Improvement Program	4
Highway Bridge Program	3
Measure K Local Street Repair	2
Surface Transportation Program	2
Congestion Mitigation and Air Quality	1
Active Transportation Program	1
Federal Emergency Management Agency	1
<b>Total</b>	<b>48</b>

### Infrastructure Investment and Jobs Act (IIJA) or Bipartisan Infrastructure Legislation (BIL)

The Moving Ahead for Progress in the 21st Century Act (MAP 21) authorized Federal highway spending for Federal fiscal years 2013 through 2015. MAP 21 consolidated several programs, including the Highway Bridge Program (HBP), into a new program structure and retained other discrete programs that provide project-based financial support to the County, including the Surface Transportation Program, Congestion Mitigation and Air Quality Improvement Program (CMAQ), and the Highway Safety Improvement Program (HSIP).

On December 4, 2015, FAST Act was signed into law. The FAST Act authorized \$305 billion for Federal fiscal years

# **3030103000—Public Works-Engineering**

## **Roads & Facilities**

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2016 through 2020 to improve the Nation's surface transportation infrastructure. The law also made reforms and changes to many Federal transportation programs including streamlining the approval process for new transportation projects, establishing performance measures, and providing new safety tools. Some of the rules of MAP 21 that guide program delivery were retained under the FAST Act. The FAST Act was extended by the Federal Government through continuing resolutions to fund the surface transportation program through 2021.

On November 15, 2021, the Federal Infrastructure Investment and Jobs Act (IIJA), also known as the Bipartisan Infrastructure Legislation (BIL), was signed into law. IIJA authorized \$1.2 trillion in funding over a five-year period beginning in 2022, including \$550 billion in new programs and \$650 billion for continuation of core programs established in the FAST Act. IIJA reestablished dedicated funding for local bridges over the five-year term of the Act, with an expected \$800 million available each year for California. The California Department of Transportation (Caltrans) advised local agencies that the Highway Bridge Program continues to be financially constrained with more needs than available funding, with approximately a \$660 million backlog on local-agency advanced projects. The County has secured Federal funding for the preliminary engineering and environmental activities for 15 bridge projects to be constructed over the next 10 years.

### **Congestion Mitigation and Air Quality Improvement Program (CMAQ)**

CMAQ funds are competitively awarded to transportation projects that reduce emissions and mitigate congestion. Public Works succeeded in obtaining CMAQ funds for the signalization of Mariposa Road and Jack Tone Road, which is in the initial design stage. In addition, Public Works continues to assist the Mountain House Community Services District with delivery of the Mountain House Parkway Signal Synchronization Project.

### **Highway Safety Improvement Program (HSIP)**

The HSIP and the High Risk Rural Roads Program (HR3) are competitive Federal safety grants administered by Caltrans. HSIP and HR3 support projects that reduce the number and severity of traffic collisions. Public Works has received HSIP funding for a pedestrian crossing project on Benjamin Holt Drive and for a guardrail replacement project at five locations on West Lane, which are in the design phase. Funding was also received for an advance warning sign project (Eleventh Street Safety Improvements), which will be designed and constructed in 2023-2024. Two roundabout projects (Byron Road/Grant Line Road and Duncan Road/Comstock Road), which previously received safety grant funding are also scheduled to be completed by the end of December 2023.

### **Active Transportation Program**

The Active Transportation Program (ATP) is a State-funded competitive grant, which supports projects that focus on active forms of transportation such as bicycling and walking to schools. In 2018-2019, Public Works successfully obtained an ATP grant for the Oro Avenue and Section Avenue Sidewalk Improvement project for a total of \$1.4 million that will be constructed in 2023-2024. Over the last two years, \$4.8 million has been secured to complete a County-wide sidewalk gap assessment, prepare a complete street corridor plan for Country Club Boulevard, install buffered bicycle lanes along Main Street, and construct active transportation improvements adjacent to Harrison Elementary School. Efforts to complete (Country Club, Main Street) and initiate (Sidewalk Gap Assessment, Harrison Elementary School Active Transportation) will continue in 2023-2024.

### **Road Maintenance and Rehabilitation Account (RMRA) - Senate Bill (SB) 1**

SB 1, a transportation-funding bill signed on April 28, 2017, established the RMRA in the State Transportation Fund for addressing deferred maintenance on the State highway system and local street and road systems. RMRA funds are generated by a series of increases in fuel and vehicle taxes and fees to support research, planning, construction, maintenance, and operation of public streets and highways. The County's share is determined by funding formulas based on the number of registered vehicles and maintained road mileage. Preliminary engineering efforts will be completed for 30 RMRA funded projects in 2023-2024.

### **Highway Users Tax Account (HUTA)**

HUTA funds are derived from State fuel excise taxes to support research, planning, construction, maintenance, and operation of public streets and highways. Similar to RMRA funding, the County's share is determined by funding formulas based on proportions of registered vehicles and maintained road mileage. HUTA Section 2103 revenues, utilized by the Engineering Services Division, are anticipated to increase in 2023-2024, due in part to increased gasoline sales. HUTA funding will be focused on providing advanced planning for future projects and matching funds for other Federal and State-funded projects.

### **Measure K**

Measure K funds are derived from the share of sales tax dedicated towards transit and transportation projects. Portions of Measure K funds are allocated to the Local Street Repair and Roadway Safety programs. Measure K funds also provide the local match for projects that qualify for Federal funding. The San Joaquin Council of Governments (SJCOC) advanced and leveraged Measure K Congestion Relief (MKCR) funds



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## Roads & Facilities

to deliver several major highway projects including the widening of both Interstate 5 and State Route 99 in Stockton, and the extension of State Route 4. This delayed the availability of MKCR funding for other local-agency led projects. The Pershing Avenue Improvements project completed construction in 2022-2023, utilizing cost savings and a reimbursement of funds from previously constructed projects.

### Other Project Support

Staff will continue to focus on the delivery of multiple transportation programs and projects supported by funds from

various other sources. Public Works succeeded in obtaining Federal Emergency Management Agency (FEMA) grants for permanent repairs of two emergency projects resulting from the storms of 2017 (Kennefick Road Flood Control and Howard Road Erosion Control). Construction of Howard Road was complete in 2022-2023 and Kennefick Road Flood Control will begin construction in July 2023. Public Works will continue to pursue competitive transportation funding opportunities, as well as non-road opportunities such as the federal Hazard Mitigation Grant Program and Community Development Block Grant program.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>Projects Designed &amp; Constructed</i>	18	21	27	22	47
<i>Traffic Engineering Studies</i>	59	53	46	68	68
<i>Permits Inspected</i>	558	942	1,049	918	811
<i>Bridges Inspected</i>	54	41	46	54	82
<i>Minor Structures Inspected*</i>	N/A	120	100	80	118
<i>Property Acquisitions/Dispositions</i>	8	7	15	12	14
<i>Property Appraisals</i>	2	4	14	9	8
<i>Property Abandonments</i>	4	12	6	3	6
<i>Environmental Referrals</i>	18	13	10	15	20
<i>Environmental Coordinations</i>	31	36	32	46	50
<i>Development Traffic Impact Studies</i>	7	6	5	5	5
<i>San Joaquin Council of Governments Participations</i>	4	3	5	5	5
<i>Caltrans Participations</i>	4	6	8	8	8
<i>Other Agency/City Participations</i>	2	2	7	8	7
<i>Internal Transportation Studies</i>	2	3	3	3	4

\*Minor Structures Inspections began in 2020-2021.

# 3030105000—Public Works-Road Maintenance

## Roads & Facilities

Fritz Buchman, Public Works Director

[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$8,691,488	\$10,849,578	\$11,691,017	\$11,691,017	\$841,439
Services & Supplies	3,658,157	4,844,968	5,683,492	5,683,492	838,524
Centrally-Budgeted Expenses	1,960,886	2,300,444	1,945,277	1,945,277	(355,167)
Other Charges & Uses	54	400	400	400	0
Capital Expenditures	198,244	75,000	575,000	575,000	500,000
Public Works Project Expense	895,114	3,348,364	4,209,922	4,209,922	861,558
Total Expenditures	\$15,403,943	\$21,418,754	\$24,105,108	\$24,105,108	\$2,686,354
Expenditure Reimbursements	(664,291)	(740,700)	(988,000)	(988,000)	(247,300)
Total Appropriations	\$14,739,652	\$20,678,054	\$23,117,108	\$23,117,108	\$2,439,054
<b>Earned Revenues By Source</b>					
Taxes	\$8,746,773	\$7,060,682	\$7,898,288	\$7,898,288	\$837,606
Licenses/Permits/Franchises	25,736	61,160	24,000	24,000	(37,160)
Aid From Other Governments	10,747,847	13,701,609	13,992,713	13,992,713	291,104
Charges For Services	28,574	10,000	27,000	27,000	17,000
Miscellaneous Revenues	196,245	56,000	56,000	56,000	0
Operating Transfers In	243,974	160,500	863,000	863,000	702,500
Fund Balance	(5,249,497)	(371,897)	256,107	256,107	628,004
Total Revenues	\$14,739,652	\$20,678,054	\$23,117,108	\$23,117,108	\$2,439,054
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	99.0	99.0	99.0	99.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	5.2	5.2	5.2	5.2	0.0
<b>Total Staffing</b>	104.2	104.2	104.2	104.2	0.0

## Purpose

The primary goals of the Road Maintenance Division are to maintain safe roadways and to protect the County's road and bridge infrastructure investments. Performing timely maintenance for the County's 1,643 miles of roadway, 263 bridges, 1 ferry ramp, and 364 minor structures and related facilities is crucial to protecting quality of life within the County. Significant roadway maintenance programs include surface restoration, chip/crack seals, maintenance of traffic signs, roadway striping/legends, clearing drainage structures, maintenance of roadside drainage ditches and vegetation control, safety trimming and removal of unsafe roadside trees, shoulder maintenance, sidewalk safety repairs, roadside debris removal, bridge and ferry ramp maintenance, guardrail maintenance, and drawbridge operations.

# 3030105000—Public Works-Road Maintenance

## Roads & Facilities

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$827,986 Salary and benefits adjustments.
- \$13,453 Increase in extra-help.

#### Services & Supplies

- \$500,000 Increase in professional services for drainage improvement feasibility study.
- \$400,000 Increase in professional services asset collection project.
- \$145,000 Increase in weed abatement expense.
- \$60,000 Increase in signal maintenance costs.
- \$52,000 Increase in clothing and personal supplies.
- \$10,000 Increase in equipment maintenance and repairs.
- \$10,000 Increase in refuse disposal costs.
- (\$300,000) Decrease in fleet services costs.
- (\$40,000) Decrease in professional services for channel maintenance.

#### Centrally-Budgeted Expenses

- \$189,025 Increase in Workers' Compensation costs.
- \$58,877 Increase in radio maintenance costs.
- \$9,241 Increase in data processing charges.
- (\$611,692) Decrease in Casualty insurance costs.

#### Capital Expenditures - Equipment

- \$265,000 Water pumps (5).
- \$145,000 Portable Generators (4).
- \$90,000 Water pump hoses and tools (4).
- \$60,000 Replacement sign printer for traffic maintenance.
- \$15,000 Wireless displays.

#### Public Works Project Expense

- \$861,558 Increase in project expense costs.

#### Expenditure Reimbursements

- \$267,500 Decrease in reimbursement from government fund and inter-fund charges.
- (\$16,000) Increase in reimbursement from special districts direct charges.

#### Revenues

- \$837,606 Increase in sales tax revenue.
- \$628,004 Increase in the use of fund balance.
- \$291,104 Increase in State Highway Users Tax revenue.
- \$17,000 Increase in road and street services revenue.
- (\$37,160) Decrease in licenses and permits revenue.

#### Operating Transfers In

- \$702,500 Increase in transfers from Road Districts.

### Program Discussion

The 2023-2024 recommended Road Maintenance Division budget totals \$24,105,108, which is an increase of \$2,686,354 from the 2022-2023 adjusted budget.

The Division is primarily funded from State gas tax revenues. With this funding, the Division will continue to focus on essential safety and system preservation services.

In 2023-2024, the Division will expand work efforts in the following areas:

- **Implementation of Asset Data Collection Project** – The Division is requesting funding to implement an Asset Data Collection Project. This project will use camera technology and involve the deployment of vehicles driven along County roads. The camera will record Road Maintenance asset locations and insert the information into mapping for Geographic Information System (GIS) identification. This project will enable the Division to have a complete inventory of guardrails, bridges, minor structures, signs,

# 3030105000—Public Works-Road Maintenance

## Roads & Facilities

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legends, traffic signals, and payment striping within the County's road right of way.

- **Traffic Signal Power Back Up System Project** – Road Maintenance will complete the process of upgrading the County-owned traffic signal systems with a power backup system. Currently, if there is a power interruption, the signals fail to operate. These new systems will be powered using hydrogen fuel technology. The goal of this project is to ensure traffic safety during power outage events. This upgrade will also allow employees to respond to other areas of concern during storm or power interruption related events. By the end of June 2023, 17 signal systems will be upgraded. The Road Maintenance Division will complete the upgrade to the remaining 15 signal systems by the end of 2023-2024.
- **Sidewalk and Curb Rehabilitation Project** – The Road Maintenance Division has identified two large areas of sidewalk and one section of curbing that need rehabilitation. These areas encompass over 12,000 square feet of sidewalk and 1,280 linear feet of curb. The sidewalk sections are Mission Road (Stockton) from Tuxedo Avenue to Country Club Boulevard and Plymouth Road (Stockton) from Michigan Avenue to Alpine Avenue. The curb section is along East State Route 99 (Stockton) Frontage Road from Eight Mile Road to Shippee Lane. These projects will be supported by funding from Measure K Roadway Safety.
- **Storm Response Equipment** – The Road Maintenance Division is responsible for ensuring that County roads and storm facilities function properly during storm events. The Division is looking to upgrade several portable pumps and establish an inventory of power supplies. With these assets, the Division will be better equipped for removing water from flooded areas and provide power to storm water facilities during power outage events.
- **Drainage Improvement Feasibility Study** – The Road Maintenance Division has identified areas of the County with aging infrastructure in need of improvement. With funding, the Road Maintenance Division plans to contract with a consultant to evaluate current drainage systems, make recommendations for improvement, and assist with identifying funding sources.
- **Road Stabilization Project** – The Road Maintenance Division requests funding to conduct a pilot Road Stabilization project. This project will utilize new technology using an environmentally friendly product. This product is expected to extend the life of the roadway structure and reduce the frequency of road maintenance work. If successful, this environmentally friendly treatment will be used on roads that require frequent maintenance.
- **Timber Bridge Rehabilitation Project** – The Road Maintenance Division has identified five timber bridges that are in need of structural improvement; Dry Creek Road (Acampo), Frazier Road (Linden), Messick Road (Linden), Waverly Road (Linden), and Buckman Road (Farmington) bridges. These bridges require frequent maintenance that is costly and labor intensive. The Divisions will rehabilitate timber bridges using construction methods that require less maintenance. This project will also decrease road closures and delays to vehicular traffic.
- **Traffic Sign Fabrication Equipment Upgrade** – The equipment for fabricating traffic signs is outdated and no longer supported by the manufacturer. Repair costs are increasing and parts becoming scarce. Because of these two factors, the existing equipment needs replacement. The Division will replace the outdated equipment with modern equipment that is more efficient and take advantage of current technology.
- **Fleet Equipment and Cost Optimization** – The Division will continue a usage assessment of assigned equipment. The purpose of the assessment is to ensure equipment in the Fleet Services program is utilized effectively. The Division will explore cost-effective alternatives that can meet divisional needs. These changes will be included in future budgets.
- **Fleet Replacement Program for Road Maintenance** – One pickup truck, five sign trucks, and two patrol trucks are proposed for replacement through the Fleet Services' Replacement Reserve at an estimated cost totaling \$1,300,000. This approach allows the Road Maintenance Division to pay Fleet Services for the cost of utilizing the equipment, including maintenance and depreciation charges. This allows for sufficient funds to accumulate in a reserve that will replace the equipment once it reaches the end of its useful life.

# 3030105000—Public Works-Road Maintenance

## Roads & Facilities

	Workload Data				
	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021	2021-2022		
<i>Adopt-A-Road (miles adopted)</i>	11	12	14	18	20
<i>Chip-Sealing (miles)</i>	203	140	120	151	123
<i>Crack Seal (miles)</i>	125	130	130	130	133
<i>Debris Removal (tons removed)</i>	2,044	2,459	2,147	2,700	2,400
<i>Leaf Pickup (tons)</i>	434	256	380	409	400
<i>Maintenance Restoration (miles)</i>	3	5	3	5	6
<i>Pavement Legends (each)</i>	5,474	5,638	5,497	4,400	5,500
<i>Pavement Striping (miles)</i>	1,232	1,771	944	1,200	1,200
<i>Raised Pavement Markers (each)</i>	56,705	38,800	29,259	55,000	50,000
<i>Roadside Mowing (miles)</i>	1,747	1,736	1,737	1,737	1,737
<i>Roadway Abatement (incidents handled)</i>	309	210	125	200	200
<i>Shoulder Weed Control (miles)</i>	27	55	60	60	N/A
<i>Sidewalk Repair (square feet)</i>	6,911	7,044	6,288	6,063	18,074
<i>Storm Drain Program (feet)</i>	71,841	82,000	39,550	35,275	40,000
<i>Traffic Sign Maintenance (each)</i>	11,639	11,500	12,049	11,750	11,000
<i>Tree Maintenance (each)</i>	5,391	5,750	4,874	3,820	5,500

# 3030106000—Public Works-Construction

## Roads & Facilities

Fritz Buchman, Public Works Director

[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Other Charges & Uses	\$18,329	\$327,500	\$106,000	\$106,000	(\$221,500)
Public Works Project Expense	18,845,441	37,496,000	49,894,000	49,894,000	12,398,000
Total Expenditures	\$18,863,770	\$37,823,500	\$50,000,000	\$50,000,000	\$12,176,500
Expenditure Reimbursements	0	0	(13,500)	(13,500)	(13,500)
Total Appropriations	\$18,863,770	\$37,823,500	\$49,986,500	\$49,986,500	\$12,163,000
<b>Earned Revenues By Source</b>					
Taxes	\$6,418,937	\$6,574,337	\$2,000,000	\$2,000,000	(\$4,574,337)
Aid From Other Governments	15,552,096	25,343,000	21,614,047	21,614,047	(3,728,953)
Charges For Services	0	1,404,000	0	0	(1,404,000)
Miscellaneous Revenues	0	0	500	500	500
Fund Balance	(3,107,263)	4,502,163	26,371,953	26,371,953	21,869,790
Total Revenues	\$18,863,770	\$37,823,500	\$49,986,500	\$49,986,500	\$12,163,000
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

The Public Works-Construction budget provides funding for the construction of County roads, bridges, and infrastructure. Projects financed exclusively by Road Districts and Community Development Block Grant (CDBG) funds are not included in this budget.

## Program Discussion

The 2023-2024 recommended budget for Public Works-Construction totals \$50,000,000 which is an increase of \$12,176,500 from the 2022-2023 adjusted budget. Discretionary Federal gas tax and State sales tax revenues are projected to increase slightly in 2023-2024. These discretionary revenues support basic roadway operations and maintenance activities in addition to capital construction contracts.

### 2022-2023 Construction Projects

During 2022-2023, construction contracts were awarded for 15 projects, totaling \$19.1 million, including 10 projects scheduled to complete construction in 2022-2023 and 5 projects to begin construction in 2023-2024.

Funding Source for Projects	No. of Projects	Cost (Millions)
Road Maintenance and Rehab (SB 1)	9	\$7.9
Highway Bridge Program	1	5.1
Highway Safety Improvement Program	1	2.6
Measure K Local Street Repair	2	2.0
Measure K Congestion Relief, Federal Emergency Management Agency	2	1.5
<b>Total</b>	<b>15</b>	<b>\$19.1</b>

# 3030106000—Public Works-Construction

## Roads & Facilities

### 2023-2024 Construction Projects

The 2023-2024 recommended budget delivers the following 43 projects and 4 right-of-way acquisitions:

Funding Source for Projects	No. of Projects	Cost (Millions)
Road Maintenance and Rehab Account (SB 1)	30	\$31.5
Highway Bridge Program	3	5.0
Surface Transportation Program	2	4.4
Highway Safety Improvement Program	4	3.3
Measure K-Local Street Repair	2	2.0
Active Transportation Program	1	1.0
Congestion Mitigation & Air Quality Improvement	1	0.1
Right-of-Way	4	0.1
<b>Total</b>	<b>47</b>	<b>\$47.5</b>

### Federal Programs

#### Surface Transportation Program (STP)

This Program is funded by a flexible block grant administered by the San Joaquin Council of Governments (SJCOG). Historically, Federal gas tax dollars have been distributed to local agencies for discretionary use on local roadways classified as Federal aid routes. The County utilizes these funds to rehabilitate local regional and inter-city roadways. The Construction 2023-2024 STP budget includes \$4.4 million to resurface Howard Road and rehabilitate Benjamin Holt Drive.

#### Highway Safety Improvement Program (HSIP), and High Risk Rural Roads Program

These competitive Federal Grant Programs are administered by the California Department of Transportation (Caltrans) to reduce the number and severity of traffic accidents, and to support projects that target active forms of transportation, including bicycles and pedestrians.

The 2023-2024 budget includes \$3.3 million to support the construction of one HSIP roundabout project, one advance warning signs project, one pedestrian crossing project and one bridge approach railings project.

#### Highway Bridge Program (HBP) and Bridge Preventative Maintenance Program (BPMP)

Caltrans establishes Statewide lists of deficient bridges based upon inspection reports. These reports designate which bridges are eligible for replacement, rehabilitation, preventative maintenance, and erosion countermeasures.

The passage of the Federal Infrastructure Investment and Jobs Act (IIJA) will increase dedicated funding for local bridges over the five-year term of the Act. However, Caltrans advised local agencies the HBP continues to be financially constrained as there are more needs than available funding, and an approximately \$660 million backlog on local agency advanced projects. Public Works is currently developing 15 HBP and BPMP projects for construction within the next 10 years.

Three projects totaling \$5.0 million are scheduled to be awarded in 2023-2024, including two bridge replacements and one railing replacement project.

#### Congestion Mitigation & Air Quality (CMAQ) Improvement Program

The CMAQ Improvement Program is for those areas that do not meet the National Ambient Air Quality Standards as well as former non-attainment areas that are now in compliance. The formula for fund distribution considers an area's population by county and the severity of its ozone and carbon monoxide problems, with greater weight given to areas that have not attained both carbon monoxide and ozone standards. CMAQ funds are directed to transportation projects and programs that reduce emissions and mitigate congestion through a SJCOG administered competitive process.

The 2023-2024 budget contains \$84,000 in funding for the synchronization of signals on Mountain House Parkway, in partnership with the Mountain House Community Service District.

### State Programs

#### Road Maintenance and Rehabilitation Account (RMRA) - Senate Bill (SB) 1

The RMRA was established in the State Transportation Fund by SB 1. SB 1 is a transportation funding bill signed by the Governor on April 28, 2017, for the purpose of addressing deferred maintenance on the State highway and local street and road systems. RMRA funds are generated by a series of increases in fuel, vehicle taxes, and fees to support research, planning, construction, maintenance, and operation of public

# **3030106000—Public Works-Construction**

## **Roads & Facilities**

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streets and highways. Similar to the Highway Users Tax Account, the County's share is determined by funding formulas based on the number of registered vehicles and maintained road mileage.

The 2023-2024 budget includes \$31.5 million to support the construction of 30 new RMRA projects.

### ***Active Transportation Program (ATP)***

The ATP was created to encourage increased use of active modes of transportation, such as walking and biking. The ATP consolidated various State and Federal transportation programs, including the Transportation Alternatives Program, Bicycle Transportation Account, and State Safe Routes to Schools, into a single competitive program with a focus to make California a national leader in active transportation.

Public Works has been successful in obtaining a competitive grant totaling \$1.0 million for the Oro Avenue and Section Avenue Sidewalk Accessibility Improvements project, which will be constructed in 2023-2024.

### **Local Programs**

#### ***Measure K - Local Street Repair (MKLSR)***

Measure K funds are used as local match for Federal- and State-funded projects, as well as ongoing road maintenance needs. The Measure K Program was renewed by voters in 2006, and does not sunset until 2041.

Under the Program, 30% of the total funding is designated for MKLSR road resurfacing/rehabilitation of which 5% must be used for MKLSR safety needs.

Measure K funds will be utilized for the construction of two projects totaling \$2.0 million in 2023-2024, and will provide local match for the Federal funding of other projects. An additional \$2.5 million will be utilized for construction management services.

#### ***Measure K - Congestion Relief Program (MKCR)***

MKCR funds are designated for County roadway improvement projects specified in Measure K that provide capacity-enhancing features, additional travel lanes, signalization, and channelization. New MKCR projects will not be awarded in 2023-2024.



# 3030108000—Public Works-Public Services

## Roads & Facilities

Fritz Buchman, *Public Works Director*  
[www.sigov.org/department/pwk](http://www.sigov.org/department/pwk)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$817,650	\$850,673	\$1,079,371	\$1,079,371	\$228,698
Services & Supplies	122,052	253,700	165,400	165,400	(88,300)
Centrally-Budgeted Expenses	11,039	12,108	15,190	15,190	3,082
Total Expenditures	\$950,741	\$1,116,481	\$1,259,961	\$1,259,961	\$143,480
Expenditure Reimbursements	(184,381)	(66,000)	(90,000)	(90,000)	(24,000)
Total Appropriations	\$766,360	\$1,050,481	\$1,169,961	\$1,169,961	\$119,480
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$99,241	\$115,000	\$120,000	\$120,000	\$5,000
Charges For Services	825,277	866,500	870,500	870,500	4,000
Fund Balance	(158,158)	68,981	179,461	179,461	110,480
Total Revenues	\$766,360	\$1,050,481	\$1,169,961	\$1,169,961	\$119,480
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	5.0	5.0	6.0	6.0	1.0

- In 2022-2023, Development Services was retitled to Public Services.

## Purpose

The Public Services budget provides funding for Public Works-Public Services Division activities, including the review of private development projects; issuing encroachment and transportation permits; providing engineering support for ongoing development of the Stockton Metropolitan Airport and Veteran's Affairs Community Based Outpatient Clinic; and serving as staff support to the Planning Commission. The Public Services Division serves as the liaison with the Community Development Department (CDD) and reviews all unincorporated development project applications to ensure the provision of adequate public infrastructure to support the development in a sustainable, efficient, safe, and fiscally responsible manner, while protecting the environment and natural resources.

## Major Budget Changes

➤ (\$30,000) Decrease in software and related licenses.

### Salaries & Employee Benefits

- \$69,482 Salary and benefits adjustments.
- \$159,216 Add one Engineer I-IV position.

### Expenditure Reimbursements

- \$26,000 Increase in reimbursement from government fund and inter-fund charges.

### Services & Supplies

- \$11,000 Increase in employee training.
- (\$75,000) Decrease in professional services for flood management and community infrastructure engineering.

### Revenues

- \$110,480 Increase in the use of fund balance.
- \$24,000 Increase in charges for engineering services.

# 3030108000—Public Works-Public Services

## Roads & Facilities

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- \$5,000 Increase in license and permit fees.
- (\$20,000) Decrease in private development application revenue.

### Program Discussion

The 2023-2024 recommended budget for Public Services totals \$1,259,961, which is an increase of \$143,480 from the 2022-2023 adjusted budget.

Issuance of transportation, encroachment permits, and building permits remained high in 2022-2023, with minor variations compared to 2021-2022. Permit activity is expected to remain at these levels in 2023-2024. Private development applications have remained consistent during 2022-2023 compared to previous years. The workload associated with private development applications predominantly consists of residential, commercial, and industrial development applications. The consistency of residential applications indicates a steady demand for housing in the County.

In 2023-2024, private development applications are expected to remain roughly the same as the previous year with continued large and complex projects. Private and public development projects result in a broad array of quality-of-life benefits for the community, including job creation, economic stimulus, additional housing, greater access to health care, and commercial and industrial business expansion.

Public Services continues to engage in several activities that are not fee-supported but important to protect the County's interests and ensure adequate infrastructure to support and mitigate impacts of future growth. In 2021-2022, CDD lead the effort to update the County's Development Title to align

with the 2035 General Plan Update. Several amendments to the adopted Development Title are anticipated in 2023-2024, and the Division will continue to coordinate with CDD on updating the Development Title. Additionally, Public Services engages with the cities as their urban growth patterns drive the demand for utilities and transportation facilities to serve urban development. The review of city development projects, environmental documents, and Local Agency Formation Commission applications are necessary to minimize impacts upon adjacent unincorporated areas.

Public Services plays a lead role in the application of programs affecting development projects. The County's Stormwater Quality Control program has influenced development standards to sustain a "green" environment. Mitigating stormwater runoff from development projects is one way the County is making changes to foster a sustainable and environmentally friendly approach to development. Public Services will assist in the application of these programs by serving as a liaison to affected developers.

The Public Services Division also plays a vital role in the development of new manufacturing, distribution, and recreational uses.

### Surface Mining and Reclamation Act (SMARA)

Public Services is charged with maintaining an effective and comprehensive surface mining, reclamation inspection, and financial assurance program in the County, as required by SMARA. These efforts are made to ensure that adverse environmental effects are prevented or minimized and that mined lands are reclaimed to a usable condition that is readily adaptable for alternative land uses. Public Services monitors 26 quarry operations and annually prepares Quarry Financial Assurances Reports for submission to the State.

## 3030108000—Public Works-Public Services

### Roads & Facilities

#### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Public Services</b>					
<i>Agreements, Dedications and Declarations</i>	10	12	11	11	13
<i>Building Permit Releases</i>	1,379	1,697	1,312	1,100	1,380
<i>Business Licenses Issued</i>	279	344	280	248	300
<b>Community Development</b>					
<i>Application Referrals</i>	226	179	278	215	225
<i>Improvement Plan Referrals</i>	153	129	170	148	175
<i>Encroachment Permits</i>	558	942	1,007	950	1,050
<i>SMARA Monitoring, Inspection &amp; Financial Assurances</i>	26	26	26	26	26
<i>Transportation Permits</i>	1,457	1,410	1,242	1,150	1,200

# 2023060000—Public Works-Water Resources

## Roads & Facilities

Fritz Buchman, *Public Works Director*  
[www.sjgov.org/department/pwk](http://www.sjgov.org/department/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,682,864	\$2,169,588	\$2,389,348	\$2,389,348	\$219,760
Services & Supplies	544,351	1,287,261	1,321,800	1,321,800	34,539
Centrally-Budgeted Expenses	132,469	113,483	28,139	28,139	(85,344)
Total Expenditures	\$2,359,684	\$3,570,332	\$3,739,287	\$3,739,287	\$168,955
Expenditure Reimbursements	(2,359,684)	(3,570,332)	(3,739,287)	(3,739,287)	(168,955)
Total Appropriations	\$0	\$0	\$0	\$0	\$0
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	13.0	13.0	13.0	13.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	1.5	2.3	2.3	2.3	0.0
<b>Total Staffing</b>	14.5	15.3	15.3	15.3	0.0

## Purpose

The Water Resources Division (Water Resources) is responsible for carrying out the functions of the San Joaquin County Flood Control and Water Conservation District (District), including administration of the County's flood management and water resources programs. Water Resources is also responsible for implementing the goals and objectives established by the Board's Strategic Plan to Meet Water Needs. Finally, Water Resources administers the County's National Pollutant Discharge Elimination System (NPDES) Municipal Stormwater Program and the Delta Activities budget.

## Major Budgets Changes

➤ (\$30,000) Decrease in website maintenance costs.

### Salaries & Employee Benefits

➤ (\$9,000) Decrease in furniture costs.

➤ \$219,760 Salary and benefits adjustment.

### Services & Supplies

### Centrally-Budgeted Expenses

➤ \$120,193 Increase in allocated service department costs.

➤ \$8,902 Increase in Workers' Compensation and Casualty insurance costs.

➤ \$26,000 Increase in special studies and support.

➤ (\$97,366) Cost Allocation Plan adjustment.

➤ \$15,000 Increase in professional services tax roll support.

### Expenditure Reimbursements

➤ (\$100,000) Decrease in professional services for consultants.

➤ \$61,838 Increase in reimbursement from the Flood Control and Water Conservation District.

➤ \$57,992 Increase in reimbursement from NPDES.

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## Roads & Facilities

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- \$49,125 Increase in inter-fund charges from Water Investigation Zone No. 2 (Zone 2).

### Program Discussion

The 2023-2024 recommended budget for Water Resources totals \$3,739,287, which is an increase of \$168,955 from the 2022-2023 adjusted budget.

Water Resources continues to face increasing workload demands, largely due to complex and frequently changing State and Federal requirements affecting flood control, stormwater management, and water resources management functions, including pursuing and managing grants.

#### San Joaquin County Flood Control and Water Conservation District (District)

The State Legislature created the District in 1956 to construct, operate, maintain, and plan flood control, water supply, and drainage projects. The District is a Countywide entity with the County Board of Supervisors serving as the governing body of the District. The Director of Public Works is designated as the Flood Control Engineer in the District enabling legislation and is delegated certain authority as described in the San Joaquin County Ordinance (B-20-68).

The District is authorized by statute to form zones within the County to fund construction projects and investigations related to flood control and water resources. Water Investigation Zone 2 and Flood Control Zones 9 and 10 are active zones within the District. Program revenues, expenditures, and budgeted activities for each specific funding source are shown within the Special Districts budgets.

The District is an active member agency of the San Joaquin Area Flood Control Agency (SJAFCOA) and Mokelumne River Water and Power Authority (MRWPA). Water Resources also supports the Advisory Water Commission, consisting of members from 23 agencies and interests who are appointed by and charged with making water-related recommendations to the Board of Supervisors, the Greater San Joaquin County Regional Water Coordinating Committee, the Tracy Subbasin Groundwater Sustainability Agency Coordinating Committee, and the Eastern San Joaquin Groundwater Authority. The latter two are responsible for complying with Sustainable Groundwater Management Act (SGMA) requirements.

#### Flood Management

Water Resources responsibilities include floodplain administration activities, which involve enforcing the County's flood and drainage related ordinances; providing

engineering and budgetary support to the Channel Maintenance Division to ensure compliance with State and Federal levee maintenance requirements; processing watercourse encroachment permits and elevation certificates; and educating the community about reducing flood risks. The flood management activities described below are primarily supported by the Special District budgets for the District, Zone 9, and/or SJAFCOA Assessment District (AD) 96-1.

#### National Flood Insurance Program (NFIP)

The NFIP provides Federally-backed flood insurance within communities that enact and enforce floodplain regulations. Water Resources administers the County's Flood Hazards Ordinance No. 4488, as required by the Federal Emergency Management Agency (FEMA). A comprehensive update to the flood hazard ordinance is currently underway to align with the flood provisions of the California Building Standards Code (Title 24) and is expected to be completed by the end of 2023. Water Resources will continue to work closely with the County's Federal legislative advocates and other agencies in monitoring legislation related to proposed flood insurance rate increases and other NFIP-related issues that may affect policy holders.

#### NFIP Community Rating System (CRS) Program

Water Resources also maintains the County's eligibility in the NFIP CRS Program. Under the CRS program, flood insurance premiums of residents and businesses are discounted to reflect the floodplain management practices that exceed the NFIP requirements. San Joaquin County currently holds a CRS class rating of seven, which entitles property owners with County Special Flood Hazard Areas (SFHAs) to premium discounts up to 15% and 5% for properties outside the SFHA. Only 24 of California's 104 participating cities and counties have ratings better than a seven. During 2023-2024, Water Resources will continue efforts to improve the County's class rating. These efforts will include outreach activities identified and accountable through the establishment of a CRS Program for public information. The 2023-2024 Flood Control & Water Conservation District budget reflects appropriations of \$359,000 to fund related costs.

#### Flood Preparedness and Emergency Response

Water Resources secured grant funding from the California Department of Water Resources (DWR) for the Delta 2 Emergency Response (\$273,000) and Statewide 3 Flood Emergency Response (\$583,950) programs. Delta 2 is under contract (A-22-489) to complete the project in accordance with the terms of the DWR agreement. The project work includes updates to the local Advance Flood Warning Network (ALERT) and inundation mapping, and Flood

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## **Roads & Facilities**

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Safety Plans. The scope of work for Statewide 3 is under revision, and a consultant will be selected in 2023-2024 after a funding agreement is executed with DWR. The budget includes emergency operations training, updating flood safety and emergency operations plans, procuring flood fight materials, and implementing Geographical Information System (GIS) web-based platforms. These projects are expected to be completed by the end of 2024 and will be funded through the District budget (for Delta 2) and through the Zone 9 budget (for Statewide 3) with reimbursement from DWR.

### ***Flood Risk Reduction***

In 2018, Water Resources secured funding from DWR through the Small Communities Flood Risk Reduction grant program to study six small communities (Banta, French Camp, Kasson, Morada, Stoneridge, and Weatherbee) whose levees are protected by the State Plan of Flood Control. The feasibility studies were completed in 2022 and the projects will be closed. This will enable each community to be eligible for future DWR funding for flood mitigation projects.

### **San Joaquin Area Flood Control Agency (SJAFC)**

SJAFC was created to develop and implement projects that would reduce the risk of flooding in the Stockton Metropolitan area. Under an agreement with SJAFC, the District (through the Channel Maintenance Division) maintains the levee improvements that were constructed in 1998 to provide 100-year flood protection by using funding from the SJAFC AD 96-1 benefit assessment. The budget for AD 96-1 is contained within the Special Districts budgets.

State law presently requires 200-year flood protection for most new development in urban and urbanizing areas. In 2017, the cities of Lathrop and Manteca joined SJAFC. Since that time, the Cities of Lathrop, Manteca, Stockton, and San Joaquin County have worked jointly to establish an Enhanced Infrastructure Financing District (EIFD) and other mechanisms to fund 200-year flood protection improvements for the Mossdale Tract area.

The Mossdale Tract EIFD does not impose any new tax on property owners; the participating jurisdictions will contribute a portion of property tax increment revenues generated from increased assessed value to the Mossdale Tract EIFD. The EIFD was approved by the Board of Supervisors on July 12, 2022 (R-22-135). Additional funding mechanisms for the flood improvement project include revenues collected from the development impact fee, which was approved by the Board on November 8, 2022 (B-22-579).

### **Sustainable Funding**

Since 2006 (following Hurricane Katrina), State and Federal agencies have adopted additional flood management regulations and are strictly enforcing new standards. These new standards and additional environmental restrictions have resulted in increased costs for performing maintenance and repairs. Despite several attempts to implement short-term cost reduction measures and secure grant funding in recent years, revenues generated by Zone 9 and SJAFC AD 96-1 benefit assessments are insufficient to meet the required State and Federal Operations, Maintenance, Repair, Replacement and Rehabilitation (OMRRR) requirements. Failure to maintain levees and channels to current standards could result in decertification of levees, loss of eligibility for State and Federal emergency repairs (caused by major storm events) and may have negative economic impacts due to resulting Special Flood Hazard Area designations.

The initial effort for generating additional revenue (formation of a new benefit assessment district) was put on hold in 2020 due to the impact of COVID-19. Since that time, the District and SJAFC prepared a joint analysis and decided to pursue a single assessment formation covering combined flood protection services, as there is significant overlap between the two districts (approximately 52,000 parcels). The Proposition 218 process for the new assessment is scheduled to be completed in June 2023, with follow-up work potentially extending into August 2023. The total cost for this effort is anticipated to be approximately \$700,000, which will be shared with SJAFC through a Memorandum of Understanding. The County budgeted its share of these costs in the 2022-2023 budget, and appropriations will be rolled into the 2023-2024 budget if and as needed to complete follow-up work.

### **Mormon Slough Erosion Repair**

Construction of the Upper Mormon Slough Erosion Repair Project was completed in 2022. The total estimated project cost of \$12.0 million was 90% funded through a Flood System Repair Project grant from DWR. The remaining 10% local match was funded by the Zone 9 and District budgets. There are no appropriations for 2023-2024, as close out activities are expected to be completed by June 2023.

### **Deferred Maintenance Phase 2**

In 2018, the District entered into a funding agreement with DWR to evaluate and repair pipe penetrations affecting the integrity of levees within the State Plan of Flood Control. Phase 1 included the inspection of over 300 pipe penetrations and will be completed by June of 2023. Phase 2 will consist of repairs to the levee pipe penetrations and is anticipated to rehabilitate approximately 75 pipes using a cast-in-place pipe methodology. An additional 11 pipes will require full

# 2023060000—Public Works-Water Resources

## Roads & Facilities

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replacement. The project will be fully funded by DWR. Public Works has agreed to maintain the pipes through an Operations and Maintenance Agreement with the Central Valley Flood Protection Board. The Flood Construction budget will fund project costs, including staffing and construction management, which is estimated at \$5.6 million for 2023-2024.

### Water Resources Management

Water Resources staff provide technical and administrative support for a number of water resources stakeholder-driven programs in which the County is an active participant or serves in a lead capacity. Water Resources provides the primary support staff to the District's Advisory Water Commission, the Eastern San Joaquin Groundwater Authority (GWA), and the Tracy Subbasin Coordinating Committee. The latter two groups were created to address requirements of the Sustainable Groundwater Management Act (SGMA) of 2014. In addition, Water Resources is pursuing water rights application 29835 on the Mokelumne River and identifying projects to put the water to beneficial use. This work is critical to protecting the Mokelumne River water right from being cancelled by the State Water Resources Control Board (SWRCB).

Costs for these efforts are reimbursed from Water Investigation Zone 2 and MRWPA budgets and the GWA.

### Water Investigation Zone No. 2 (Zone 2)

In 1989, the Board established Zone 2 to provide a revenue source for water resources planning activities. The Zone 2 funding mechanism is a Countywide property-related fee. The only allowable use of the fee is to carry out the goals and objectives set forth in the 2015 Strategic Plan to Meet Water Needs, which include the following:

- Protect and preserve existing water rights and area of origin rights.
- Manage groundwater in Eastern San Joaquin County.
- Protect Delta water resources common pool.
- Maintain existing, and develop new, water supplies to meet Southwest County water needs.
- Develop funding programs to meet water supply needs.
- Support water conservation programs.

The budget for Zone 2 includes the following costs:

- Maintaining and developing monitoring networks for groundwater levels and water quality;

- Coordination and planning efforts necessary to meet the statutory requirements of SGMA;
- Demonstration Recharge, Extraction and Aquifer Management (DREAM) project County export permit compliance;
- Integrated Regional Water Management (IRWM) administration;
- Watershed education and outreach activities.

Other activities during 2023-2024 include implementation of data management systems and monitoring network enhancements for the groundwater program. Work will entail development of a digital groundwater-monitoring inventory, along with modernization of data collection, storage, retrieval and reporting processes. Work will also include strategic visioning and financial planning for the sustainability of Zone 2 programs. The 2023-2024 Zone 2 budget contains appropriations of \$100,000 for staff and consultant costs associated with these efforts.

### Sustainable Groundwater Management Act (SGMA)

SGMA establishes a State-mandated framework for sustainable groundwater management by local Groundwater Sustainability Agencies (GSAs). The two groundwater subbasins in the County are subject to SGMA: the Eastern San Joaquin (ESJ) Subbasin, designated as critically over drafted and a 'high priority' by DWR and the Tracy Subbasin, designated as 'medium priority'.

#### Eastern San Joaquin Subbasin

There are 16 GSAs within the Eastern San Joaquin Subbasin, which formed the Eastern San Joaquin Groundwater Authority (GWA), a Joint Powers Authority (JPA), in 2017. Water Resources administers the GWA on behalf of the member agencies, including procurement and administration of grants from DWR to implement the GWA's Groundwater Sustainability Plan (GSP).

Groundwater Sustainability Plans (GSPs) have been prepared for both basins. The GWA GSP has been reviewed and accepted by DWR after it was revised in 2022.

During 2023-2024, staff will continue efforts to implement the GSP, which includes conducting groundwater monitoring and reporting efforts and supporting implementation of projects that will develop approximately 80,000 acre feet of surface water supply by 2040. The 2023-2024 Zone 2 budget contains appropriations of \$225,000 to fund GSP implementation activities.

In October 2022, DWR and the GWA entered into Agreement No. 4600014643 that awards \$7.6 million to the

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## Roads & Facilities

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GWA. The three projects, corresponding Local Project Sponsor and grant award are listed below:

- \$3.3 million – Eastern San Joaquin Geophysical Investigations and Groundwater Recharge (Mokelumne River), San Joaquin County.
- \$300,000 – Delta Water Supply Project Groundwater Recharge Improvements Project, Geotechnical Investigations, City of Stockton.
- \$3.9 million – North System Improvement Project Phase 1, North San Joaquin Water Conservation District.

Water Resources staff will oversee the grant administration consultant. The County's project and funding are discussed in further detail in the Mokelumne River Water Rights section.

### Tracy Subbasin

The Tracy Subbasin covers western San Joaquin County and a small portion of Alameda County. Water Resources coordinated development of the GSP, including additional outreach to disadvantaged communities. The GSAs within the Tracy Subbasin were awarded a \$450,000 grant from DWR to develop a GSP, which was collaboratively developed by the six GSAs with input from local stakeholders and the public. The Board of Supervisors adopted the Tracy GSP (R-22-13), which staff subsequently submitted to DWR on January 28, 2022. The Tracy subbasin GSP is under DWR review. Work program activities in 2023-2024 will entail GSP implementation and a grant application for the Round 2 Sustainable Groundwater Management Implementation program. The 2023-2024 Zone 2 budget contains appropriations of \$85,000 to support GSP implementation activities in the Tracy subbasin.

### Demonstration Recharge, Extraction and Aquifer Management (DREAM) Project

The purpose of the DREAM Project is to develop a successful pilot scale groundwater storage project in Eastern San Joaquin County. The Project allows the East Bay Municipal Utility District (EBMUD), under permit from the County, to temporarily store Mokelumne River water in the underground basin and recover up to half of the banked water in the future. This will provide supplemental dry-year supply for EBMUD as well as additional water for the local groundwater users while also reducing overdraft. Surface water diversions for the Project were initiated in late 2018, continued in 2019, but did not occur in 2020 or 2021 due to drought conditions. Groundwater extraction of the stored water consistent with the permit began in February 2023.

Water Resources coordinates a Monitoring Committee and oversees monitoring of wells prior to and during recharge and extraction. Costs for these activities are reimbursed by the Project fund established by an agreement with North San Joaquin Water Conservation District and EBMUD. In 2023-2024, staff will work with local water districts and EBMUD to further develop project concepts to be implemented in the longer term and build on the pilot project effort.

### Integrated Regional Water Management (IRWM)

Countywide water management efforts require integration across multiple jurisdictions to address issues and implement water management solutions on a regional scale. IRWM is a DWR-supported planning program, including grant funding for communities for identification and implementation of integrated, multi-benefit regional projects. The Zone 2 budget reflects an allocation of \$75,000 for staff and consultant costs related to implementing and administering the IRWM plan.

In 2019, Water Resources led the effort to create the Greater San Joaquin County Regional Water Coordinating Committee (Committee) comprised of 11 member agencies. The Committee updated the 2014 IRWMP to meet new State requirement and submitted the document to DWR who accepted the IRWMP update. The acceptance of the report qualifies the area for State bond funds and grant funding for capital projects.

Water Resources successfully secured \$348,000 in funding under the IRWM Disadvantaged Community (DAC) Involvement Program. The DAC Program was designed to ensure the engagement of DACs including underrepresented communities or economically distressed areas in IRWM planning efforts. Outreach in the DAC communities has been completed and remaining work entails implementation of projects within the disadvantaged communities of Thornton Community Service Area (CSA) 12 and Rancho San Joaquin Maintenance District (SJMD). Water Resources successfully negotiated \$6.5 million of Proposition 1 Round 2 grant funding for project implementation. Of this amount, \$1.4 million was allocated for water system improvements in CSA 12 and in Rancho SJMD; \$2.9 million was allocated for the North San Joaquin Water Conservation District South System Phase 3 Improvement Project; \$1.9 million was allocated to the City of Stockton's Delta Water Supply Phase 2 Project and \$273,000 was allocated for grant administration. The Zone 2 budget reflects staff costs for assisting with grant administration and coordination efforts necessary to implement the multi-agency projects.



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### Watershed Education and Outreach Activities

Since the last drought, the State Water Resources Control Board (SWRCB) made several water conservation measures mandatory. The Special District budgets for Zone 2 and CSA 54 include combined appropriations of \$122,000 to support watershed-based education efforts that increase awareness of water supply, flooding, and storm water quality issues. Water Resources will continue to cultivate partnerships with community stakeholders, local schools, and volunteer groups to engage in education and outreach activities.

2023-2024 appropriations in Zone 2 and CSA 54 will also fund costs for advertising, and digital and social media as forums for connecting with a wide range of community members.

### American River and Mokelumne River Water Rights

The County's American River Water Rights application was reviewed by the SWRCB Administrative Hearing Office (AHO) who recommended cancellation of the application to the SWRCB. In July 2022, the SWRCB accepted the AHO's recommendation and denied the County access to this source of supply and cancelled the application.

The County, through the Mokelumne River Water & Power Authority (MRWPA) also has Application 29835 for water from the Mokelumne River. Staff is working to plan projects that benefit water use and supply. This work is critical to protecting and perfecting the water right which is at risk, unless we vigorously pursue and implement projects (up to 110,000 acre-feet of potential supply could be lost through inaction). It is anticipated that the County will incur costs to coordinate with local interests on projects to apply for water rights; to continue defending the water rights application; to design projects, build partnerships and conduct environmental review, and to participate in the SWRCB hearings should this occur. These costs are reflected in the MRWPA budget.

The MRWPA is a JPA consisting of the District and the County. The 2023-2024 MRWPA budget reflects appropriations of \$500,000 for legal and consulting costs related to supporting the processing of the County's water rights application for the Mokelumne River. Costs to support defense of the application and coordinating efforts to develop projects to put this water to beneficial use are also anticipated. The County and local interests must demonstrate due diligence in planning and environmental review of projects making use of the water such as a conjunctive use program that addresses critical overdraft.

Water Resources will work with Mokelumne River interests and propose a strategy to develop water rights applications that include a significant role for local stakeholders such as

North San Joaquin Water Conservation District, Woodbridge Irrigation District, Stockton East Water District, and/or the City of Stockton.

### Mokelumne River Water Rights Development

The 2023-2024 MRWPA budget reflects \$3.3 million of appropriations to fund project activities that focus on floodplain locations with highest potential for groundwater recharge, water conservation and the beneficial use of Mokelumne River water rights. These efforts are being funded by the DWR SGMA Implementation Round 1 grant. Supplemental funding from the General Fund or other sources are likely to be required to protect these water rights.

### Stormwater Management

The State regulates stormwater discharges from urban areas. The jurisdictional areas of the County adjacent to and located within the Stockton Urban Area, referred to as the Phase I Municipal Separate Storm Sewer Systems (MS4) jurisdictional area, are enrolled under the National Pollutant Discharge Elimination System (NPDES) Permit and Discharges from MS4 permit (General Permit). The remainder of the County Phase II MS4 jurisdictional service area includes the unincorporated areas in and around the cities of Lathrop, Lodi, Manteca, Ripon, and Tracy.

Funding for compliance in the Phase I MS4 jurisdictional area is generated through CSA 54. Compliance funding in the Phase II MS4 areas have been funded through nominal allocations from the Delta Activities budget (#2023070000) and from the non-road General Fund allocation to Public Works.

Long-term dedicated funding for implementation of the Phase II jurisdictional area is needed, and the most likely mechanism is a property-related fee or an assessment established pursuant to Proposition 218 requirements. Water Resources must carry out the program requirements, partner with the State in pursuit of program objectives, and work with the Regional Board on the following:

- Managing and improving the quality of stormwater discharges.
- Developing cost-effective programs for pollution prevention.
- Providing public outreach to encourage residents to implement best management practices for reducing pollutant loads in stormwater runoff.
- Preparing annual reports, including program effectiveness assessments.
- Implementing stormwater quality measures for new development/redevelopment projects and

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## Roads & Facilities

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performing inspections during and after construction activities.

- Participating in regional efforts to encourage the Regional Board to allow for cost-effective and practical solutions to be included in future NPDES permits.

2023-2024 appropriations include \$100,000 for regulatory requirements (Trash Amendments) of the local permit and will result in a total maximum daily load requirement. In order to capture small debris at storm drain inlets or pump stations prior to discharging into creeks, enhanced street sweeping and monitoring of high-trash generation areas will be necessary to comply with these regulations.

The MS4 General Permit is required under the Federal Clean Water Act, which requires the discharger to develop and implement a Stormwater Management Plan to reduce the discharge of pollutants to the maximum extent practicable. Water Resources is investigating opportunities to centralize stormwater quality requirements for new development and redevelopment projects to streamline development review applications and inspections of development projects.

The Special District budget for CSA 54 includes appropriations of \$410,000 for consultants and staffing to implement the permit's requirements.

### Delta Activities

The Delta continues to be a County priority. Public Works receives 10% of Tobacco Settlement funding for Delta and other water-related activities, which is anticipated to be \$730,000 for 2023-2024. Public Works has worked closely on Delta-related activities with other County departments (County Administrator's Office, County Counsel, Office of Emergency Services, Community Development, and the Agricultural Commissioner) and the Delta Counties Coalition (DCC). Water Resources will continue to support efforts to advocate for County positions, respond to proposed legislation, build and participate in coalitions, communicate County positions through media and other outreach avenues, and coordinate with various Delta and Statewide interests. Litigation regarding the Environmental Impact Report prepared for the tunnels is a possibility and supplemental funding may be necessary to support the DCC, should litigation be necessary.

Delta advocacy efforts for 2023-2024 are anticipated to focus on the following areas:

- Responding timely to tunnel environmental impact reviews by the State and Federal agencies.
- Improving and maintaining the system of levees that protect life and property for both agricultural and urban areas, which also supports the current system of through-Delta water exports.
- Advocating for continued access to Delta water supplies of sufficient quantity and quality for farmers, urban users, and the environment.
- Supporting efforts to have a healthy and viable Bay-Delta Estuary.
- Engaging in administrative and legal remedies in defense of the County's authority and the community's interest in the Delta.

In addition, Water Resources will continue to be supportive of the County's participation in the DCC, which consists of the counties of Contra Costa, Sacramento, San Joaquin, Solano, and Yolo. The DCC is active in the following areas:

- Engaging and building coalitions with agencies looking for alternative solutions to the Governor's Delta Tunnel Proposal.
- Committing to be highly involved in reformulating Statewide water policy.
- Responding to anticipated legislative and administrative proposals regarding drought and flood conditions, Statewide Water Policy, the California Water Action Plan, Delta Levee Investment Strategy, the Delta Plan, and the potential impact of Federal legislation on Delta water operations.
- Ensuring that State funding directed to the Delta is allocated to projects that benefit the Delta and are not used to mitigate State and Federal water project impacts on the Delta.
- Participating actively in legal and administrative proceedings tied to the Delta, including but not limited to the Delta Tunnel Proposal, State Water Project contract extensions, Delta Plan consistency, and the Water Quality Control Plan for the Bay-Delta.

# 2023060000—Public Works-Water Resources

## Roads & Facilities

Workload Data					
	Actual			Estimated	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>Development Reviews, Environmental Impact Reports, Other Agency Document Reviews</i>	53	53	55	65	65
<i>Investigation of Complaint - Violations</i>	8	8	10	15	20
<i>Central Valley Flood Protection Board Endorsements and Watercourse Encroachment Permits</i>	15	15	15	16	18
<i>Elevation Certificate Review</i>	35	40	40	40	40
<i>Flood Zone Inquiries</i>	60	60	60	65	65
<i>Plan Checks for Building Permits</i>	100	125	120	120	125
<i>Project Information Reviews</i>	25	25	25	25	25
<i>Conduct Groundwater Monitoring Investigations</i>	960	960	960	960	960
<i>Support and Attend Water Resources-Related Commission, Committee, and Board Meetings</i>	194	194	194	148	150
<i>Industrial Site Inspections</i>	19	14	14	19	48
<i>Commercial Site Inspections</i>	95	0	20	20	125
<i>Enforcement Actions</i>	5	0	2	5	5
<i>Public Outreach Activities</i>	35	35	24	24	35

# 2023070000—Public Works-Delta Activities

## Roads & Facilities

Fritz Buchman, Public Works Director

[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$467,434	\$625,909	\$783,224	\$783,224	\$157,315
Centrally-Budgeted Expenses	55,060	5,501	(73,224)	(73,224)	(78,725)
Operating Transfers Out	20,000	98,590	20,000	20,000	(78,590)
Total Appropriations	\$542,494	\$730,000	\$730,000	\$730,000	\$0
<b>Earned Revenues By Source</b>					
Operating Transfers In	\$670,000	\$730,000	\$730,000	\$730,000	\$0
Total Revenues	\$670,000	\$730,000	\$730,000	\$730,000	\$0
<b>Net County Cost</b>	(\$127,506)	\$0	\$0	\$0	\$0

## Purpose

The Delta Activities budget supports ongoing planning, legislative, outreach, and coalition-building activities that protect the County's interests in the Sacramento-San Joaquin Delta. Funding is provided to reimburse County departments for staff support, and to perform historical and technical research, legal services, public affairs, and legislative advocacy. The budget also funds the County's cost share of the Delta Counties Coalition (DCC) Coordinator.

## Major Budget Changes

### Services & Supplies

- \$78,590 Increase in professional services due to an accounting adjustment in the prior year.
- \$68,725 Increase in professional services for outside Counsel services.
- \$10,000 Increase in County Counsel services.

### Centrally-Budgeted Expenses

- \$21,264 Increase in Casualty insurance costs.
- (\$99,831) Cost Allocation Plan adjustment.

### Operating Transfers Out

- (\$78,590) Decrease in transfer to special district for the Mokelumne River Water Rights applications.

## Program Discussion

The 2023-2024 recommended budget for Delta Activities totals \$730,000, which reflects the Board of Supervisors' adopted policy to allocate 10% of Tobacco Settlement funds for Delta activities and other water-related matters. The recommended appropriations reflect no change from the 2022-2023 adjusted budget.

Major budget changes include increased appropriations for outside legal counsel. The County may elect to engage in litigation regarding the Environmental Impact Report and the Environmental Impact Statement prepared for the Delta Conveyance Project in the coming year, and supplemental funding may be necessary as a result.

Support and advocacy for the Sacramento-San Joaquin Delta continues to be among the Board's Legislative/Regulatory Platform. With two-thirds of the Delta located in San Joaquin County, it is an important natural resource locally and Statewide. The Board has engaged with a variety of interests to defend the Delta:

- Responding to the review process for a single tunnel conveyance project.

# **2023070000—Public Works-Delta Activities**

## **Roads & Facilities**

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- Improving and maintaining the system of levees that protect life and property for both agricultural and urban areas, which also supports the current system of through-Delta exports.
  - Advocating for continued access to Delta water supplies of sufficient quantity and quality for farmers, urban users, and the environment.
  - Supporting efforts to have a healthy and viable Bay-Delta Estuary.
  - Enhancing Delta maritime commerce and recreation.
  - Recognizing the Delta as a place.
  - Advocating for administrative and legal remedies in defense of the County's authority and the community's interest in the Delta.
- The County has also committed to participating in the Delta Counties Coalition (DCC), which consists of Contra Costa, Sacramento, Solano, San Joaquin, and Yolo counties. The DCC is active in the following areas:
- Engaging and building coalitions with agencies looking for alternative solutions to the Governor's proposed single tunnel conveyance project.
  - Committing to be highly involved in reformulating Statewide water policy.
  - Responding to anticipated legislative and administrative proposals regarding drought and flood conditions, Statewide water policy, the Water Resiliency Portfolio, Delta Levee Investment Strategy, the Delta Plan, and the potential impact of Federal and State legislation on Delta water operations.
  - Ensuring that State funding directed to the Delta is allocated to projects that benefit the Delta and are not used to mitigate State and Federal water projects with impacts on the Delta.
  - Participating actively in legal and administrative proceedings tied to the Governor's single tunnel conveyance project, State Water Project contract extensions, Delta Plan consistency, and the Water Quality Control Plan for the Bay-Delta.

# 3030900000—Community Infrastructure Engineering

## Roads & Facilities

Fritz Buchman, *Public Works Director*

[www.sigov.org/department/pwk](http://www.sigov.org/department/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,086,072	\$1,262,659	\$1,229,824	\$1,229,824	(\$32,835)
Services & Supplies	66,033	1,279,600	1,334,600	1,334,600	55,000
Centrally-Budgeted Expenses	30,654	23,355	24,862	24,862	1,507
Total Expenditures	\$1,182,759	\$2,565,614	\$2,589,286	\$2,589,286	\$23,672
Expenditure Reimbursements	(1,157,927)	(2,535,614)	(2,559,286)	(2,559,286)	(23,672)
Total Appropriations	\$24,832	\$30,000	\$30,000	\$30,000	\$0
<b>Earned Revenues By Source</b>					
Charges For Services	\$14,475	\$30,000	\$30,000	\$30,000	\$0
Miscellaneous Revenues	10,357	0	0	0	0
Total Revenues	\$24,832	\$30,000	\$30,000	\$30,000	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Staffing</b>					
Allocated Positions	7.0	7.0	7.0	7.0	0.0
Temporary (Full-Time Equivalent)	0.0	0.8	0.0	0.0	(0.8)
Total Staffing	7.0	7.8	7.0	7.0	(0.8)

## Purpose

The Community Infrastructure Engineering (CIE) Division performs administrative, financial, and rate-setting functions related to the County's Special Districts; provides technical and engineering support to the Utility Maintenance Division; processes zone formation and annexation proceedings; performs capital asset management; develops capital improvement projects for the Special Districts; and administers the Community Development Block Grant program for the Public Works Department. The CIE Division ensures the ongoing delivery of vital utility services that provide quality of life benefits to residents and businesses throughout the unincorporated County.

## Major Budget Changes

### Salaries & Employee Benefits

- \$37,258 Salary and benefits adjustments.
- (\$70,093) Decrease in extra-help.

### Services & Supplies

- \$55,000 Increase in professional services for design consultants.

### Expenditure Reimbursements

- \$23,672 Increase in reimbursement from Special Districts.

## Program Discussion

The 2023-2024 recommended budget for Community Infrastructure Engineering (CIE) totals \$2,589,286, which is an increase of \$23,672 from the 2022-2023 adjusted budget.

### Special Districts Administration

In 2023-2024, CIE will continue to focus on securing sufficient revenues to ensure long-term sustainability of County-administered Special Districts. This requires

3030900000—Community Infrastructure Engineering

Roads & Facilities

evaluating each utility rate structure as well as conducting cost-of-service analyses. California State law, Proposition 218, mandates that any increase in property-related fees or benefit assessments be approved by the affected property owners. Significant public outreach efforts are required to educate customers about the need for revised rate structures. Approximately 10% of the Districts will require rate adjustments annually to keep revenues aligned with expenses. Additional details regarding financially-challenged Districts and proposed rate increases for 2023-2024 are provided in the Special Districts budget narrative.

Providing utility services with constrained revenues continues to be a challenge when faced with increasing regulatory capital replacement and operations, and maintenance costs. Staff continue to seek legislative or regulatory actions that address the challenges of maintaining sustainable revenue levels under Proposition 218 requirements, particularly for small sewer, water, and storm drainage systems. Staff will continue to present a series of individual recommendations to the Board of Supervisors to address the long-term sustainability of the Special Districts over the next several years. Some of these recommendations may include District consolidations and strategic infrastructure financing mechanisms.

Aging infrastructure is an ongoing challenge for many of the Districts. CIE will continue to focus on the developing of capital projects to replace and repair critical infrastructure. To meet the needs for this effort, the recommended budget of \$1.1 million in professional services includes \$550,000 for design consultant services. These costs will be expensed to the affected Districts.

CIE has developed easy-to-access websites that provide a wealth of information to District customers, including District services and financial conditions, upcoming rate adjustments, and planned maintenance and construction activities. Customers can subscribe to their District web page to be notified when updates are made and/or additional information is posted. The recommended budget includes \$10,000 to continue website maintenance and upgrades to the Districts’ financial information.

CIE has continued efforts to acquire streetlights from PG&E, which will result in savings for district customers. Additionally, the conversion of streetlights to LED has decreased the number of service calls to the districts which is likely to result in long-term savings.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Special Districts Engineering Support</b>					
Engineer Reports	9	10	6	7	9
Special Districts Projects	8	8	4	6	8
<b>Special Districts Administration</b>					
Rate Adjustments	8	10	5	5	6
Special Districts Budgets	105	105	106	106	106
Street Light Service Calls	345	315	200	123	90

# 3031300000-3031700000—Public Works-Road Districts

## Roads & Facilities

Fritz Buchman, *Public Works Director*  
[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Road District 1	\$389,533	\$985,127	\$1,618,750	\$1,618,750	\$633,623
Road District 2	463,501	980,602	588,577	588,577	(392,025)
Road District 3	1,021,179	1,957,001	1,479,102	1,479,102	(477,899)
Road District 4	3,830,591	8,895,442	7,265,109	7,265,109	(1,630,333)
Road District 5	428,573	3,266,579	3,924,196	3,924,196	657,617
Total Appropriations	\$6,133,377	\$16,084,751	\$14,875,734	\$14,875,734	(\$1,209,017)
<b>Earned Revenues By Source</b>					
Taxes	\$9,163,459	\$9,097,439	\$9,579,175	\$9,579,175	\$481,736
Interest/Rents	83,974	80,500	653,000	653,000	572,500
Aid From Other Governments	56,768	57,686	54,901	54,901	(2,785)
Charges For Services	1,067	500	500	500	0
Fund Balance	(3,171,891)	6,848,626	4,588,158	4,588,158	(2,260,468)
Total Revenues	\$6,133,377	\$16,084,751	\$14,875,734	\$14,875,734	(\$1,209,017)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

Road District budgets provide funding primarily from property taxes for construction projects and road maintenance materials within the five County Road Districts. The County Ordinance Code established the five Road Districts under the authority set forth by the California Streets and Highways Code. Collectively, Road Districts receive approximately 1% of overall Countywide property tax revenues.

## Program Discussion

The 2023-2024 recommended budget for the Road Districts totals \$14,875,734, which is a decrease of \$1,209,017 from the 2022-2023 adjusted budget.

Road District funds are used to supplement the Public Works Road Fund to provide basic road-related services within the individual Road Districts. Monies raised in the particular Road District can only be expended on the road system within that District. Based upon recommendations from the Public Works Director, members of the Board of Supervisors approve the work to be performed in their respective District. In 2023-2024, Public Works assumes a 4% growth in the Road District property tax revenue.

The projected fund balance at June 30, 2023, for each Road District is:

Road District	Budget #	Fund #	Balance
District 1	3031300000	20013	\$3,361,095
District 2	3031400000	20014	\$1,558,878
District 3	3031500000	20015	\$2,226,269
District 4	3031600000	20016	\$9,430,111
District 5	3031700000	20017	\$5,162,414

Road District expenditures fund the following road-related activities:

- Road and bridge maintenance materials: signs, striping, railing, and pavement repairs.



# **3031300000-3031700000—Public Works-Road Districts**

## **Roads & Facilities**

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- Preventative maintenance: crack seal, chip seal, slurry seal, and surface restoration programs.
- Replacement of road maintenance equipment.
- Traffic signal and ferry operations (where applicable).
- Contract resurfacing and reconstruction.

Funds are prioritized for routine preventive maintenance activities. An emergency reserve is kept for items such as flood response, bridge damage, and collapsed pipes. Any remaining funds are earmarked for contract resurfacing and reconstruction projects on local roadways, which are not eligible for other State and Federal funding programs.

Crack sealing and chip seals are performed by Public Works maintenance staff, while slurry seals for the various Districts are combined into one project contract annually. In 2023-2024, it is anticipated that approximately 122 miles of

roads will be chip-sealed, approximately 33 miles will be slurry-sealed, and restoration and construction projects are anticipated on segments of Beecher Road, Confer Road, Cox Road, Eleventh Street, Ferguson Road, Holt Road, Kaiser Road, Lamb Road, Nelson Road, S. 99 Frontage Road (East), and W. Lorenzen Road, which totals approximately 12 miles.

### **Road District 4**

The Road District 4 budget includes \$2,382,000 for resurfacing of Beecher Road, Confer Road, Cox Road, and Ferguson Road in Stockton.

### **Road District 5**

The Road District 5 budget includes \$2,641,000 for resurfacing of Eleventh Street and S. 99 Frontage Road (East) in Stockton.

# 3039900000—PW-Community Infrastructure Program

## Roads & Facilities

Fritz Buchman, *Public Works Director*

[www.sigov.org/departments/pwk](http://www.sigov.org/departments/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$1,539,490	\$1,507,000	\$1,155,000	\$1,155,000	(\$352,000)
Loan to Other Funds	0	1,530,000	1,530,000	1,530,000	0
Total Appropriations	\$1,539,490	\$3,037,000	\$2,685,000	\$2,685,000	(\$352,000)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$116,095	\$113,000	\$462,000	\$462,000	\$349,000
Charges For Services	5,646,694	5,169,000	4,393,000	4,393,000	(776,000)
Fund Balance	(4,223,299)	(2,245,000)	(2,170,000)	(2,170,000)	75,000
Total Revenues	\$1,539,490	\$3,037,000	\$2,685,000	\$2,685,000	(\$352,000)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

The Community Infrastructure Program budget provides funding for the administration and management of the County's Development Impact Fee programs. These fees provide a method to equitably assess new development for the impact on community infrastructure. The department of Public Works collects the impact fees for traffic mitigation, regional transportation, and water facilities.

This Program includes budgets:

- 3039900000 Community Infrastructure-Traffic Impact Mitigation Fee (TIMF)
- 3039902000 Community Infrastructure-Regional Transportation Impact Fee (RTIF)

## Major Budget Changes

### Services & Supplies

- \$45,000 Increase in distribution to San Joaquin Council of Governments (SJCOG) resulting from increased RTIF collected.
- (\$315,000) Decrease in water impact fees for Stockton East Water District.
- (\$82,000) Decrease in costs related to internal administration and other costs associated with the RTIF program.

### Revenues

- (\$75,000) Decrease in contribution to fund balance.
- \$510,000 Increase in RTIF collection.
- \$349,000 Increase in interest income.
- (\$971,000) Decrease in TIMF collection.
- (\$315,000) Decrease in Water Impact Mitigation Fee collection.

# 3039900000—PW-Community Infrastructure Program

## Roads & Facilities

### Program Discussion

The 2023-2024 recommended budget for the Community Infrastructure Program totals \$2,685,000, which is a decrease of \$352,000 from the 2022-2023 adjusted budget.

Project expenses anticipated to occur during 2023-2024 are as follows:

Project Expenses	Amount
Design of Grant Line Rd Realignment Project	\$500,000
San Joaquin Council of Governments (SJCOG) share of RTIF fees collected	225,000
Water impact mitigation fees and related administration expenses	315,000
<b>Total</b>	<b>\$1,040,000</b>

The remaining fund balance in fund #20039 Community Infrastructure is earmarked for future studies and construction of road segments identified in the TIMF and RTIF programs.

### Traffic Impact Mitigation Fee (TIMF)

The TIMF program provides funding for transportation system improvements needed to accommodate the impact of new development. TIMF collections for future improvements occur over several years and are used for matching other State, Federal, and local funds on projects. A report referencing the projects targeted for TIMF funding is prepared following each fiscal year. Fee programs of this type requires updates every five years. The latest update was completed in 2022 and approved by the Board of Supervisors on December 13, 2022 (B-22-656).

Many of the projects targeted for TIMF funding are multiyear projects. The fund balance that remains at the end of 2022-2023 is retained in the program for completion of planned projects.

The projected June 30, 2023 balance of TIMF funds is \$21.0 million. In 2023-2024, revenues from the TIMF program are projected at \$1,390,000 with expenditures estimated at \$550,000 for project design, construction, and program administration. The anticipated expenditures from the TIMF Program include up to \$1.5 million in loans to several Special Districts for the acquisition of 2,800 street lights. These loans would be repaid over 10 years in accordance with terms of Board Order B-21-438. Due to delay, these projects have been carried over from 2022-2023.

### Regional Transportation Impact Fee (RTIF)

The RTIF program was adopted by the County and all cities (Escalon, Lathrop, Lodi, Manteca, Ripon, Stockton, and Tracy) in 2006. The fee is based on land use and is the same throughout all jurisdictions. RTIFs are applied to specific regional transportation projects including highways, interchanges, and regional roads to help fund additional improvements needed to mitigate regional impacts from new development. The program requires all agencies (including the County) to forward 10% and 5% of fees collected to San Joaquin Council of Governments (SJCOG) for mainline highway and transit projects, respectively. Additionally, all cities are required to forward an additional 10% of the fees collected to the County for regional road projects. The latest update of the RTIF program began in late 2022 and expected to be completed by calendar year-end 2023.

The projected June 30, 2023 of RTIF fund balance is \$22.0 million. For 2022-2023, revenues from the RTIF program are projected at \$3,150,000. Expenditures are estimated at \$290,000, for project development and program administration.

### Water Facility Fee

Water facility fees, collected on behalf of the Stockton East Water District, fund the County's share of the costs of water conveyance facilities and are disbursed to Stockton East Water District on a quarterly basis. In 2023-2024, water fee revenue and disbursements are projected to be \$315,000.

# Summary

## All Airport Budgets

Richard J. Sokol, Airport Director  
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Enterprise Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,747,726	\$1,936,978	\$2,112,621	\$2,112,621	\$175,643
Services & Supplies	2,861,321	3,131,915	2,636,053	2,636,053	(495,862)
Centrally-Budgeted Expenses	297,599	345,292	358,066	358,066	12,774
Capital Expenditures	5,987,213	21,239,795	9,873,109	9,873,109	(11,366,686)
Total Expenditures	\$10,893,859	\$26,653,980	\$14,979,849	\$14,979,849	(\$11,674,131)
Expenditure Reimbursements	(12,000)	0	0	0	0
Total Appropriations	\$10,881,859	\$26,653,980	\$14,979,849	\$14,979,849	(\$11,674,131)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$1,489	\$1,000	\$25,000	\$25,000	\$24,000
Miscellaneous Revenues	2,286	0	0	0	0
Operating Transfers In	12,403,032	12,436,825	953,789	953,789	(11,483,036)
Airport Special Revenues	10,683,762	14,216,155	13,605,193	13,605,193	(610,962)
Fund Balance	(12,208,710)	0	395,867	395,867	395,867
Total Revenues	\$10,881,859	\$26,653,980	\$14,979,849	\$14,979,849	(\$11,674,131)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	16.0	16.0	16.0	16.0	0.0

## Purpose

This is a summary of the budgets administered by the Airport Director: Airport Enterprise Fund (9230901000) and Airport Capital Projects (9231000000).

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Demonstrate Leadership Development	Current	Target	Deadline
➤ Develop formal mentorship and job training programs to maximize employee development and engagement.	No formal program	Documented programs with activities and resources	June 2024

# Summary

## All Airport Budgets

Augment Digitization and Automation	Current	Target	Deadline
➤ Digitize old leases, permits, contracts, etc. to reduce paper documents, improve efficiency, and implement an electronic system to facilitate notification to tenants and staff for expiring leases, lease options, permits, and insurance requirements.	30%	60%	June 2024
	60%	100%	June 2025
<b>Fiscal Optimization</b>			
Effectively Manage One-Time Funds	Current	Target	Deadline
➤ Develop a project list and revise as necessary to utilize 100% of funding available by grant expiration dates to improve airport infrastructures and services.			
➤ Coronavirus Aid, Relief, and Economic Security Act (CARES) – \$18.6 Million.	46%	100%	June 9, 2024
➤ Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) – \$1.5 Million.	8%	100%	March 25, 2025
➤ American Rescue Plan Act (ARPA) – \$2.3 Million.	10%	100%	August 10, 2025
<b>Economic Development</b>			
Increase Transportation/Logistics/Warehousing Businesses	Current	Target	Deadline
➤ Increase outreach to cargo operators to increase daily lift by 50%.	1 carrier	2 carriers	June 2025
➤ Update Air Service recruitment program to add 400 daily scheduled departure seats.	240 departure seats	640 departure seats	June 2023

# Airport Enterprise Fund

## Roads & Facilities

Richard J. Sokol, Airport Director  
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Enterprise Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,747,726	\$1,936,978	\$2,112,621	\$2,112,621	\$175,643
Services & Supplies	2,861,321	3,131,915	2,636,053	2,636,053	(495,862)
Centrally-Budgeted Expenses	297,599	345,292	358,066	358,066	12,774
Capital Expenditures	837,413	565,541	1,102,585	1,102,585	537,044
Total Expenditures	\$5,744,059	\$5,979,726	\$6,209,325	\$6,209,325	\$229,599
Expenditure Reimbursements	(12,000)	0	0	0	0
Total Appropriations	\$5,732,059	\$5,979,726	\$6,209,325	\$6,209,325	\$229,599
<b>Earned Revenues By Source</b>					
Interest/Rents	\$1,489	\$1,000	\$25,000	\$25,000	\$24,000
Miscellaneous Revenues	2,286	0	0	0	0
Operating Transfers In	639,826	639,826	639,826	639,826	0
Airport Special Revenues	5,926,526	5,338,900	5,544,499	5,544,499	205,599
Fund Balance	(838,068)	0	0	0	0
Total Revenues	\$5,732,059	\$5,979,726	\$6,209,325	\$6,209,325	\$229,599
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	16.0	16.0	16.0	16.0	0.0

- Operating Transfers In includes a General Fund contribution of \$639,826 for 2023-2024.

## Purpose

The Stockton Metropolitan Airport (Airport) serves the commercial, corporate business, and general aviation needs of San Joaquin County. The Airport is in a foreign trade zone and is conveniently located and easily accessible by two major north-south arterials in California – Interstate 5 and State Route 99.

The Department of Aviation operates and maintains the Airport to meet the highest standards through application of its core values – Safety, Commitment, and Knowledge. The Department also manages numerous tenant agreements and facilities; provides a safe and efficient facility for the operation of aircraft; promotes development of Airport property for aviation and commercial-related services; obtains and administers Federal Aviation Administration (FAA) grants; and reviews all development proposals within the Airport's sphere-of-influence to ensure compatibility with Federal, State, and local standards.

## Major Budget Changes

### Salaries & Employee Benefits

- \$159,892 Salary and benefits adjustments.
- \$11,001 Increase in overtime costs.
- \$4,750 Increase in holiday pay.

### Services & Supplies

- (\$400,000) Decrease in costs for security patrol services.
- (\$113,128) Decrease in consultant services costs due to completion of terminal remodeling projects, and Per- and Polyfluoroalkyl Substances (PFAS)

# Airport Enterprise Fund

## Roads & Facilities

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and Passenger Facility Charge (PFC) planning projects.

- (\$30,000) Decrease in costs for maintenance of Airport facilities.

### Centrally-Budgeted Expenses

- \$46,553 Increase in Workers' Compensation and Casualty insurance costs.
- \$20,199 Increase in data processing charges.
- (\$56,394) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$100,000 Terminal signage.
- \$50,000 Forklift.
- \$50,000 Front loader bucket attachment.
- \$50,000 Herbicide spraying equipment.
- \$16,000 LED lighting.
- \$10,000 Backhoe attachment.
- \$5,000 Mower.

### Capital Expenditures - Structures & Improvements

- \$400,000 Per- and Polyfluoroalkyl Substances (PFAS) Investigation.
- \$310,000 San Joaquin Council of Governments Measure K Expenditure Plan interest-only loan payment.
- \$111,585 B Street slurry seal.

### Revenues

- \$563,536 Increase in reimbursement from Coronavirus Aid, Relief, and Economic Security (CARES) Act grant for operating expenses.
- (\$252,293) Decrease in reimbursement from Worldwide Flight Services (WFS) for security patrol services.
- (\$103,984) Decrease in lease revenue for Airport office space.

## Program Discussion

The 2023-2024 recommended Stockton Metropolitan Airport (Airport) budget totals \$6,209,325, which is an increase of \$229,599 from the 2022-2023 adjusted budget.

The Airport continues to strive to improve its financial position and build a sufficient fund balance to support the cost of deferred maintenance that has grown over the years. Revenue is generated from passenger parking, ground and building leases, terminal office leases, landing fees, and fuel flowage fees; however, these revenues are not sufficient to maintain core infrastructure needs, such as repairs to roads in the Airport Industrial Park or rehabilitation and replacement of the commercial terminal.

The 2023-2024 recommended budget includes continued County support of the Airport by providing a General Fund contribution of \$639,826 to the Airport Enterprise Fund. The County will leverage all financial contributions to the Airport in negotiations with the FAA for current and future land opportunities related to the Airpark 599 development project.

### COVID-19 Recovery

The Airport and its tenants continue to feel the long-term impact of the COVID-19 pandemic and the slow economic recovery.

Allegiant Air is well established at the Airport and was providing up to 16 flights per week prior to the COVID-19 pandemic. Allegiant is now recovering, providing 13 flights per week with passenger levels at nearly 79% of pre-pandemic.

Revenue streams that are primarily driven by aviation activities, such as fuel-flowage and landing fees, have remained relatively constant. Revenue realized from parking fees was reduced by over 52% during the pandemic and is almost back to pre-pandemic levels. It remains uncertain how the impact of the pandemic overall or the emergence of COVID-19 variants may impact Airport revenue streams in 2023-2024.

Other businesses continue to be affected by the slow economic recovery, including the restaurant, vending concessionaire, and the small leisure travel business.

The Department will continue to closely monitor economic indicators and Airport activity in 2023-2024 and may return to the Board of Supervisors for midyear budget adjustments. As a contingency plan, should the current economic conditions and ongoing impact of the pandemic continue to affect air travel through 2023-2024, the Airport will continue to implement various cost reduction measures. These actions may include, but are not limited to, reducing travel expenses

# Airport Enterprise Fund

## Roads & Facilities

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and evaluating strategies to reduce utility and other operations expenditures.

### *Coronavirus Aid, Relief, and Economic Security (CARES) Act Airport Grant Funding*

In June 2020, the Airport received approximately \$18.6 million in CARES Act funding from the FAA. The grant can be used for Airport capital projects (with FAA approval), payroll, utilities, and other airport operations and maintenance needs. As of March 31, 2023, the Airport has used \$2.7 million for payroll and utilities costs, \$208,127 for the Pavement Maintenance Management Plan, and \$5.6 million out of a total of \$8.4 million allocated to the Rehabilitate General Aviation Taxilane project. The 2023-2024 recommended Airport budget includes a reimbursement from the CARES Act Airport grant of \$2,228,762 for operations and maintenance expenses. Approximately \$4.9 million of funding is available for expense allocation. The Airport will use these remaining funds for reimbursement of expenses for large maintenance projects (e.g., Lindbergh Street Rehabilitation) and contracted services (e.g., Montezuma Fire District, Sherriff's Office). CARES Act grant funding must be utilized by June 9, 2024.

### *Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) Airport Grant Funding*

In March 2021, the FAA notified the Airport that it would receive approximately \$1.5 million in CRRSAA funding. While similar to the CARES Act grant, CRRSAA funds can only be used to assist Airports with efforts to prevent, prepare for, and respond to the pandemic with additional guidance for its use to offset additional COVID-19 cleaning expenses incurred by the Airport during the pandemic period. As of March 31, 2023, the Airport has utilized a total of \$171,000. The Airport will leverage these funds to cover operations and maintenance expenses after the CARES Act grant has expired. CRRSAA grant funding must be utilized by March 31, 2025.

### *American Rescue Plan Act (ARPA) Airport Grant Funding*

In August 2021, the FAA notified the Airport that it would receive approximately \$2.3 million in ARPA funding. While

similar to the CARES Act grant, ARPA funds can only be used to assist Airports with efforts to prevent, prepare for, and respond to the COVID-19 pandemic. As of March 31, 2023, the Airport has utilized a total of \$544,000. The Airport will leverage these funds to cover operations and maintenance expenses after the CARES Act grant has expired. Remaining grant funds must be utilized by August 11, 2025.

### **Air Services**

Allegiant Air continues to provide service to Harry Reid International Airport, Las Vegas, Nevada, and Phoenix Sky Harbor International Airport, Phoenix, Arizona. The Airport has ongoing discussions with Allegiant Air management regarding opportunities for additional flight destinations and increased frequency on existing routes.

### *Regaining Air Carrier Market Share*

San Joaquin Valley demographics are rapidly changing as Bay Area residents and businesses seek greater opportunities east, away from highway congestion and high real estate prices. In 2023-2024, the Airport will introduce an 'airport visioning' initiative. This would involve the combined efforts of a specialized air service consultant, architect, and civil engineer. The goal will be to reassess the County's role in the Northern California air service market, and identify bold new initiatives that could help the Airport retain and return market share from surrounding facilities.

## Fund Balances

The Airport maintains two Enterprise Funds established for maintenance, operations, and capital improvements.

### *Airport Enterprise Fund (#39023)*

As of March 31, 2023, the fund balance totaled \$3,605,149.

### *Airport Passenger Facility Charges Program Fund (#39700)*

As of March 31, 2023, the fund balance totaled \$607,966.



# Airport Enterprise Fund

## Roads & Facilities

### Workload Data

	<u>Actual</u>			<b>Est./Act.</b>	<b>Projected</b>
	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>2023-2024</b>
<b>Commercial Passengers</b>					
<i>Enplanements</i>	79,528	49,973	76,148	72,851	73,580
<i>Deplanements</i>	78,786	49,173*	75,904	72,698	73,425
<b>Total</b>	<b>158,314</b>	<b>99,146</b>	<b>152,052</b>	<b>145,549</b>	<b>147,005</b>
<b>Aircraft Operations</b>					
<i>Air Carrier</i>	2,518	2,495	2,254	2,322	2,345
<i>Air Taxi</i>	2,541	1,491	2,135	2,199	2,221
<i>Military</i>	3,001	2,699	4,172	4,297	4,297
<i>General Aviation</i>	59,024	43,757	41,039	42,270	43,116
<b>Total</b>	<b>67,084</b>	<b>50,442</b>	<b>49,600</b>	<b>51,088</b>	<b>51,979</b>

*\*Restated*

# Airport Capital Projects

## Roads & Facilities

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Enterprise Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Capital Expenditures</i>	\$5,149,800	\$20,674,254	\$8,770,524	\$8,770,524	(\$11,903,730)
<i>Total Appropriations</i>	\$5,149,800	\$20,674,254	\$8,770,524	\$8,770,524	(\$11,903,730)
<b>Earned Revenues By Source</b>					
<i>Operating Transfers In</i>	\$11,763,206	\$11,796,999	\$313,963	\$313,963	(\$11,483,036)
<i>Airport Special Revenues</i>	4,757,236	8,877,255	8,060,694	8,060,694	(816,561)
<i>Fund Balance</i>	(11,370,642)	0	395,867	395,867	395,867
<i>Total Revenues</i>	\$5,149,800	\$20,674,254	\$8,770,524	\$8,770,524	(\$11,903,730)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

The Airport Capital Projects budget includes capital improvement projects in support of Stockton Metropolitan Airport (Airport) efforts to plan, operate, and maintain the safety and appearance of the Airport to meet the highest standards. The Airport prioritizes capital project development to address safety and capacity infrastructure needs. Project phases typically include scope development, environmental clearance, design, engineering, and construction.

## Major Budget Changes

### Capital Expenditures - Structures & Improvements

- \$2,694,692 Rehabilitate cargo taxilane.
- \$2,500,000 Fence realignment for baggage.
- \$1,700,000 Lindbergh Street rehabilitation.
- \$737,586 Rehabilitate general aviation taxilane.
- \$666,798 Airport Layout Plan update.
- \$395,867 Cargo apron expansion.
- \$75,581 Terminal security access control.

### Revenues

- (\$485,281) Decrease in Federal Aviation Administration (FAA) reimbursement for capital projects.
- (\$331,280) Decrease in Measure K Fund reimbursement for capital projects.

### Operating Transfers In

- \$116,964 Increase in transfers from the Passenger Facility Charges (PFC) program fund.
- (\$11,600,000) Decrease in transfers from the Capital Outlay Fund for the Cargo Apron Expansion project.

## Program Discussion

The 2023-2024 recommended Airport Capital Projects budget totals \$8,770,524, which is a decrease of \$11,903,730 from the 2022-2023 adjusted budget.

The following projects will improve Airport, passenger, and tenant security and safety; increase the useful life of taxilanes, infrastructure and facilities; and support the long-term planning and development of the Airport.

### Terminal Security System Access Control

The terminal security system access control project, which was approved in 2020-2021, began in late spring 2021. The project entails replacement of the current aging security

# Airport Capital Projects

## Roads & Facilities

system including access card readers, gates, security cameras, and the installation of an onsite security system server facility. The total estimated cost for this project is \$2.67 million and due to a number of delays, construction is anticipated to be completed in the first quarter of 2023-2024.

### Cargo Apron Expansion Project

The Cargo Apron Expansion project will double the available parking space and provide the capacity to serve up to eight cargo aircraft operating at the Airport. Construction is scheduled to be completed in the fourth quarter of 2022-2023 and project close out will occur in the first quarter of 2023-2024.

### Pavement Rehabilitation Projects

The Cargo Taxilane and Lindbergh Street rehabilitation projects will replace deteriorating pavement on and off the airfield. The total estimated cost of the Cargo Taxilane rehabilitation project is \$2.7 million and construction is anticipated to be completed in the first quarter of 2023-2024. The total estimated cost of the Lindbergh Street rehabilitation project is \$1.7 million and construction is anticipated to be completed in the fourth quarter of 2023-2024.

### Airport Layout Plan

The Airport Layout Plan (ALP) update project will allow the Airport to plan for future development while meeting the requirements of Grant Assurance No. 29, which obligates an airport sponsor to keep the ALP up to date. Additionally, any proposed Airport Improvement Program or Passenger Facility Charge funded projects must be included on an approved ALP. The total estimated cost for this project is \$1.1 million and the recommended 2023-2024 budget includes \$666,798 for the update, which is anticipated to be completed in the fourth quarter of 2023-2024.

### Extension of Measure K Loan Agreement

In 2014, the San Joaquin Council of Governments (SJCOG) Measure K Strategic Plan was amended to include the Airport in the Measure K Ordinance and Expenditure Plan to be eligible for additional funds for capital improvements. In 2015-2016, SJCOG approved an interest-only loan of \$9.7 million with a 3.87% interest rate for five years. The funding is used to modernize aging infrastructure and equipment.

The Airport has allocated \$8.8 million of Measure K funding for multiple projects to improve safety, terminal efficiencies, and Americans with Disabilities Act compliance.

Measure K Funding Allocated	
Project Name	Amount
AIP 39 Overtime	\$9,520
Aircraft Rescue and Fire Fighting Vehicle	82,943
Airport Security Systems Repair	30,000
Cargo North Pad	932,876
Category II Instrument Landing System (CAT II ILS)	3,397,342
Customs and Border Protection Concept	100,600
Federal Inspection Station	10,467
Per- and Polyfluoroalkyl Substances (PFAS)	150,000
Public Works Access Road Extension	220,591
Public Works PAPI	280,750
Rehabilitate General Aviation Taxilane	737,586
RS&H CATEX CAT II ILS	25,532
RS&H Precision Approach Path Indicator (PAPI)	47,500
Small Community Air Service Development Program (SCASDP)	936,134
Taxiway D Pavement Repairs	75,427
Terminal Electrical Vault (Generator)	690,989
Terminal Security Access Control	1,070,917
<b>Total</b>	<b>\$8,799,174</b>
<b>Remaining Loan Funding Available</b>	<b>\$900,826</b>

On April 7, 2020, the Board of Supervisors approved a three-year extension of the financing agreement and promissory note through June 2023 (B-20-174). The extension enabled the Airport to program additional projects. The Airport will bring forward a recommendation to the Board of Supervisors in the fourth quarter of 2022-2023 for an additional extension to utilize the remaining balance of approximately \$900,826 of available Measure K loan funds. The estimated interest payment due in June 2024 is \$310,000 and is included in the recommended Airport Enterprise Fund budget (#9230901000).

# Airport Capital Projects

## Roads & Facilities

### COVID-19 Recovery

#### Coronavirus Aid, Relief, and Economic Security Act (CARES) Airport Grant Funding

In June 2020, the Airport received approximately \$18.6 million in CARES Act funding from the FAA. The grant can be used for Airport capital projects (with FAA approval), payroll, utilities, and other airport operations and maintenance needs. As of March 31, 2023, the Airport has used \$2.7 million for payroll and utilities costs, \$208,127 for the Pavement Maintenance Management Plan, and \$5.6 million out of a total of \$8.4 million allocated to the Rehabilitate General Aviation Taxilane project. The 2023-2024 recommended Airport Enterprise Fund budget (#9230901000) includes a reimbursement of \$2,228,762 for operations and maintenance expenses. Approximately \$4.9 million of funding is available for expense allocation. CARES Act grant funding must be utilized by June 9, 2024.

#### Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) Airport Grant Funding

In March 2021, the FAA notified the Airport that it would receive approximately \$1.5 million in CRRSAA funding. While similar to the CARES Act grant, CRRSAA funds can only be used to assist Airports with efforts to prevent, prepare for, and respond to the COVID-19 pandemic. The Airport is working closely with the FAA to ensure documentation for CRRSAA grant funding is completed in an expeditious manner to ensure funds are available when needed. As of March 31, 2023, the Airport has utilized a total of \$171,000. The Airport will leverage these funds to cover operations and maintenance expenses after the CARES Act grant has expired. CRRSAA grant funding must be utilized by March 31, 2025.

### 2023-2024 Proposed Capital Projects Budget

(with projected sources of funding by project)

Description	FAA	Local*	Total
Terminal Security Access System	\$0	\$75,581	\$75,581
Cargo Apron Expansion	0	395,867	395,867
Rehabilitate General Aviation Taxilane	737,586	0	737,586
Rehabilitate Cargo Taxilane Construction	2,443,008	251,684	2,694,692
Lindbergh Street Rehabilitation	1,700,000	0	1,700,000
Fence Realignment For Baggage	2,500,000	0	2,500,000
Airport Layout Plan Update	604,519	62,279	666,798
<b>Total**</b>	<b>\$7,985,113</b>	<b>\$785,411</b>	<b>\$8,770,524</b>

\*Local funding sources include Measure K, Airport Enterprise Fund (#39023), and Airport Passenger Facility Charges Program Fund (#39700).

\*\*These amounts are based on engineer estimates. Actual costs and timing of reimbursements may vary significantly.



ADOPTED BUDGET

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*Health Services*

# Health Services

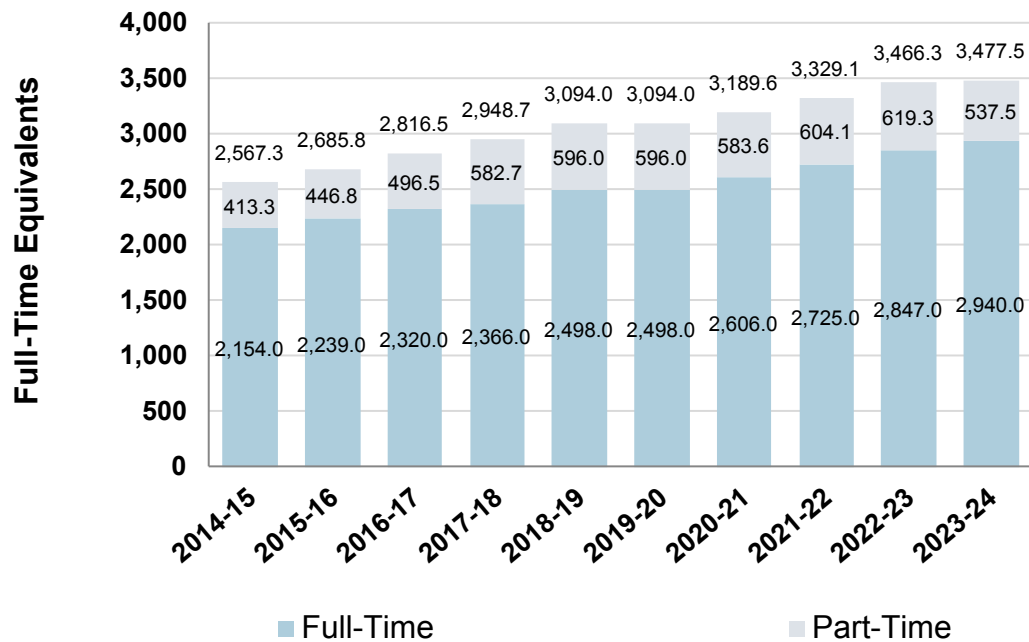
## Appropriations

	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Summary — All Health Care Services</b>	F-4				
<b>Budgets</b>					
4040300000 Mental Health Pharmacy	F-9	\$11,284,835	\$13,777,069	\$13,777,069	\$2,492,234
4040500000 Mental Health Services	F-11	245,075,106	273,513,396	273,513,396	28,438,290
4040600000 Substance Use Disorder Services	F-18	28,376,388	35,908,285	35,908,285	7,531,897
4040700000 Behavioral Health Admin	F-22	1,207,359	1,207,359	1,207,359	0
4041000000 Public Health Services	F-25	48,283,132	53,090,001	53,090,001	4,806,869
4041200000 Public Guardian/ Conservator	F-31	4,074,893	4,779,584	4,779,584	704,691
4041800000 Emergency Medical Services	F-34	3,638,871	4,175,333	4,175,333	536,462
4045415000 California Children's Services	F-38	7,463,056	7,862,364	7,862,364	399,308
4049500000 Health Care Services Administration	F-40	0	0	0	0
4049600000 Whole Person Care Program	F-42	1,833,143	2,482,954	2,482,954	649,811
4049700000 Office of the Medical Examiner	F-46	6,305,856	6,274,839	6,274,839	(31,017)
4049800000 County Support to PPH-FQHC	F-49	0	0	0	0
<b>Public Works</b>					
4040800000 Utility Districts	F-51	8,800	8,800	8,800	0
9210000000 Solid Waste Enterprise Fund	F-53	38,268,054	42,794,767	42,794,767	4,526,713
9312000000 CSA 31 Sewer Enterprise Fund	F-58	1,270,493	1,306,288	1,306,288	35,795
4042000000 Environmental Health	F-60	10,402,006	11,044,713	11,044,713	642,707
4049100000 Children & Families Program (First 5)	F-66	2,104,208	1,866,082	1,866,082	(238,126)
4049400000 Operating Transfers to Health Care	F-70	43,166,123	43,166,123	43,166,123	0
9221100000 Hospital Enterprise Fund	F-72	446,497,980	483,357,353	483,357,353	36,859,373
<b>Total - Health Services</b>		<b>\$899,260,303</b>	<b>\$986,615,310</b>	<b>\$986,615,310</b>	<b>\$87,355,007</b>

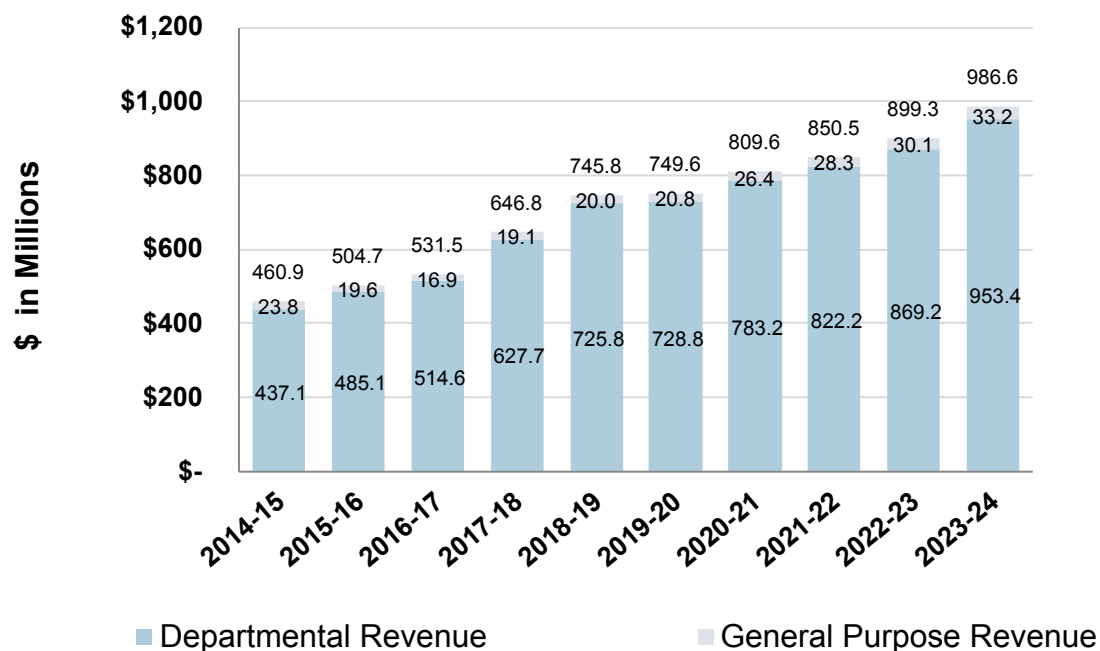
# Health Services

## Appropriations

### Staffing Trend

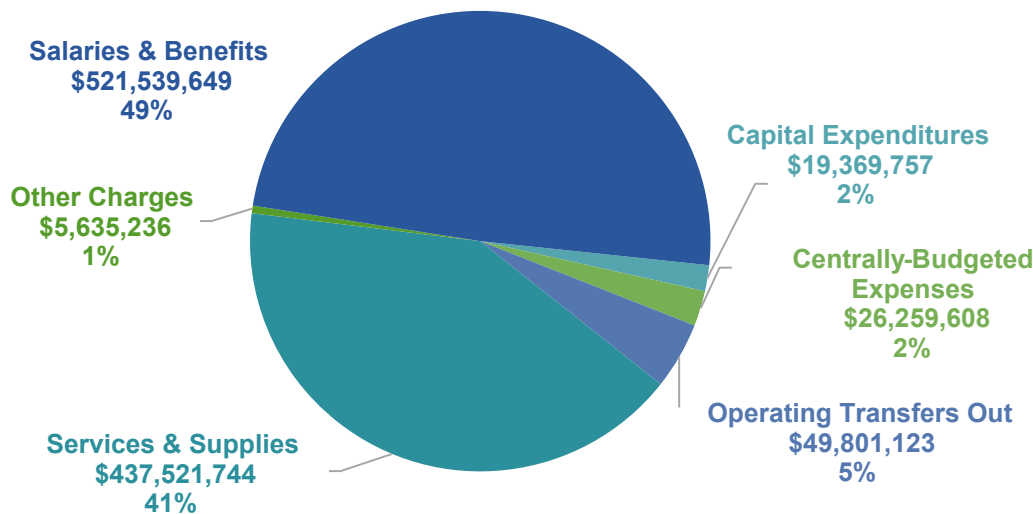


### Appropriations by Source



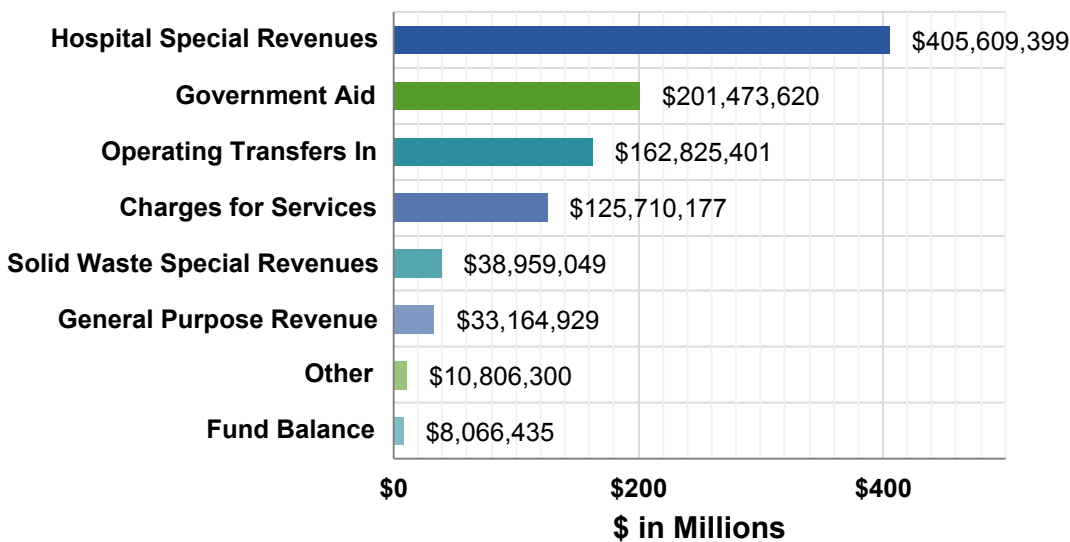
Health Services  
Appropriations

Use of Funds  
2023-2024 Adopted Budget  
Total Appropriations \$986,615,310 \*



\* \$1,060,127,117 Expenditures less \$73,511,807 Cost Reimbursements

Source of Funds  
2023-2024 Adopted Budget  
Total Revenue \$986,615,310





# Summary

## All Health Care Services Budgets

Greg Diederich, Health Care Services Director  
[www.sjgov.org/departments/hcs](http://www.sjgov.org/departments/hcs)

	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$129,099,156	\$174,054,783	\$194,274,204	\$194,274,204	\$20,219,421
Services & Supplies	118,935,059	204,353,376	245,655,885	245,655,885	41,302,509
Centrally-Budgeted Expenses	6,236,764	7,305,470	8,367,900	8,367,900	1,062,430
Other Charges & Uses	22,849,226	25,567,565	21,014,082	21,014,082	(4,553,483)
Capital Expenditures	2,238,021	4,374,965	7,156,137	7,156,137	2,781,172
Operating Transfers Out	2,038,066	12,900,000	6,355,000	6,355,000	(6,545,000)
Total Expenditures	\$281,396,292	\$428,556,159	\$482,823,208	\$482,823,208	\$54,267,049
Expenditure Reimbursements	(30,069,806)	(38,510,228)	(43,738,779)	(43,738,779)	(5,228,551)
Total Appropriations	\$251,326,486	\$390,045,931	\$439,084,429	\$439,084,429	\$49,038,498
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$1,183,855	\$1,186,885	\$1,194,585	\$1,194,585	\$7,700
Fines/Forfeitures/Penalties	1,099	1,500	500	500	(1,000)
Interest/Rents	131,907	515,000	515,000	515,000	0
Aid From Other Governments	151,398,016	122,825,036	134,156,195	134,156,195	11,331,159
Charges For Services	88,585,463	97,844,697	114,974,323	114,974,323	17,129,626
Miscellaneous Revenues	524,054	318,249	893,428	893,428	575,179
Operating Transfers In	8,913,086	117,491,920	138,599,266	138,599,266	21,107,346
Fund Balance	(21,717,200)	12,819,839	5,830,816	5,830,816	(6,989,023)
Total Revenues	\$229,020,280	\$353,003,126	\$396,164,113	\$396,164,113	\$43,160,987
<b>Net County Cost</b>	\$22,306,206	\$37,042,805	\$42,920,316	\$42,920,316	\$5,877,511
<b>Allocated Positions</b>	1,170.0	1,209.0	1,254.0	1,254.0	45.0
<b>Temporary (Full-Time Equivalent)</b>	194.5	166.3	164.1	164.1	(2.1)
<b>Total Staffing</b>	1,364.5	1,375.3	1,418.1	1,418.1	42.9

- Operating Transfers In includes a General Fund Contribution of \$3,647,001 representing the Minimum Maintenance of Effort required of \$1,395,617 and a Discretionary Contribution of \$2,251,384.

This is a summary of the 14 budgets administered by the Director of Health Care Services (HCS) consisting of:

- 2022621000 Correctional Health Services
- 4040300000 Mental Health Pharmacy
- 4040500000 Mental Health Services
- 4040600000 Substance Use Disorder Services
- 4040700000 Behavioral Health Administration
- 4041000000 Public Health Services (PHS)
- 4041200000 Public Guardian/Conservator
- 4041800000 Emergency Medical Services
- 4045415000 California Children's Services
- 4049500000 HCS Administration
- 4049600000 Whole Person Care Program
- 4049700000 Office of the Medical Examiner (OME)
- 5055246000 Neighborhood Preservation
- 5055600000 Veterans Services Office

# Summary

## All Health Care Services Budgets

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
<ul style="list-style-type: none"> <li>➤ <i>Office of the Medical Examiner</i> Improve staffing rates by maintaining current staff and filling all vacancies. The referenced classifications have the listed percentage of allocated positions unfilled.</li> </ul>	Sup. Death Investigator 50% Death Investigator 20% Office Assistant 33% Forensic Autopsy Tech 33%	0% - Fully staffed	December 2023
<ul style="list-style-type: none"> <li>➤ <i>Public Health Services</i> Institute a formal curriculum for nursing student interns designed to enhance their practicum experience and consideration of Public Health as a career.</li> </ul>	Not started	Completed	June 2023
<ul style="list-style-type: none"> <li>➤ <i>Behavioral Health Services (BHS)</i> Work with Human Resources (HR) to identify new recruitment strategies and ensure vacancies are posted and filled timely, and reduce departmental vacancy rates by five percentage points.</li> </ul>	25.7%	20.7%	June 2025
<ul style="list-style-type: none"> <li>➤ <i>Veterans Services Office</i> Hire three full-time Veterans Services Representatives.</li> </ul>	In progress	Completed	June 2023
Formalize Succession Planning	Current	Target	Deadline
<ul style="list-style-type: none"> <li>➤ <i>Emergency Medical Services</i> Work with HR on class study to combine/reclassify Regional Disaster Medical Health Coordinator and EMS Specialist positions to create series as needed; ensure Organizational Charts are logical and match mobility paths; and ensure job descriptions/duties align with workflow and Organizational Chart.</li> </ul>	Not started	Completed	December 2024
<ul style="list-style-type: none"> <li>➤ <i>Behavioral Health Services</i> Partner with HR to review current administration leadership roles and create appropriate BHS leadership job descriptions which support succession planning.</li> </ul>	Not started	Completed	December 2024
Demonstrate Leadership Development	Current	Target	Deadline
<ul style="list-style-type: none"> <li>➤ <i>Health Care Services Agency</i> All members of the Agency's management team will complete relevant NIMS/SIMS 300/400/700 training.</li> </ul>	0%	100%	June 2024

# Summary

## All Health Care Services Budgets

➤ <i>Public Health Services</i> All PHS managers and supervisors will have completed the Department's one-year intensive leadership training institute conducted by Max Potential, incorporating at least three elements from coursework into everyday practice.	0%	100%	June 2023
Augment Digitization and Automation	Current	Target	Deadline
➤ <i>Correctional Health Services</i> Complete RFP and convert to a new Electronic Medical Health Records System.	In progress	Completed	June 2024
➤ <i>Behavioral Health Services</i> Implement regional electronic health records system.	Not started	Completed	July 2023
<b>Fiscal Optimization</b>			
Maintain a Structurally Balanced Budget	Current	Target	Deadline
➤ <i>Office of the Medical Examiner</i> Work with Auditor-Controller's Office (ACO) to recommend revisions to OME fees to help offset County annual General Fund expenditures and realize full cost reimbursement.	Removal fee \$352 Body storage fee \$45 Report fee \$25 Autopsy fee \$1,676 Death investigation fee \$813	New rates determined by ACO audit/review	July 2024
➤ <i>Public Health Services</i> PHS will have a formalized methodology to determine funding priorities that align with the Department's Strategic Plan, national Public Health Accreditation standards, the Countywide Community Health Improvement Plan, and initiatives under the California Department of Public Health.	Not started	Completed	July 2023
➤ <i>Public Guardian/Conservator</i> Will develop protocols to compliantly access Mental Health Services Act funding and increase Medi-Cal billable services to reduce reliance on Realignment funding.	Not started	Completed	June 2025
Effectively Manage One-Time Funds	Current	Target	Deadline
➤ <i>Public Health Services</i> PHS will have implemented a Health Equity Plan, as required under its California Equity Recovery Initiative grant with California Department of Public Health, to include specific objectives to prioritize the allocation of resources to address conditions affecting equitable health outcomes.	Not started	Completed	July 2023

# Summary

## All Health Care Services Budgets

➤ <i>Neighborhood Preservation</i> Develop a tentative project list for HOME-American Rescue Plan funding and allocate 100% of funding available to increase/improve unsheltered bed capacity and permanent supportive housing.	0% Allocated	100% Allocated	July 2023
<b>Public Safety/Criminal Justice/Quality of Life</b>			
Reduction in Response Times for Emergency Services	Current	Target	Deadline
➤ <i>Emergency Medical Services</i> Ambulance Patient Offload Times (APOT) data is a 90th percentile measurement of the overall time in minutes from time an ambulance arrives at a hospital emergency department until the transfer of patient care to the receiving hospital's emergency department medical personnel. The standard is within twenty minutes.	Combined hospital APOT performance in 2021 = 55.6%	50.0%	December 2023
<b>Homelessness</b>			
Expand Unsheltered Bed Capacity	Current	Target	Deadline
➤ <i>Health Care Services</i> Continue to partner with St. Mary's Dining Hall and other community stakeholders to develop and bring online a minimum of 250 new non-congregate shelter beds in Stockton.	0 Beds	At least 250 beds	December 2023
Increase Permanent Supportive Housing	Current	Target	Deadline
➤ <i>Neighborhood Preservation</i> Continue to partner with the Housing Authority and break ground on the Park Center housing project for BHS consumers and 51 units of new permanent supportive housing.	In progress	Broken ground for 51 units	December 2023
➤ <i>Neighborhood Preservation</i> Continue to partner with Housing Authority and break ground on Victory Gardens phase II (potentially to be renamed) and a minimum of 49 units of new permanent supportive housing in French Camp that will prove out module construction technology and be the first of the County's HomeKey funding.	In progress	Broken ground for 49 units	December 2023
Promote Expansion of Behavioral Health Clinicians and Services	Current	Target	Deadline
➤ <i>Behavioral Health Services</i> Expansion of staffed BHS Mobile Crisis Support Teams throughout the County via Crisis Care Mobile Units grant to increase rapid response to urgent mental health situations. Establish a team at both the Tracy and Lodi BHS clinic locations.	4 Units currently located out of Stockton and French Camp	7 Units located out of Stockton, French Camp, Tracy, and Lodi	June 2025

# Summary

## All Health Care Services Budgets

➤ <i>Behavioral Health Services</i>				
Implement the CalMHSA Regional Workforce Education and Training (WET) program for Loan Forgiveness, Tuition, and Retention Stipends.	Not started	Implemented	July 2023	
➤ <i>Health Care Services</i>				
Complete contracting and begin providing student proctorships, supervised clinical hours, tuition reimbursement, and other educational supports for BHS and Community-Based Organization providers.	In progress	Completed	July 2023	

### Health Care Services - Summary of Net County Cost (2023-2024 Proposed Budget)

Budget	Name	Required Match/ MOE*	Overmatch/ Discretionary	Total Net County Cost	Total Budget (Expenditures)	NCC% of Total Budget
2022621000	Correctional Health Services	\$0	\$16,918,070	\$16,918,070	\$22,375,147	75.6%
4040300000	Mental Health Pharmacy	0	0	0	14,458,052	0.0%
4040500000	Mental Health Services	1,063,736	547,023	1,610,759	279,170,439	0.6%
4040600000	Substance Use Disorder Services	0	776,288	776,288	36,357,348	2.1%
4040700000	Behavioral Health Administration	0	0	0	23,172,847	0.0%
4041000000	Public Health Services	331,881	15,158,942	15,490,823	55,094,401	28.1%
4041200000	Public Guardian/Conservator	0	928,073	928,073	4,779,584	19.4%
4041800000	Emergency Medical Services	0	1,877,995	1,877,995	4,175,333	45.0%
4045415000	California Children's Services	545,334	1,661,294	2,206,628	7,862,364	28.1%
4049500000	HCS Administration	0	0	0	6,655,939	0.0%
4049600000	Whole Person Care Program	0	0	0	2,732,954	0.0%
4049700000	Office of the Medical Examiner	0	5,834,839	5,834,839	6,274,839	93.0%
5055246000	Neighborhood Preservation	0	0	0	18,320,119	0.0%
5055600000	Veterans Services Office	0	923,842	923,842	1,393,842	66.3%
<b>Total</b>		<b>\$1,940,951</b>	<b>\$44,626,366</b>	<b>\$46,567,317</b>	<b>\$482,823,208</b>	<b>9.6%</b>
*MOE (Maintenance of Effort)						

# 4040300000—Mental Health Pharmacy

## Health Services

Greg Diederich, *Health Care Services Director*  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,948,868	\$2,153,860	\$2,164,515	\$2,164,515	\$10,655
Services & Supplies	10,499,225	9,791,431	12,269,245	12,269,245	2,477,814
Centrally-Budgeted Expenses	19,495	20,527	24,292	24,292	3,765
Total Expenditures	\$12,467,588	\$11,965,818	\$14,458,052	\$14,458,052	\$2,492,234
Expenditure Reimbursements	(528,563)	(680,983)	(680,983)	(680,983)	0
Total Appropriations	\$11,939,025	\$11,284,835	\$13,777,069	\$13,777,069	\$2,492,234
<b>Earned Revenues By Source</b>					
Charges For Services	\$10,267,238	\$9,175,416	\$12,074,753	\$12,074,753	\$2,899,337
Miscellaneous Revenues	3,883	2,000	3,890	3,890	1,890
Fund Balance	1,667,904	2,107,419	1,698,426	1,698,426	(408,993)
Total Revenues	\$11,939,025	\$11,284,835	\$13,777,069	\$13,777,069	\$2,492,234
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	11.0	11.0	11.0	11.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	6.0	6.0	3.8	3.8	(2.2)
<b>Total Staffing</b>	17.0	17.0	14.8	14.8	(2.2)

## Purpose

The Welfare and Institutions Code mandates and regulates the existence of community mental health services. The purpose of the Mental Health Pharmacy (MHP) is to provide psychotropic medication for Mental Health Services' (MHS) consumers in an efficient manner in an attempt to increase medication compliance resulting in overall cost avoidance to MHS budgets.

MHS consumers are not mandated to have MHP fill prescriptions. Since the implementation of the Affordable Care Act in 2014, many MHS consumers continue to transition their prescriptions to commercial full-service retail pharmacies in the community.

## Major Budget Changes

### Salaries & Employee Benefits

- \$176,165 Salary and benefits adjustments.
- (\$165,510) Decrease in extra-help.

### Services & Supplies

- \$2,488,669 Increase in drug costs due to pricing.

## Centrally-Budgeted Expenses

- \$2,059 Increase in casualty insurance.

### Revenues

- \$2,500,000 Increase in Medi-Cal revenue due to improved revenue cycle practices.
- \$500,000 Increase in Medicare payments.
- (\$408,993) Decrease in use of fund balance.
- (\$100,000) Decrease in Health Plan of San Joaquin payments.

# 4040300000—Mental Health Pharmacy

## Health Services

### Program Discussion

The 2023-2024 recommended budget for the Mental Health Pharmacy (MHP) totals \$14,458,052, which is an increase of \$2,492,234 from the 2022-2023 adjusted budget.

Long-acting, injectable medications are part of the Mental Health treatment regimen typically resulting in higher rates of patient medication compliance, leading to improved clinical outcomes such as reduced hospitalization and readmission rates. However, the acquisition cost of many long-acting, injectable medications continues to increase, with price growth forecasted to again increase significantly in 2023-2024. This increased cost is projected to outpace any decreases in spending for other types of medication.

Operating an internal pharmacy allows MHP to provide and monitor medication in a manner that offers convenience and promotes client stability for those who have difficulty maintaining regular compliance with their medication regimen, potentially avoiding costly high-acuity services such as an inpatient admission, where there is a scarcity of appropriate mental health treatment beds. MHP continues to face challenges due to the increasing cost of medications and declining volume of prescriptions filled as consumers exercise their choice of utilizing other commercial pharmacy providers.

The State’s transition of Medi-Cal pharmacy benefits from managed care to Fee-For-Service (FFS) has standardized the benefits under a single delivery system and applied Statewide utilization management protocols to all outpatient drugs, including a medication formulary. Consumer access to pharmacy services has increased as the Medi-Cal pharmacy network now includes nearly all retail pharmacies in the State and is generally more expansive than the previous Medi-Cal Managed Care Plan (MCP) pharmacy networks. However, the transition to FFS Medi-Cal will limit total reimbursement to a prescription filling fee and the average acquisition cost of the medication.

As part of its SMART goals, MHP plans to implement operational changes to reduce reliance on Realignment funding. To that end, the department is reducing its part-time Pharmacy positions and enhancing billing review practices and reconciliation efforts.

The 2023-2024 recommended MHP budget includes the use of \$1.7 million in Mental Health Services Fund balance to offset the annual operating deficit, a decrease of \$408,993 from the 2022-2023 adjusted budget. MHP will continue to review all aspects of pharmacy operations in an effort to improve customer service levels, maximize third-party reimbursement, reduce operational costs, and maintain fiscal sustainability.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Prescriptions	62,678	60,133	58,934	59,000	59,000

# 4040500000—Mental Health Services

## Health Services

Greg Diederich, Health Care Services Director  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$57,343,114	\$82,006,630	\$93,543,091	\$93,543,091	\$11,536,461
Services & Supplies	68,825,463	142,147,518	169,575,242	169,575,242	27,427,724
Centrally-Budgeted Expenses	1,873,381	2,429,521	2,762,990	2,762,990	333,469
Other Charges & Uses	8,025,739	9,393,447	4,387,321	4,387,321	(5,006,126)
Capital Expenditures	251,401	984,500	2,546,795	2,546,795	1,562,295
Operating Transfers Out	0	12,900,000	6,355,000	6,355,000	(6,545,000)
Total Expenditures	\$136,319,098	\$249,861,616	\$279,170,439	\$279,170,439	\$29,308,823
Expenditure Reimbursements	(5,163,729)	(4,786,510)	(5,657,043)	(5,657,043)	(870,533)
Total Appropriations	\$131,155,369	\$245,075,106	\$273,513,396	\$273,513,396	\$28,438,290
<b>Earned Revenues By Source</b>					
Interest/Rents	\$125,497	\$500,000	\$500,000	\$500,000	\$0
Aid From Other Governments	78,604,754	51,452,833	51,461,933	51,461,933	9,100
Charges For Services	61,770,351	72,055,992	85,710,297	85,710,297	13,654,305
Miscellaneous Revenues	31,416	43,099	45,399	45,399	2,300
Operating Transfers In	4,176,594	113,513,725	134,980,353	134,980,353	21,466,628
Fund Balance	(13,553,243)	7,509,457	815,414	815,414	(6,694,043)
Total Revenues	\$131,155,369	\$245,075,106	\$273,513,396	\$273,513,396	\$28,438,290
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	509.0	547.0	588.0	588.0	41.0
<b>Temporary (Full-Time Equivalent)</b>	100.7	88.6	84.9	84.9	(3.7)
<b>Total Staffing</b>	609.7	635.6	672.9	672.9	37.3

- Operating Transfers In includes a General Fund Contribution of \$1,610,759, representing the minimum Maintenance of Effort required of \$1,063,736 and a Discretionary Contribution of \$547,023.

## Purpose

This narrative was previously combined with Behavioral Health Administration (#4040700000). Mental Health Services (MHS) provides programs to all age groups, including but not limited to, inpatient and outpatient services and 24-hour emergency crisis intervention. Clinics are located in Lodi, Manteca, Stockton, and Tracy, but MHS services are provided throughout the County by both County staff and contractors. Major sources of funding include Medi-Cal reimbursement, Mental Health Services Act (MHSA) funds, and State Mental Health Realignment revenues.



# 4040500000—Mental Health Services

## Health Services

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$7,715,678 Salary and benefits adjustments.
- \$4,471,691 Add 39 new positions.
- \$199,356 Transfer two Mental Health Specialists I-II from Substance Use Disorder Services (#4040600000).
- (\$850,264) Decrease in extra-help.

#### Services & Supplies

- \$17,760,378 Increase in collective contract costs for Community Based Organizations based on multiyear agreements and project needs.
- \$3,266,214 Transfer inpatient hospital costs from Other Charges.
- \$2,457,000 Increase in locum tenens service providers.
- \$2,396,257 Increase in Behavioral Health Administration indirect costs.
- \$741,316 Increase in supportive housing contract costs.
- \$534,996 Increasing in staffing costs supplied by HCS departments.
- \$416,831 Establish year two budget for the Mental Health Workforce Pipeline project.
- \$188,717 Increase in ambulance provider contract costs.
- \$163,812 Increase in training costs.
- \$133,373 Increase in rent expense to provide options for new administration building lease.
- \$120,000 Increase in medical support for clients in inpatient hospitals.
- (\$499,267) Decrease in costs for Electronic Health Record project.
- (\$213,000) Eliminate payments to City of Tracy due to completed grant award.
- (\$164,916) Decrease in software costs moved to Behavioral Health Administration.

### Centrally-Budgeted Expenses

- \$234,255 Increase in Workers' Compensation and Casualty insurance costs.
- \$71,509 Increase in data processing charges.

### Other Charges

- (\$3,266,214) Transfer inpatient hospital costs to Services and Supplies.
- (\$1,739,912) Eliminate Community Medical Centers assessment and respite center costs due to end of contract.

### Capital Expenditures - Equipment

- \$207,214 Transit vans (4).
- \$200,000 Vans (4).
- \$160,000 Sedans (4).
- \$96,000 Server hardware.
- \$64,631 Transit vans uplift (4).
- \$60,000 Vehicles (2).
- \$40,000 Electronic whiteboards (2).
- \$40,000 HVAC repairs.
- \$30,000 Heat pump replacement.
- \$20,000 Water heater.

### Capital Expenditures - Structures & Improvements

- \$632,700 Modular furniture.
- \$184,000 Carpet.
- \$170,000 Flooring (3).
- \$135,000 Office reconfiguration.
- \$100,000 Conference room reconfiguration.
- \$60,000 Interior paint.
- \$60,000 Facility concrete.
- \$60,000 Exterior lighting.
- \$60,000 Fencing.
- \$50,000 Psychiatric Health Facility (PHF) office space redesign.

# 4040500000—Mental Health Services

## Health Services

- \$45,000 Rolling gate.
- \$30,000 PHF patio redesign.
- \$22,250 PHF front office redesign.
- \$20,000 PHF kitchen redesign.

### Operating Transfers Out

- (\$6,545,000) Decrease in transfer to Public Improvement budget (#1040148000) for adult residential treatment modular campus.

### Expenditure Reimbursements

- \$870,533 Increase in reimbursement from Health Care Services departments.

### Revenues

- \$11,713,500 Increase in Medi-Cal revenue.
- \$4,279,437 Increase in State Realignment revenues.
- \$1,000,000 Increase in Medi-Cal administrator revenue.
- \$817,955 Increase in Early Periodic Screening Diagnosis and Treatment Medi-Cal revenue.
- \$617,800 Increase in State match for Affordable Care Act services.
- (\$6,694,043) Decrease in use of fund balance.
- (\$4,493,234) Decrease in California Health Facilities Financing Authority grant revenue.
- (\$213,000) Eliminate pass through revenue for completed grant.
- (\$190,167) Decrease in revenue for Mobile Crisis Services grant.

### Operating Transfers In

- \$20,916,341 Increase in transfers from MHSA funds.
- \$258,787 Increase in transfer from ARPA for Mental Health Workforce Pipeline project.

## Program Discussion

The 2023-2024 recommended budget for Mental Health Services (MHS) totals \$279,170,439, which is an increase of \$29,308,823 from the 2022-2023 adjusted budget.

The recommended budget adds 39 new full-time positions as follows:

Position	# Added
Administrative Assistant II	1
Chief Mental Health Clinician	5
Management Analyst I-II	6
Mental Health Clinician III	1
Mental Health Interpreter II	1
Mental Health Outreach Worker	4
Mental Health Specialist III	4
Office Assistant Specialist	1
Office Supervisor	1
Psychiatric Rehab Therapy Assistant	1
Senior Office Assistant	3
Senior Psychiatric Technician	11
<b>Total</b>	<b>39</b>

## Network Adequacy of Mental Health Plan

Behavioral Health Services (BHS) is designated as a prepaid Mental Health Plan (MHP) for Mental Health Medi-Cal Services and is required by the Federal Centers for Medicaid and Medicare to demonstrate an adequate network of medical and clinical providers. In January 2019, BHS was notified the number of network providers reported to the State in 2018 was insufficient to meet these requirements. In an effort to comply with State requirements, BHS developed contracts with several temporary staffing companies for locum tenens physicians and other qualified mental health professionals. Funding for these contracts remains in the proposed budget in order to ensure compliance with network adequacy. For the longer term, BHS continues to explore options to become a more competitive employer within the region to develop and maintain sufficient internal and external provider capacity.

The Department recently worked with Human Resources and the Board approved increased wages for key clinician classification positions to help increase network adequacy (B-22-111). Many BHS positions have also been added to the difficult to recruit classifications list maintained by

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Human Resources which permits various recruitment and retention bonuses for new hires (B-22-488).

On June 21, 2022, the Board approved an allocation of \$5,200,000 from the County's American Rescue Plan Act (ARPA) fund for the Mental Health Workforce Pipeline Project (B-22-361) to improve recruitment and retention for both BHS and other providers of mental health services, with an emphasis on those serving the Medi-Cal population. Specifically, ARPA funding will be used to offer incentives and benefits to students and current employees pursuing mental health degrees to increase recruitment and retention of mental health professionals within the county. A contract with HealthForce Partners to implement the project was approved by the Board on January 24, 2023 (B-23-36). Additionally, BHS is leveraging MHSA Workforce Education and Training funds to provide recruitment, retention, and educational stipends to eligible BHS staff (B-22-491).

Many of the proposed new positions are directly related to initiating new programs and expanding existing programs to fulfill network adequacy requirements. The demand for mental health services continues to grow as does the need for development of internal capacity to provide these services. Unfortunately, impacts from the COVID-19 pandemic have only increased the already significant number of vacancies and the Department still has a number of critical unfilled positions. Despite the current vacancy rate, the Department is moving forward with adding positions necessary to implement new projects and expand existing programs to meet community needs. BHS is also working with the California Behavioral Health Directors Association to advocate for revisions to the formula used to set network adequacy requirements. Ongoing discussions with State and Federal agencies and the implementation of outside monitoring of BHS activities has improved the outlook for compliance.

### Mental Health Services Act (MHSA)

MHSA continues to be a major funding source for MHS with expenses of \$128.2 million programed for use in the 2023-2024 recommended budget. This is expected to result in a compliant and planned reduction of the fund balance, as MHSA revenue is projected at \$84.0 million in 2023-2024. The overall purpose of MHSA is to reduce long-term adverse impacts on individuals, families, and State and local budgets as a result of untreated, serious mental illness. MHSA funding is used for a wide variety of prevention, intervention, and treatment programs for mental health concerns.

BHS carefully scrutinizes the use of MHSA funds and evaluates the outcomes of MHSA-funded projects. In the past several years, BHS has made a concerted effort to substantially increase the number of MHSA-funded projects

while paying careful attention to strict State regulations governing the use of MHSA funds. An annual community-wide planning process is conducted to determine community needs and priorities and only projects in an approved MHSA plan can be funded.

MHSA funding is allocated within five component areas:

1. Prevention and Early Intervention (PEI)
2. Community Services and Supports (CSS)
3. Innovation (INN)
4. Workforce Education and Training (WET)
5. Capital Facilities/Technological Needs (CFTN)

Several PEI projects are in various stages of implementation including diversion of non-violent, non-serious offenders from the criminal justice system, community education to reduce suicide risks, stigma reduction, trauma counseling services, prevention and early intervention services for older adults and children and youth aged 0-5, outreach and engagement cultural brokers program, forensic prevention and engagement program, expansion of skill building for parents and guardians, and mentoring programs.

In 2022-2023, MHSA CSS funding was used to implement and expand Intensive Full-Service Partnerships (FSP) focused on very high-risk, mental health consumers including an expansion of Mobile Crisis Response Teams to enhance response to north and south County and provide on-site clinical assessment and interventions in partnership with first responders, hospital emergency rooms, children's group homes, and Mary Graham Children's Shelter. In 2023-2024, CSS projects will include: 1) the expansion of FSP Services to the Whole Person Care population, 2) Field Based Cultural Case Management Services, 3) expansion of Transitional Aged Youth (TAY) FSP services, and 4) a Dual Diagnosis (co-occurring) Treatment Program.

In 2023-2024, MHSA CSS will invest significant funds for future planned Project-Based Housing to enhance the housing continuum for consumers, expand funding for peer-run wellness centers in north and south County, and enhance funding for additional FSPs in the Lodi, Manteca, and Tracy areas. As allowed by MHSA guidelines, BHS will transfer funding from the CSS component to fund the WET and CFTN components.

### Crisis and Inpatient Services

The current BHS Psychiatric Health Facility (PHF) is licensed for 16 beds. BHS continues to seek additional intensive rehabilitative services as acute care services remain impacted and out of County placements in inpatient hospitals grow. In 2017, Telecare, Inc., was awarded the contract to build an additional PHF, however, the project was placed on

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hold due to limited capital funds and staffing capacity as a result of the COVID-19 pandemic. In 2022-2023, BHS resurrected the project and began working collaboratively with Telecare Inc., to submit an application requesting nearly \$12 million dollars from the Behavioral Health Continuum Infrastructure Program (BHCIP) to retrofit a building on the San Joaquin County General Hospital grounds. In addition, the department was recently awarded \$9 million in State earmark funding toward the renovation of an existing County owned building as a PHF.

### Regional Electronic Health Record (EHR)

On October 4, 2022 the Board approved a participation agreement with the California Mental Health Services Authority for the Semi-Statewide Enterprise Health Record Project (B-22-551). The collective interest in a new statewide EHR system stems from an increasingly complex environment in which county Behavioral Health Plans operate in California. The new system is expected to address Medi-Cal requirements for documentation and payment reform. The 2023-2024 budget includes \$1.2 million for year-two software costs. A go live date is expected in July 2023 with full implementation in 2027.

### Services for Homeless Individuals

Progressive Housing, previously funded with \$6.4 million of MHSA INN funding, has shifted to MHSA CSS funding as of January 2023. Progressive Housing is a low-barrier, housing first program designed to rapidly provide housing to consumers and individuals suspected of suffering from Serious Mental Illness (SMI) or co-occurring disorders. The program will continue to provide 18 scattered-site homes in 2023-2024 with a total capacity of 87 beds.

BHS also provides a substantial number of homeless outreach and engagement services for homeless, mentally ill individuals. The Projects for Assistance in Transition from Homelessness (PATH) team provides various services at encampments and shelters. BHS also partners with the Stockton Police Department on the Law Enforcement Assisted Diversion project, in which teams of officers and BHS staff link homeless individuals to safe housing, and mental health and substance use disorder services. The Friendly Faces program was implemented with the Tracy Police Department through grant funds acquired in 2022-2023. This program will continue in 2023-2024. The Department anticipates expanding this type of service delivery to other local law enforcement agencies.

BHS operates a Whole Person Care-funded team linking homeless individuals to local services. In 2023-2024 the Department plans to partner with Public Health Services to provide new levels of service to individuals living on the street with complex mental health and substance use needs

and to those who struggle with overutilization of emergency room visits. It is anticipated the implementation of these additional “street services” will reduce incarceration and improve interagency data sharing regarding the County’s most vulnerable populations.

### No Place Like Home (NPLH)

NPLH was approved by voters via a November 2018 ballot initiative and authorized the use of MHSA funds for the development of permanent supportive housing for individuals with SMI who are homeless, chronically homeless, or at-risk of chronic homelessness. The County was awarded a non-competitive allocation of \$2,141,364 in January 2019 (R-19-12) to apply toward a housing development project. BHS developed a plan to address homelessness for people with SMI, issued a Request for Qualifications for a development partner, and through that process selected Housing Authority of the County of San Joaquin (HACSJ). The \$2.1 million non-competitive NPLH allocation was applied toward the development of the 37-unit Sonora Square Apartment project. In January 2020, BHS and HACSJ submitted a competitive NPLH proposal for the site, to renovate and construct the project. Regrettably, the application fell short of the funding threshold.

In order to mitigate this setback and become more competitive in subsequent NPLH funding rounds, in November 2020 BHS allocated \$1,130,000 of internal MHSA funds (B-20-652) to enable HACSJ to acquire Sonora Square’s underlying parcel and perform additional pre-development work. A second competitive application was submitted in January 2021, and while the project score met the previous round’s threshold, it was not high enough to compete against other NPLH applicants in the large county allocation.

Given the commitment of BHS and the HACSJ to complete Sonora Square, and in order to eventually secure \$9,249,000 in Low-Income Housing Tax Credits awarded to HACSJ in September 2021 (receiving the highest score in the Central Valley Region), BHS committed an additional \$2,043,286 in local MHSA funds in October 2021 (B-21-615). In June 2021, HACSJ received a Community Development Block Grant funding award from the City of Stockton, in the amount of \$456,714. Finally, as development costs had significantly increased since the initial 2019 estimate, BHS contributed an additional \$1,426,107 in local MHSA funds in February 2022 (B-22-79) to complete the funding package. The groundbreaking for Sonora Square took place in June of 2022, and HACSJ anticipates that Sonora Square will be operational in late summer of 2023. This will bring the total number of project-based housing units available to 74.

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Sonora Street Square		
Funding Source	Allocation Date	Amount
NPLH Noncompetitive Round 1	July 2019	\$2,141,364
Mental Health Services Act	July 2020 - June 2022	3,173,286
Community Development Block Grant	June 2021	456,714
Low-Income Housing Tax Credits	September 2021	9,249,000
MHSA - Construction Bid Overage	February 2022	1,426,107
Total		\$16,446,471

In January 2022, BHS and the HACSJ submitted a proposal for the fourth and final round of competitive NPLH funding for the Park Center housing development, which will provide 50 units of permanent supportive housing for BHS consumers. In order to achieve a higher score on the NPLH application, \$1.8 million in local MHSA funding was transferred to HACSJ to secure the purchase of the property (B-21-746). These actions did substantially increase the application's score to 190.87 out of a possible 200 points, however, all projects in this final round had scores in excess of 198 points.

In July 2022 HACSJ applied for Multifamily Housing Program funding with the California Department of Housing and Community Development and achieved 105 out of a possible 113 points, but was not awarded funding. HACSJ plans to apply for low-income tax credits in mid-2023, and if awarded, BHS will supplement with substantially more local MHSA funding for this approximately \$31 million permanent supportive housing project.

As part of its SMART goals, Health Care Services Agency is partnering with HACSJ to break ground on the Park Center project by December 2023. HACSJ is expected to apply for the final Low-Income Housing Tax Credits for the project mid-2023.

### California Advancing and Innovating Medi-Cal (CalAIM)

In 2019-2020, the State of California Department of Health Care Services began implementing a multi-year, multi-phase restructuring of Medi-Cal. CalAIM contains 13 elements directly impacting BHS. Changes include: payment reform (billing restructure), upgrade of electronic health records, revised medical necessity documentation standards, redefinition of the Department's role in providing services to at risk populations (including the jail population, older adults

and foster youth), data exchanges, service integrity requirements, and added data and outcome measurement expectations. BHS will continue to work closely with the State and local partners to enhance infrastructure and service delivery models and ensure that San Joaquin Medi-Cal consumers can trust BHS to be a premier mental health care provider.

HCS adopted a SMART goal of expanding Mobile Crisis Support Teams to serve expanded areas throughout the County and provide increased rapid response to urgent mental health situations. To date, BHS has added one Crisis Support Team, which will be stationed in Lodi by the end of May 2023. BHS has also expanded mobile crisis support services to Tracy and anticipates locating a team there when the designated facility space is completed in summer 2023. As teams continue to be added, the hours of mobile crisis services will also be expanded to include more after-hours availability.

## Fund Balances

### Dorothy Chase Estate Mental Health Fund

The Dorothy Chase Estate Mental Health Trust Fund (#81261) is dedicated to the development and funding of mental health services, especially those benefiting senior citizens in the County. Fund balance as of March 31, 2023, was \$41,253. The 2023-2024 recommended budget includes no transfers from this fund.

### Construction Capital Outlay Fund

The Health Construction Capital Outlay Fund (#37400) was previously used to collect funds designated for construction of a new Public Health facility. The fund was fully exhausted during 2022-2023 after its completion. In March 2023, Health Care Services received proceeds of \$9 million from the State General Fund via Assembly Bill 179 for the renovation of a county-owned building to serve as an additional 16-bed inpatient psychiatric health facility. These funds will be held in trust as BHS approaches the Board for acceptance of the award and develops an expenditure plan. Fund balance as of March 31, 2023 was \$9,000,000. The 2023-2024 budget includes no transfers from this fund.

### Mental Health Special Revenue Fund

The Mental Health Special Revenue Fund (#20007) is the operating fund for Mental Health Pharmacy, Mental Health Services, Behavioral Health Administration, and Public Guardian/Conservator. Fund balance as of March 31, 2023 was \$59,297,381. The 2023-2024 budget includes \$815,414 in fund balance for use in the Mental Health Services budget, \$1,698,426 for use in the Mental Health Pharmacy budget,

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and \$2,976,511 for use in the Public Guardian/Conservator budget.

### Mental Health Services Act Funds

MHSA funds are generated through a 1% personal State income tax for taxable earnings exceeding \$1.0 million. Revenues generated are used to provide funding for mental health services and programs. Funds must be appropriated within three years of receipt or be subject to reversion to the State. Funds can only be used in accordance with the MHSA legislation and as part of an approved local MHSA program and expenditure plan, which is subject to stakeholder input.

As of March 31, 2023, MHSA Special Revenue Fund balances and budgeted use for 2023-2024 are:

MHSA Fund	March 31, 2023 Balance	2023-2024 Budgeted Use
<b>20606</b>		
Prudent Reserve	\$6,939,866	\$0
<b>20610</b>		
Community Services & Supports	74,455,218	93,193,749
<b>20611</b>		
Prevention & Early Intervention	29,280,815	19,064,280
<b>20612</b>		
Innovation	7,642,952	1,544,480
<b>20613</b>		
Capital Facility & Technology Needs	17,454,345	13,576,636
<b>20614</b>		
Workforce Education & Training	1,037,722	841,504
<b>Total</b>	<b>\$136,810,918</b>	<b>\$128,220,649</b>

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Adult Services (Days)</b>					
Psychiatric Health Facility	5,794	9,410	5,673	5,828	5,900
State Hospital	1,095	1,095	1,095	1,095	1,095
Crisis Residential	11,101	11,366	10,896	9,158	10,500
Adult Transitional	5,249	5,329	5,370	5,412	5,560
<b>Day Treatment (Days)</b>					
UOP Socialization	9,020	10,874	19,410	23,856	24,000
Crisis Stabilization	41,577	38,976	32,082	28,406	41,750
<b>Outpatient (Hours)</b>					
Adult Outpatient/Crisis	55,942	36,368	38,298	32,972	38,500
Crisis	2,574	1,598	1,557	1,026	1,600
Children's Services	53,874	51,076	57,592	65,824	67,500
Older Adults	5,315	4,452	8,558	7,624	7,700
Children's Placements	3,589	4,938	2,780	3,616	3,700
<b>MHSA Services (Hours)</b>					
Adult Outpatient	46,291	48,715	62,638	58,418	65,000
Crisis	23,582	25,820	20,596	26,820	27,000
Children's Services	23,054	46,554	46,440	50,678	51,000
Older Adults	3,066	1,571	6,213	7,618	7,700
System-wide Cost Per Consumer	\$7,158	\$8,087	\$8,589	\$11,670	\$11,670

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Greg Diederich, Health Care Services Director  
[www.sjgov.org/department/hcs](http://www.sjgov.org/department/hcs)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$5,937,596	\$9,342,518	\$10,159,893	\$10,159,893	\$817,375
Services & Supplies	14,561,532	18,723,770	25,232,758	25,232,758	6,508,988
Centrally-Budgeted Expenses	394,967	483,574	571,737	571,737	88,163
Capital Expenditures	0	155,960	392,960	392,960	237,000
Total Expenditures	\$20,894,095	\$28,705,822	\$36,357,348	\$36,357,348	\$7,651,526
Expenditure Reimbursements	(457,686)	(329,434)	(449,063)	(449,063)	(119,629)
Total Appropriations	\$20,436,409	\$28,376,388	\$35,908,285	\$35,908,285	\$7,531,897
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$20,202,425	\$16,174,707	\$22,417,908	\$22,417,908	\$6,243,201
Charges For Services	11,813,279	11,068,393	12,365,311	12,365,311	1,296,918
Operating Transfers In	776,288	1,133,288	1,125,066	1,125,066	(8,222)
Fund Balance	(12,355,583)	0	0	0	0
Total Revenues	\$20,436,409	\$28,376,388	\$35,908,285	\$35,908,285	\$7,531,897
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	91.0	88.0	89.0	89.0	1.0
<b>Temporary (Full-Time Equivalent)</b>	21.0	21.0	21.0	21.0	0.0
<b>Total Staffing</b>	112.0	109.0	110.0	110.0	1.0

- Operating Transfers In includes a General Fund Contribution of \$776,288 for 2023-2024.

## Purpose

The Substance Use Disorder Services (SUDS) budget, formally known as Substance Abuse Services (SAS), provides a range of drug and alcohol prevention and treatment services for County residents including outpatient, intensive outpatient, residential, and narcotic treatment services. SUDS plays a significant role in the community's effort to reduce the harmful effects of alcohol and drug addiction.

In partnership with its health care and criminal justice system partners, SUDS uses a variety of funding streams to reduce the number of individuals requiring the use of high-cost jail beds and medical and psychiatric emergency services, as a result of untreated substance use disorders.

## Major Budget Changes

➤ (\$199,536) Transfer two Mental Health Specialists I-II to Mental Health Services (#4040500000).

### Salaries & Employee Benefits

- \$723,425 Salary and benefits adjustments.
- \$220,518 Add two Senior Psychiatric Technicians.
- \$72,968 Add a Food Service Worker I-III.

### Services & Supplies

- \$5,305,805 Increase in Drug Medi-Cal provider costs due to licensure requirements.
- \$395,769 Increase in grant-funded payments to Office of Education.



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- \$203,755 Increase in Behavioral Health Administration indirect costs.
- \$193,940 Increase in drug court costs.
- \$125,000 Increase in security services.
- \$70,000 Increase in food costs.
- \$43,700 Increase in furniture purchases based on new staff and restructure of existing configuration.
- \$35,215 Increase in Railroad Square rent.
- \$28,500 Increase in computer supply purchases.
- \$24,300 Increase in utilities.
- \$16,575 Increase in vehicle operating expense.

### Centrally-Budgeted Expenses

- \$70,234 Increase in Workers' Compensation and Casualty insurance costs.
- \$12,013 Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$75,000 Stove and hood.
- \$60,000 Vehicles (2).
- \$38,500 Refrigerators/freezers (5).
- \$5,000 Shed.

### Capital Expenditures - Structures & Improvements

- \$60,000 Playground sidewalk project.
- \$60,000 Recreational facility concrete.
- \$60,000 Residential program lobby remodel.
- \$34,460 Office and treatment room painting.

### Expenditure Reimbursements

- \$105,308 Increase in reimbursement from Mental Health Services for shared staffing.
- \$14,321 Increase in reimbursement from District Attorney for Project Navigate Constructive Change.

### Revenues

- \$4,674,165 Increase in 2011 Realignment funding.
- \$771,918 Increase in Medi-Cal revenue.
- \$665,521 Increase in State funding for Affordable Care Act clients.
- \$520,000 Increase in Drug Medi-Cal revenue.
- \$514,557 Increase in Mental Health Services Oversight & Accountability Commission revenue.
- \$401,397 Establish budget for MHSA-funded Dual Diagnosis program revenue.
- \$46,534 Increase in Proposition 172 revenue.
- (\$58,973) Decrease in Substance Abuse Block Grant revenue.

## Program Discussion

The 2023-2024 recommended budget for Substance Use Disorder Services totals \$36,357,348, which is an increase of \$7,651,526 from the 2022-2023 adjusted budget.

Through realignment legislation in 1991 and 2011, funding for the majority of the non-Federal share of costs associated with Specialty Mental Health Services (SMHS) and Substance Use Disorder Services (SUDS) became the responsibility of the counties. Currently, counties are reimbursed for these programs via Medicaid Certified Public Expenditure (CPE) methodologies. Under the CPE structure, reimbursement to counties is limited to cost incurred by the counties and is subject to a lengthy and labor-intensive cost reconciliation process. The California Advancing and Innovating Medi-Cal (CalAIM) Behavioral Health Payment Reform initiative seeks to move counties away from cost-based reimbursement to enable value-based reimbursement structures rewarding better care and quality of life for Medi-Cal beneficiaries. Payment reform will transition counties from cost-based reimbursement funded via CPEs to fee-for-service reimbursement funded via Intergovernmental Transfers (IGTs), eliminating the need for reconciliation to actual costs.

### Narcotic Treatment Programs (NTP)

As a result of 2011 State Realignment, counties are responsible for using realigned State sales tax revenue as a match for Federal Drug Medi-Cal (DMC) reimbursements to treatment providers. Most DMC contracts are for NTP, the costliest of DMC services. In the County, two NTP providers



# **4040600000—Substance Use Disorder Services**

## **Health Services**

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operate seven methadone clinics in Lodi, Manteca, and Stockton. These services are a Federal entitlement and counties have little ability to modify services to achieve cost savings. Although the individual cost of these services has increased over the past several years, Behavioral Health Services (BHS) has managed costs with careful utilization review through the Drug Medi-Cal Organized Delivery System (DMC-ODS) process. Contract amounts with both NTP providers reflect actual utilization expectations. Future changes in Realignment revenue earned through sales taxes and vehicle license fees may affect the amount of funding available for services across all BHS programs, including NTP.

### **Drug Medi-Cal Organized Delivery System (DMC-ODS)**

The State Department of Health Care Services continues to implement a Federal Section 1115 Medi-Cal “Bridge to Reform” demonstration waiver. One component of the waiver includes major changes to the DMC service delivery system, transforming it into a continuum of care modeled after the American Society of Addiction Medicine (ASAM) criteria for substance use disorder treatment services. The County’s DMC-ODS was implemented in 2018-2019 and includes a focus on timeliness of services and timely access to treatment.

This demonstration waiver was scheduled to expire on December 31, 2020, and transition away from the Section 1115 waiver authority, along with many other aspects of the Medi-Cal Program, and into the CalAIM initiative. Due to a variety of circumstances, an extension of the demonstration waiver through December 31, 2026 was granted in June 2021.

In 2022-2023, SUDS successfully expanded its contracted DMC-ODS provider network through a variety of means, including implementation of recent rate increases. These network expansion efforts will continue in 2023-2024 as the department integrates CalAIM regulations, which include additional required ASAM levels of care. SUDS is exploring options in order to begin providing a medically monitored detox service. This includes development of plans for a facility as well as contracting for service providers.

### **Residential Treatment**

SUDS operates two residential substance use disorder treatment programs, Recovery House (licensed for men and women) and the Family Ties Program (perinatal program for women and children). Funding is provided by DMC-ODS, Federal substance abuse block grants, and State funds. Referrals are received from criminal justice agencies, social service agencies, and families. Implementation of the DMC-ODS in 2018-2019 allowed DMC billing for non-perinatal residential treatment services provided at

Recovery House, which were previously limited by the Institution for Mental Disease exclusion, as the facility exceeds the sixteen-bed Federal limit.

In 2019, several providers of residential substance use disorder services programs located in San Joaquin County began their applications to the California Department of Health Care Services (DHCS) for licensure. This was an extensive process and these providers completed their requirements as of February 2023 to become DMC-ODS licensed and certified. Under Cal-AIM, these providers are now eligible to receive higher unit of service rates in accordance with Federal health care standards, further moving addiction treatment into mainstream health care. On February 7, 2023, the Board approved significantly increased contracts with these providers (B-23-57), and this potentially expanded the County’s residential treatment capacity.

### **Residential Services for Co-Occurring Substance Use and Mental Health Disorders**

Many Recovery House participants suffer from co-occurring disorders (COD) for substance use and mental health, however, the program was not designed specifically to serve these individuals. In 2023-2024, BHS will open a program designed to treat those with COD, a condition which can reduce the likelihood of successful recovery. In early 2020, BHS received funding from the California Health Facilities Financing Authority (CHFFA) for two 16-bed COD treatment facilities located adjacent to the existing Recovery House. The construction of the new program was underway for much of 2022-2023, with completion and operation of the program now expected in fall 2023. A vendor has been contracted to operate this facility.

The demonstration waiver includes dual diagnosis treatment, which is now considered a compliant use of Mental Health Services Act (MHSA) funding. The recommended budget includes \$401,397 in MHSA funding for the creation of a Dual Diagnosis program which will further enhance continuity of care. Two new Senior Psychiatric Technician positions are included in the budget to provide treatment services for residential co-occurring clients.

## **Fund Balances**

### **Substance Abuse Problem Assessment Fund**

The Substance Abuse Problem Assessment Special Revenue Fund (#20604) receives funds collected by the Court from individuals ordered to participate in a County alcohol and drug problem assessment program. Fund balance as of March 31, 2023, was \$44,409. The 2023-2024 recommended budget includes \$41,281 in transfers from this fund.

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### Alcohol/Drug Abuse Education Funds

The Alcohol Abuse Education Special Revenue Fund (#20605) and Drug Abuse Education Special Revenue Fund (#20607) support the County's alcohol and drug abuse education and prevention efforts. Fund balances as of March 31, 2023, were \$647,796 and \$239,944, respectively. The 2023-2024 recommended budget includes no transfers from these funds.

### Statham Drunk Driving Fund

The Statham Drunk Driving Special Revenue Fund (#20609) is used for treatment of clients with alcohol dependency in certified residential programs. Fines are collected by the County from Driving while Under the Influence offenses.

Fund balance as of March 31, 2023, was \$1,585,037. The 2023-2024 recommended budget includes \$307,497 in transfers from this fund.

### Opioid Settlement Fund

The Opioid Settlement General Fund Special Account (#13412) was approved by the Board on December 13, 2022 (B-22-692) to account for the County's receipts from the State Opioid Settlement Fund and related expenditures. Fund balance as of March 31, 2023 was \$4,116,877. The 2023-2024 recommended budget includes no transfer from this fund. Appropriation and revenue adjustments in various departments will be requested mid-year once an expenditure plan is approved by the Board.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Prevention Activities</b>					
<i>Schools Contacted</i>	90	76	201	201	201
<i>Students Contacted</i>	3,000	2,440	198	943	990
<i>Organizations Contacted</i>	75	27	23	25	28
<i>Individuals Contacted</i>	2,500	1,585	409	668	700
<b>Treatment Services</b>					
<i>Recovery House-Admissions</i>	314	327	279	250	300
<i>Average Cost per Client</i>	\$6,481	\$8,508	\$10,446	\$13,084	\$15,069
<i>Recovery House-Client Days</i>	9,225	6,840	8,399	7,550	8,250
<i>Family Ties-Admissions</i>	131	107	85	95	130
<i>Average Cost per Client</i>	\$16,264	\$10,637	\$22,658	\$22,235	\$26,378
<i>Family Ties-Client Days</i>	6,627	8,807	4,280	4,310	9,500
<b>Chemical Dependency Counseling Center</b>					
<i>Intakes</i>	1,039	1,056	738	800	850
<i>Average Cost per Client</i>	\$1,754	\$2,779	\$3,105	\$3,274	\$4,092
<b>Narcotic Treatment Program</b>					
<i>Admissions</i>	2,388	2,496	1,772	2,500	2,600
<i>Average Cost per Client</i>	\$4,930	\$4,051	\$4,968	\$3,257	\$3,923

# 4040700000—Behavioral Health Administration

## Health Services

Greg Diederich, Health Care Services Director  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$9,655,336	\$11,898,794	\$14,125,981	\$14,125,981	\$2,227,187
Services & Supplies	4,175,265	6,585,894	7,624,596	7,624,596	1,038,702
Centrally-Budgeted Expenses	1,105,800	1,058,589	873,270	873,270	(185,319)
Capital Expenditures	12,294	316,000	549,000	549,000	233,000
Total Expenditures	\$14,948,695	\$19,859,277	\$23,172,847	\$23,172,847	\$3,313,570
Expenditure Reimbursements	(13,851,559)	(18,651,918)	(21,965,488)	(21,965,488)	(3,313,570)
Total Appropriations	\$1,097,136	\$1,207,359	\$1,207,359	\$1,207,359	\$0
<b>Earned Revenues By Source</b>					
Charges For Services	\$957,103	\$1,207,209	\$1,207,209	\$1,207,209	\$0
Miscellaneous Revenues	1,692	150	150	150	0
Fund Balance	138,341	0	0	0	0
Total Revenues	\$1,097,136	\$1,207,359	\$1,207,359	\$1,207,359	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	88.0	92.0	97.0	97.0	5.0
<b>Temporary (Full-Time Equivalent)</b>	12.1	12.9	15.4	15.4	2.5
<b>Total Staffing</b>	100.1	104.9	112.4	112.4	7.5

## Purpose

This narrative was previously combined with Mental Health Services (#4040500000). Behavioral Health Administration (BHA) provides administrative support for Mental Health Services (MHS), the specialty Mental Health Medi-Cal Managed Care Plan, Substance Use Disorder Services (SUDS), Mental Health Pharmacy (MHP), the Public Guardian/Conservator's Office (PG/C), and youth Psychiatric Services at the Juvenile Justice Center.

## Major Budget Changes

### Salaries & Employee Benefits

- \$999,618 Salary and benefits adjustments.
- \$222,497 Full-year cost of Deputy Director-BHS Clinical added midyear 2022-2023.
- \$168,937 Full-year cost of Management Analyst III added midyear 2022-2023.
- \$775,879 Add six new positions.

- (\$180,136) Delete a vacant Mental Health Charge Nurse.

- \$240,392 Increase in extra-help.

### Services & Supplies

- \$533,438 Increase in rent expense to provide options for new administration building lease.
- \$521,303 Increase in Health Care Services Administration allocated costs.
- \$98,219 Increase in software licensing and maintenance.

# 4040700000—Behavioral Health Administration

## Health Services

- \$64,471 Increase in utilities.
- \$40,236 Increase in network security contract costs.
- (\$178,840) Decrease in computer supplies due to completed purchases.
- (\$75,000) Decrease in legal services.

### Centrally-Budgeted Expenses

- \$180,813 Increase in Workers' Compensation and Casualty insurance costs.
- (\$251,122) Decrease in data processing charges.
- (\$159,110) Decrease in Medical Malpractice insurance costs.
- \$44,099 Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$200,000 Network hardware.
- \$199,000 UPS system.

### Capital Expenditures - Structures & Improvements

- \$60,000 Water heater.
- \$40,000 HVAC repairs.
- \$30,000 Heat pump replacement.
- \$20,000 Workspace reconfiguration (2).

### Expenditure Reimbursements

- \$3,313,570 Increase in reimbursement from Health Care Services departments.

## Program Discussion

The 2023-2024 recommended budget for Behavioral Health Administration (BHA) totals \$23,172,847, which is an increase of \$3,313,570 from the 2022-2023 adjusted budget.

The recommended budget adds a net of five full-time positions as follows:

Position	# Added/(Deleted)
Administrative Assistant Jr-I	1
Chief Mental Health Clinician	1
Management Analyst I-II	2

Position	# Added/(Deleted)
Mental Health Charge Nurse	(1)
Mental Health Specialist III	1
Senior Psychiatric Technician	1
<b>Total</b>	<b>5</b>

As part of Health Care Services Agency's (HCS) SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals, BHA intends to partner with Human Resources to identify new recruitment strategies to produce a 5% reduction in the Department's vacancy rate by December 2024. Behavioral Health Services (BHS) is working closely with Human Resources to fill a long-vacant Departmental Personnel Analyst to provide needed structure and leadership to implement streamlined systems aimed at improving the Department's hiring processes. Additionally, advertising is being expanded to include new publications, with recruitment and retention incentives highlighted.

The Proposed Budget adds four full-time positions to assist with the implementation of the Mental Health Services Act (MHSA) Three-Year Program and Expenditure Plan and the various new California Advancing and Innovating Medi-Cal (CalAIM) regulatory requirements. This State Department of Health Care Services' multi-year initiative seeks to improve the quality of life and health outcomes of Medi-Cal beneficiaries by implementing broad programmatic and payment reform systems.

BHA has identified the need for a clinically licensed individual to provide for succession planning and oversight at the senior management level and plans to explore options with Human Resources to determine appropriate senior management staffing for BHS. Position allocation changes may be requested in early 2023-2024 once relevant analyses are completed.

HCS adopted a SMART goal of implementing the California Mental Health Services Authority (CalMHSA) Regional Workforce Education and Training (WET) program for loan forgiveness, tuition reimbursement, and retention stipends in exchange for service commitments. BHS has completed this objective, engaging over 50 staff to date in the loan forgiveness program, and recently rolling out the tuition reimbursement/stipend application. These programs are designed to address the Department's staff shortage issue for the longer term and make BHS a more competitive employer within the region.

As a result of CalAIM requirements, BHS is expanding existing service access through a "no wrong door" policy. In order to accommodate the additional staffing required to launch these new initiatives and programs, the recommended budget includes \$666,811, consisting of \$533,438 in the

# **4040700000—Behavioral Health Administration**

## **Health Services**

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Behavioral Health Administration budget plus \$133,373 budgeted in Mental Health Services (#4040500000), to explore leasing options for space in additional buildings located in University Park, adjacent to the BHS campus.

### **Service Integrity**

BHA plans to create a new Service Integrity Unit in 2023-2024, tasked with implementing safeguards to identify

and prevent fraud, waste, and abuse of Medicaid dollars. This Unit will consist of an existing Management Analyst III and one new Management Analyst I-II. These individuals will analyze and interpret the impact of CalAIM regulations on the Department, and ensure appropriate conduct, service delivery, and spending of taxpayer funds.

# 4041000000—Public Health Services

## Health Services

Greg Diederich, *Health Care Services Director*  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$23,568,114	\$31,258,663	\$31,480,124	\$31,480,124	\$221,461
Services & Supplies	11,722,482	15,199,457	19,293,582	19,293,582	4,094,125
Centrally-Budgeted Expenses	1,006,145	1,275,481	2,143,195	2,143,195	867,714
Other Charges & Uses	162,465	336,483	425,000	425,000	88,517
Capital Expenditures	1,350,933	2,197,800	1,752,500	1,752,500	(445,300)
Total Expenditures	\$37,810,139	\$50,267,884	\$55,094,401	\$55,094,401	\$4,826,517
Expenditure Reimbursements	(1,669,168)	(1,984,752)	(2,004,400)	(2,004,400)	(19,648)
Total Appropriations	\$36,140,971	\$48,283,132	\$53,090,001	\$53,090,001	\$4,806,869
<b>Earned Revenues By Source</b>					
Fines/Forfeitures/Penalties	\$1,099	\$1,500	\$500	\$500	(\$1,000)
Aid From Other Governments	26,513,308	31,431,024	34,633,785	34,633,785	3,202,761
Charges For Services	2,030,799	1,700,000	1,695,000	1,695,000	(5,000)
Miscellaneous Revenues	155,680	60,000	60,000	60,000	0
Operating Transfers In	1,991,243	1,702,834	1,541,774	1,541,774	(161,060)
Total Revenues	\$30,692,129	\$34,895,358	\$37,931,059	\$37,931,059	\$3,035,701
<b>Net County Cost</b>	\$5,448,842	\$13,387,774	\$15,158,942	\$15,158,942	\$1,771,168
<b>Allocated Positions</b>	233.0	226.0	206.0	206.0	(20.0)
<b>Temporary (Full-Time Equivalent)</b>	22.9	8.2	15.1	15.1	6.9
<b>Total Staffing</b>	255.9	234.2	221.1	221.1	(13.1)

- Operating Transfers In includes a General Fund Contribution of \$331,881, representing the minimum Maintenance of Effort required.

## Purpose

Public Health Services (PHS) provides a wide variety of health programs and services to the community. Services include, but are not limited to, patient education and case management, monitoring and investigation of reportable communicable diseases, maintaining vital records, statistical analysis and mapping of disease data, regional public health laboratory services, public health emergency preparedness planning, health promotion, and chronic disease prevention activities.

## Major Budget Changes

### Salaries & Employee Benefits

- \$1,811,027 Salary and benefits adjustments.
- (\$2,000,320) Delete 20 vacant positions.
- \$410,754 Increase in extra-help.

### Services & Supplies

- \$3,335,004 Increase in grant-funded preparedness and planning expenses.
- \$1,956,104 Increase in media consulting services for public-facing messaging.
- \$139,000 Increase in software costs.

# 4041000000—Public Health Services

## Health Services

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- \$137,080 Increase in Health Care Services Administration direct IT support.
- \$125,000 Furniture for Wilson Way location.
- \$50,000 Increase in utilities due to new facility.
- \$45,000 Increase in communications expense due to new facility.
- \$39,000 Increase in janitorial services due to new facility.
- \$30,000 Increase in membership costs.
- (\$1,106,123) Eliminate one-time purchases for completed facility move.
- (\$482,465) Decrease in COVID-19 testing costs.
- (\$77,658) Decrease in travel and training costs.
- (\$65,000) Decrease in facility maintenance costs.
- (\$29,324) Decrease in Health Care Services Administration allocated costs.

### Centrally-Budgeted Expenses

- \$187,464 Increase in Workers' Compensation and Casualty insurance costs.
- \$21,426 Increase in Medical Malpractice insurance costs.
- (\$62,854) Decrease in data processing charges.
- \$720,385 Cost Allocation Plan adjustment.

### Other Charges

- \$88,517 Increase in rental assistance programs expense.

### Capital Expenditures - Equipment

- \$425,000 Droplet digital Polymerase Chain Reaction (PCR) system.
- \$360,000 Network storage upgrade.
- \$350,000 Mobile clinic.
- \$125,000 Automated liquid handler.

- \$100,000 Generator.
- \$100,000 Network switch replacements (4).
- \$100,000 Data warehouse server (2).
- \$80,000 Network servers (2).
- \$50,000 Lab water system upgrade.
- \$25,000 Fluorescence microscope.
- \$20,000 Network testing tool.
- \$10,000 Water jacket carbon dioxide incubator.
- \$7,500 PCR workstation expansion.

### Expenditure Reimbursements

- \$19,648 Increase in reimbursement from Human Services Agency for assigned staffing.

### Revenues

- \$3,217,761 Increase in State grant revenues.

### Operating Transfers In

- \$41,936 Increase in Tobacco Special Funds transfers.
- (\$154,996) Eliminate one-time American Rescue Plan Act (ARPA) funding for after action report development.
- (\$48,000) Decrease in vehicle license fee revenue.

## Program Discussion

The 2023-2024 recommended budget for Public Health Services (PHS) totals \$55,094,401, which is an increase of \$4,826,517 from the 2022-2023 adjusted budget.

The recommended budget deletes 20 vacant grant-funded positions to manage available funding for existing grant programs and in anticipation of reduced availability of funds in the future. This is in accordance with the County's no back-fill policy requiring departments to seek replacement funding or eliminate or phase out programs and positions when funding is reduced or eliminated.

# 4041000000—Public Health Services

## Health Services

These vacant positions are as follows:

Position	# Deleted
Communicable Disease Investigator	3
Sr. Communicable Disease Investigator	1
Geographic Info. Systems Specialist I-II	1
Supervising Public Health Educator	1
WIC Nutrition Assistant I-II	1
Public Health Laboratory Technician II	1
Senior Public Health Nurse	4
Office Supervisor	1
Lactation Specialist	1
Office Assistant Specialist	2
Senior Office Assistant	4
<b>Total</b>	<b>20</b>

PHS is utilizing its \$4.0 million Future of Public Health funding award accepted by the Board in November 8, 2022 (B-22-597) to transition at least 20 positions previously funded under various COVID-19 related grants to permanent public health positions.

### COVID-19: Emergency Preparedness in Action

*Programmatic summaries for COVID-19 cover calendar year 2022 to provide a full twelve months of data.*

In 2022-2023, COVID-19 response continued to be a priority for PHS, especially for Departmental Operations Center-Level II staff, with the redistribution of vaccines and test kits as well as additional response activities related to the winter and summer surges. PHS facilitated the distribution of approximately 480,000 at-home tests to county residents. PHS also distributed nearly 92,000 vaccine doses and administered or directly coordinated the administration of close to 16,000 doses by standing up more than 60 vaccine clinics. Six Test-to-Treat sites, established since May 2022, administered over 11,000 tests and offered antiviral medicine to eligible individuals. To ensure the safe re-opening of day care centers, PHS purchased 1,800 air purifiers.

PHS staff continue providing clinical guidance, outbreak management, and support services to homeless shelters, schools, and skilled nursing, long-term care, and correctional facilities. Staff also facilitate requests for testing kits, surveil individuals with vaccine breakthrough and re-infection, provide updates to stakeholders and the media, and prepare educational messaging for the public.

Altogether in 2022, PHS issued two health advisories to health care providers and generated 12 press releases. PHS webpages had nearly 80,000 visits and over 260,000 page views, while its social media platforms generated over

2.2 million views, impressions, and engagements (Facebook, Twitter, Instagram, NextDoor, and YouTube).

PHS epidemiologists, using data visualization technology, completed a comprehensive COVID-19 dashboard to continue to provide local data featuring case numbers, rates by specific demographics, and new COVID-19 vaccine data.

The PHS lab maintained testing support for community partners while enhancing its capacity to function as a regional public health lab for a multitude of other communicable diseases, including hospital-acquired infections. It continued to enhance its whole genome sequencing platform to improve surveillance capacity for timely COVID-19 variant identification and is in the process of expanding the use of this technology. The PHS lab team also presented its whole genome sequencing during the October 2022 annual California Association of Public Health Laboratory Directors meeting.

PHS continued its work with community partners on health equity, reaching out to high-risk disparate residents to promote testing and vaccinations, and provided over \$85,000 in incentives funded by grant sources.

On December 13, 2022 the Board received an oral presentation on the Countywide After-Action Report, an independent evaluation of the County's COVID-19 response. Multiple departments are participating in the development of an improvement plan and implementing recommendations in response. As the County's case rates have declined and hospitalization trends and health care system impacts have stabilized, the local health emergency declared by the County Health Officer on March 12, 2020 was terminated on February 28, 2023, as adopted by resolution of the Board of Supervisors (R-23-32).

### Vital Records

PHS staff register births, deaths, and fetal deaths occurring in the County. In 2021-2022, PHS issued over 14,000 certified birth and death certificates and over 8,000 burial permits. Nearly all certificates and permits were issued within 24 hours of request.

### Disease Control and Prevention (DCP)

DCP continued to monitor and respond to over 80 reportable communicable diseases and outbreaks, with syphilis and tuberculosis (TB) remaining priorities. In calendar year 2022, 742 syphilis and congenital syphilis cases were reported and investigated. In coordination with Correctional Health Services, PHS initiated syphilis screening and treatment at the County Jail with more than 1,000 rapid syphilis tests performed, resulting in 113 receiving treatment. In 2022, 33 active TB cases and 1,534 latent TB infections were reported. To optimize TB control efforts, a



# 4041000000—Public Health Services

## Health Services

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latent TB project was initiated in 2022, resulting in care referrals for over 500 individuals with latent TB infection. 2022 was also a busy year for the HIV team with 104 new HIV cases reported, outreach and supportive services provided to 140 clients, and case management provided for 58 clients. In line with Board priorities, PHS established an electronic notification system to close the follow-up gap for patients.

To maintain preparedness levels after the end of the COVID-19 public health emergency, PHS expanded its immunization program and unified Emerging Diseases Program (EDP), which enabled PHS to efficiently respond to both the COVID-19 and mpox emergencies. In 2022 DCP/EDP held 19 mpox clinics and administered more than 1,000 mpox vaccines.

### Maternal, Child, and Adolescent Health (MCAH)

In fall 2022, the California Department of Public Health (CDPH) notified MCAH it was awarded substantial expansion funding to grow the Black Infant Health (BIH) program. MCAH staff conducted in-depth analyses to determine how and where additional resources could best be used to reach and serve new program clients. Activities began in March 2023. MCAH also initiated its new Title V Children and Youth with Special Health Care Needs Innovation Grant from CDPH. MCAH is working closely with the California Children's Services program to identify families of children with medical complexities that would benefit from home visiting and family emotional support.

### New Public Health Facility

On February 12, 2019, the Board of Supervisors approved the establishment of a capital project to replace the 55-year-old Public Health building and laboratory located on Hazelton Avenue in Stockton (B-19-109). Construction began on August 14, 2020, and was completed in December 2022 when staff were relocated. Among the building's new features are a modernized public health lab, increased safety features with separate entrances for staff and visitors, and the latest communications technology for improved ability to connect among staff and stakeholders.

PHS received an award of \$3.0 million in Federal funding to plan and design a replacement of the Wilson Way building on the corner of Hazelton and Wilson Way, which houses the MCAH, Health Promotion and Chronic Disease Prevention, Emergency Preparedness, and Information Systems divisions. Design and engineering activities are expected to begin in 2024.

### Public Health Laboratory (Non-COVID-19)

The PHS Lab handled COVID-19 as well as non-COVID-19 routine testing and surveillance activities despite building

construction challenges, supply chain constraints, and space challenges. The laboratory hosted multiple training programs and a director fellowship.

Increased automation has resulted in faster identification of pathogens using new equipment directly interfaced with the laboratory information management system. The system is now capable of detecting 22 respiratory pathogens, including COVID-19, within 45 minutes. The laboratory has also implemented non-variola orthopoxvirus testing.

In transitioning to the new public health facility, the PHS lab team worked diligently to assure timely validation of new or moved equipment. Testing services came back online quickly with minimal impact on services offered during the move.

### National Public Health Accreditation Board (PHAB)

PHAB awarded accreditation status to PHS in May 2021. In its first annual report in June 2022, PHS was required to demonstrate its actions reflected continuous quality improvement, which was approved by PHAB.

### Health Equity Program

In alignment with the Board's priority to effectively manage one-time funds, the Health Equity Program, established with funding allocated by CDPH, began drafting the first Health Equity Action Plan (HEAP). Development was guided by a comprehensive process including a baseline organizational assessment, staff survey, focus groups, key stakeholder interviews, in-person strategy planning meetings, and virtual engagement meetings. PHS plans to finalize the HEAP in April 2023, meeting a SMART (Specific, Measurable, Attainable, Realistic, and Timely) goal to implement and prioritize allocation of these resources by the end of 2022-2023. PHS looks forward to using HEAP to guide meaningful and far-reaching health equity efforts over the next five years in collaboration with community partners. Having the plan in place is expected to be a prerequisite for future health equity related funding opportunities.

### Community Health Workers (CHW) Program

On September 28, 2021, the Board adopted a three-year Community Health Workers for COVID Response and Resilient Communities grant (R-21-131) from the Centers for Disease Control and Prevention (CDC). Grant funds are used in conjunction with community partners to recruit, train, and place CHWs, with authentic racial and cultural competencies, in 14 designated priority neighborhoods. Residents of these neighborhoods are the most impacted by historic health disparities. PHS funded six community-based organizations (CBOs) serving these neighborhoods with two CHWs each and hired two of its own for a total of 14 CHWs.

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## Health Services

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The CHWs use Unite Us, an online bi-directional referral system, to connect with clients. The project includes a robust evaluation component to determine gaps in services and social support systems that can be collectively addressed.

### Collaborative Efforts

PHS continues to work with community partners on innovative ways to promote public safety and quality of life. Examples of grant-funded projects include combatting the escalating use of fentanyl and other opioid misuse and abuse, implementing interventions to improve safety and access to local parks in low-income neighborhoods, working with public safety officers on child passenger safety and other strategies to prevent childhood injuries, and conducting community-level outreach and education to reduce the impact of both acute and chronic diseases.

### Strengthening Organizational Capacity

Reflecting the Board's priority to improve recruitment and retention rates, PHS contracted with Public Health Foundation (PHF), a nationally renowned public health workforce development expert. In January 2023, PHF initiated a multi-level assessment of PHS' organizational structure to offer recommendations to enhance overall structure, addressing staffing, adequacy of management structure, and span of control. It is anticipated to improve the ability to recruit and retain employees, especially in hard-to-fill classifications.

Throughout 2022, PHS managers and supervisors participated in a unique year-long Leadership Development Academy as part of its SMART Goal objective to provide intensive leadership training.

### Public Health Informatics Program

Planning for the new Public Health Informatics Program commenced in 2022. The program leverages advanced technologies and data analysis techniques to improve health outcomes through collection of data from sources such as electronic health records, disease surveillance systems, social media, and other digital platforms. The data collected is used to identify health trends, monitor disease outbreaks, and develop effective prevention and intervention strategies. The program also addresses health disparities among different populations through collaboration with health care providers, public health agencies, and community-based organizations to develop data-driven policies and programs. The expansion of this program is partially in response to issues noted within COVID-19 After-Action Report.

The PHF engagement includes an analysis of Information Technology (IT) operations and assessment of needs for the

Informatics Program. PHS will collaborate with Human Resources to determine appropriate staffing and may request new positions as needed during 2023-2024.

### Innovative Technology Support

Innovations driven by the response to COVID-19 have significantly enhanced ongoing capabilities. The innovative use of technology was key to successfully interfacing with community partners, clients, and the public. PHS used telephone and virtual platforms to conduct activities ranging from Women, Infants, and Children (WIC) appointments and nursing home visits to physical therapy sessions with special needs children.

IT staff also worked to increase the capacity and monitoring of laboratory systems to support scaled-up testing volume and expanded immunization registry capabilities to support new CDPH and CDC reporting and integration requirements. IT staff also significantly expanded PHS's online presence for risk communications.

PHS is rebuilding its electronic performance management system to be more responsive and proactive. Metrics based on national benchmarks will better demonstrate health outcomes and the revised system will include a high-level strategic dashboard as well as specific program level indicators, allowing staff to conduct gap analyses and track workload distribution.

## Fund Balances

### Ryan White Care Consortium Fund

The Ryan White Care Consortium General Fund Special Account (#13403) receives donations to assist HIV patients and serves as a last resort when clients do not qualify for other assistance.

Fund balance as of March 31, 2023, was \$46,679. The 2023-2024 recommended budget does not include transfers from this fund.

### Child Passenger Restraint Fund

The Child Passenger Restraint General Fund Special Account (#13404) receives a portion of fines charged to violators for not utilizing car seats appropriately. Funds are used to support the Child Passenger Safety Program, which provides education and reduced-priced car seats to clients attending training on the proper use of car seats.

Fund balance as of March 31, 2023, was \$119,918. The 2023-2024 recommended budget includes \$20,000 in transfers from this fund.

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## Health Services

### Public Health Vital Statistics Fund

The Public Health Vital Statistics General Fund Special Account (#13407), funded through a restricted portion of each birth and death certificate sold, defrays the administrative costs of collecting and reporting fees, technical support of vital record systems, and community health data collection and analysis.

Fund balance as of March 31, 2023, was \$852,981. The 2023-2024 recommended budget includes \$15,000 in transfers from this fund.

### Tobacco Program Funds

General Fund Special Accounts for the Tobacco Control Program/Proposition 99 (#13410) and California Healthcare Research and Prevention Tobacco Tax Act/Proposition 56 (#13405) receive State tobacco tax revenues for the Smoking and Tobacco Outreach/Prevention Program. Funds are transferred to the General Fund based on Program expenditures. Fund balances as of March 31, 2023, were \$151,283 and \$160,402 respectively. The 2023-2024 recommended budget includes \$684,893 in transfers from these funds, based on fund balance and new revenue.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Health Promotion &amp; Administration</b>					
<i>Births &amp; Deaths Registered</i>	12,507	14,010	14,126	14,250	14,250
<i>Health Education Presentations</i>	1,312	1,146	3,212	3,278	3,525
<b>Disease Control &amp; Prevention</b>					
<b><i>Communicable Disease Control</i></b>					
<i>Presentations/Consultations</i>	1,264	2,107	1,760	1,390	1,000
<i>Surveillance/Investigations</i>	4,020	6,355	5,120	5,340	3,500
<b>Acquired Immunodeficiency Syndrome Program</b>					
<i>HIV Tests &amp; Counseling</i>	297	326	388	450	419
<i>Case Management for HIV Clients</i>	910	710	160	138	125
<i>Syphilis</i>	1,499	1,301	1,640	1,872	1,900
<i>Chlamydia/Gonorrhea</i>	2,323	2,903	4,252	5,601	5,700
<b><i>Tuberculosis (TB) Control</i></b>					
<i>Case/Contact Investigations</i>	3,253	2,994	2,256	3,125	4,000
<i>Presentations/Consultations</i>	6,485	2,569	2,350	2,825	3,500
<i>Observed TB Therapy Visits</i>	2,542	6,485	5,446	3,763	4,500
<b>Public Health Laboratory</b>					
<i>Billable Events</i>	38,211	54,610	32,116	32,116	28,000
<b>Family Health Division</b>					
<i>Women, Infants, &amp; Children Caseload/Month</i>	5,597	5,873	6,455	6,263	7,000
<i>Maternal Child &amp; Adolescent Health Home Visits</i>	998	551	604	1,040	1,320

# 4041200000—Public Guardian/Conservator

## Health Services

Greg Diederich, Health Care Services Director  
[www.sjgov.org/departments/hcs](http://www.sjgov.org/departments/hcs)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,919,388	\$3,244,185	\$3,592,558	\$3,592,558	\$348,373
Services & Supplies	626,609	802,765	868,583	868,583	65,818
Centrally-Budgeted Expenses	83,049	27,943	53,443	53,443	25,500
Capital Expenditures	0	0	265,000	265,000	265,000
Total Expenditures	\$3,629,046	\$4,074,893	\$4,779,584	\$4,779,584	\$704,691
Expenditure Reimbursements	(29,000)	0	0	0	0
Total Appropriations	\$3,600,046	\$4,074,893	\$4,779,584	\$4,779,584	\$704,691
<b>Earned Revenues By Source</b>					
Charges For Services	\$855,950	\$750,000	\$875,000	\$875,000	\$125,000
Operating Transfers In	928,072	928,073	928,073	928,073	0
Fund Balance	1,816,024	2,396,820	2,976,511	2,976,511	579,691
Total Revenues	\$3,600,046	\$4,074,893	\$4,779,584	\$4,779,584	\$704,691
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	30.0	30.0	30.0	30.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	1.5	1.5	1.5	1.5	0.0
<b>Total Staffing</b>	31.5	31.5	31.5	31.5	0.0

- Operating Transfers In includes a General Fund Contribution of \$928,073 for 2023-2024 to support Probate Conservatorships.

## Purpose

The Office of the Public Guardian/Conservator (PG/C) ensures the protection of both the person and the estate of individuals incapacitated either by a mental illness or a major neurocognitive disorder and have been deemed to meet the medical and legal criteria for conservatorship when there is no viable alternative to public conservatorship.

The PG/C's Office provides:

- **Lanterman Petris Short (LPS) Conservatorship** services for residents who have been adjudicated by the Superior Court to be gravely disabled due to a mental illness. These services include investigation of all LPS referrals from acute care hospitals and criminal courts, establishing and maintaining benefits, paying all valid bills with client funds, consenting to mental health treatment, storage and protection of personal property, monitoring of legal matters connected to the conservatorship, and assisting Behavioral Health Services (BHS) to help the client meet treatment goals.
- **Probate Guardianship/Conservatorship** services, including investigation of referrals, placement of conservatees in appropriate least restrictive placements, consenting to medical treatment, managing estates including real and personal property, establishing and maintaining benefits, and paying valid bills with client funds.
- **Representative Payee** services as defined by the United States Social Security Administration and United States Department of Veterans Affairs for persons deemed by those agencies as unable to responsibly utilize funds for food, clothing, and shelter. The PG/C provides these services to consumers actively case managed by BHS, other incapacitated individuals in order to avoid the more restrictive conservatorship process, and for incapacitated individuals to avoid homelessness.

# 4041200000—Public Guardian/Conservator

## Health Services

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$348,373 Salary and benefits adjustments.

#### Services & Supplies

- \$60,000 Increase in residential program services.
- \$52,179 Increase in Behavioral Health Administration indirect costs.
- \$15,350 Increase in security services.
- \$14,100 Increase in utilities.
- (\$75,000) Decrease in County Counsel services.

#### Centrally-Budgeted Expenses

- \$22,473 Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

- \$225,000 Workspace reconfiguration.

#### Capital Expenditures - Structures & Improvements

- \$40,000 Flooring.

#### Revenues

- \$579,691 Increase in use of Mental Health Realignment fund balance.
- \$125,000 Increase in conservatorship fee revenue.

### Program Discussion

The 2023-2024 recommended budget for the Office of the Public Guardian/Conservator (PG/C) totals \$4,779,584, which is an increase of \$704,691 from the 2022-2023 adjusted budget.

#### Lanterman Petris Short (LPS) Conservatorship

The PG/C's Office continues to receive a high volume of referrals from the criminal justice system for clients arrested for a criminal offense who may be incompetent to stand trial and may have a mental illness. These referrals account for

approximately half of the LPS referrals received by the PG/C's Office. Frequently, cases are referred multiple times after the PG/C has declined to pursue a conservatorship once an investigation determines the client does not meet the medical or legal criteria for conservatorship. The PG/C's Office is obligated by law to perform a new investigation for each referral and evaluations are subsequently performed to determine if the client will meet the criteria for LPS conservatorship.

COVID-19 had a significant impact on the availability of housing placements for LPS conservatees. Some facilities quarantined due to an outbreak among staff or residents, resulting in decreased placements to or from more appropriate settings. Testing LPS conservatees for COVID-19 continues to be a part of the medical clearance necessary before facilities will accept a client for placement. Shortages continue for placements at all levels from acute care hospitals and locked psychiatric facilities to Crisis Residential Facilities and Board and Cares. Conservatees with behavioral, legal, or criminal issues are particularly difficult to place since these facilities can be more selective due to the scarcity of beds. The PG/C's Office continues to work collaboratively with BHS to locate and secure housing for conservatees, who are required by law to reside in a community care licensed facility.

State hospitals, which only admit the most difficult to treat LPS conservatees, are now focused on clearing the backlog of incompetent to stand trial (IST) clients due to court mandates. Counties throughout California, including San Joaquin County, have established programs for competency training to alleviate some of the pressure on the State regarding the IST population. However, this could again become an issue should the State determine it necessary to discontinue admitting and/or begin discharging LPS clients to fulfill IST obligations. Although San Joaquin County has a limited number of LPS conservatees placed in State Hospitals, clients in these hospitals are the most unsafe and difficult to treat conservatees. There are generally no other locked facilities able to manage and treat these clients whose behavior poses a risk to staff and others. If the State stops accepting LPS conservatees, other counties would also need to move their LPS conservatees out of State hospitals, further impacting an already strained inpatient behavioral health system.

Senate Bill 1338, the Community Assistance, Recovery, and Empowerment (CARE) Court Act, was passed and signed into law in July 2022. The first cohort of counties is now working to implement CARE Courts by October 1, 2023. San Joaquin County is part of the second cohort, which will need to be established by December 1, 2024. The PG/C's Office is actively collaborating with BHS and partner agencies. Although the PG/C's Office has no formal role in CARE Court proceedings, LPS referrals will likely increase due to referrals from the court if a client fails or refuses to participate

# 4041200000—Public Guardian/Conservator

## Health Services

in the CARE Court process. An increase in CARE Court ordered evaluations to BHS could potentially lead to increased hospitalizations, triggering referrals from acute psychiatric hospitals for conservatorships. Another concern is an influx of clients entering CARE Court requiring housing and a potential increase in overall clients competing for limited placement and treatment services. The CARE Court Act does not provide any new funding for housing to BHS or the PG/C's Office.

As part of Health Care Services Agency's (HCS) SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals, the PG/C will develop protocols to compliantly access Mental Health Services Act (MHSA) funding and increase Medi-Cal billable services to reduce reliance on Realignment funding by July 2023.

### Probate Conservatorship

Referrals in 2022-2023 remained consistent with 2021-2022. Although referral numbers remain stable, the PG/C faces a number of challenges. Due to changes in Superior Court processes, the average time required to establish probate conservatorship has increased from 6 weeks to three months for filing a petition in simpler cases and from 3 months to up to a year for more complex cases. Increased processing times

also affect petitions to sell property and for temporary conservatorships.

The PG/C is financially responsible for Probate conservatees' client care, including case management and placement. Shortages of appropriate housing placements persist, especially for clients with a major neurocognitive disorder and an accompanying behavioral disturbance diagnosis. Referrals from criminal courts where the proposed conservatee is incompetent due to a major neurocognitive disorder have increased. Facilities are hesitant to admit these conservatees directly from the jail. Adult Protective Services make up a significant number of probate referrals. These referrals may involve abuse and neglect and require swift action. There are no emergency placements for probate conservatees requiring immediate placement due to neglect, abuse, or for clients with behavioral or criminal issues.

The PG/C's Office continues to work in collaboration with HCS to explore an increase in General Fund support for discharge from inpatient beds and placements, as the cost of probate conservatorships and placements are not a compliant use of Mental Health Realignment funds. Results of a preliminary financial review indicate the \$928,073 historically provided to the PG/C is substantially less than the cost of providing probate conservatorship services.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Referrals</b>					
<i>LPS Conservatorship Referrals</i>	118	126	125	119	122
<i>Probate Conservatorship Referrals</i>	52	56	44	43	45
<i>Sub-Payee Referrals</i>	34	20	24	20	20
<b>Cases</b>					
<i>LPS Conservatorship Cases</i>	271	276	280	279	275
<i>Probate Conservatorship Cases</i>	182	197	184	173	175
<i>Sub-Payee Cases</i>	524	506	510	498	495
<i>Homeless (all are Sub-Payee Cases)</i>	10	10	14	12	13

# 4041800000—Emergency Medical Services

## Health Services

Greg Diederich, *Health Care Services Director*  
[sigov.org/departments/ems/](http://sigov.org/departments/ems/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,916,826	\$2,070,353	\$2,415,323	\$2,415,323	\$344,970
Services & Supplies	564,016	1,408,449	1,512,295	1,512,295	103,846
Centrally-Budgeted Expenses	171,672	160,069	177,215	177,215	17,146
Capital Expenditures	0	0	70,500	70,500	70,500
Total Expenditures	\$2,652,514	\$3,638,871	\$4,175,333	\$4,175,333	\$536,462
Expenditure Reimbursements	(12,000)	0	0	0	0
Total Appropriations	\$2,640,514	\$3,638,871	\$4,175,333	\$4,175,333	\$536,462
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$1,166,891	\$1,171,885	\$1,179,585	\$1,179,585	\$7,700
Aid From Other Governments	408,259	297,554	340,000	340,000	42,446
Charges For Services	499,481	537,087	553,753	553,753	16,666
Miscellaneous Revenues	129,206	201,000	200,000	200,000	(1,000)
Operating Transfers In	21,856	24,000	24,000	24,000	0
Total Revenues	\$2,225,693	\$2,231,526	\$2,297,338	\$2,297,338	\$65,812
<b>Net County Cost</b>	\$414,821	\$1,407,345	\$1,877,995	\$1,877,995	\$470,650
<b>Allocated Positions</b>	12.0	12.0	14.0	14.0	2.0
<b>Temporary (Full-Time Equivalent)</b>	0.4	0.0	0.0	0.0	0.0
<b>Total Staffing</b>	12.4	12.0	14.0	14.0	2.0

## Purpose

The San Joaquin County Emergency Medical Services (EMS) Agency monitors and enforces more than 60 agreements, permits, and authorizations to provide response and transport, receiving and specialty care hospital designations, and training programs, ensuring an organized and coordinated response to EMS system needs within the County. EMS also administers the Hospital Preparedness Program (HPP) grant, which provides funding for disaster planning and training, including hospital surge capacity, mass fatality management, emergency communications, and advanced registration of medical volunteers. EMS serves as the lead agency for all Continuous Quality Improvement (CQI) activities throughout the County's EMS system.

EMS serves as the Medical Health Operational Area Coordinator and is the designated point of contact for medical and health mutual aid with local, regional, and State agencies. EMS maintains an on-call duty officer, 24 hours a day, 7 days per week to respond to mutual aid requests, coordinate disaster medical operations, and assist hospitals and providers. EMS ensures accountability and transparency to the public through detailed system reports on the EMS website, a public and stakeholder comment process to receive input on policy development, and the ability to participate in quarterly EMS Advisory Committee meetings which are open to designated stakeholder representatives and EMS system participants.

EMS funding is provided through the collection of contractual revenues, fees, grants, General Fund allocation, accumulated reserves from ambulance contract performance penalties, and Maddy EMS Funds.

# 4041800000—Emergency Medical Services

## Health Services

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$63,522 Salary and benefits adjustments.
- \$136,356 Add one Pre-Hospital Care Coordinator.
- \$135,774 Add one Emergency Medical Services Analyst.
- \$9,318 Increase in overtime.

#### Services & Supplies

- \$200,000 Establish professional services budget for EMS system assessment and RFP development.
- \$136,000 Increase in HPP program costs.
- \$50,000 Increase in software costs for Stockton Fire Computer Aided Dispatch EMS integration.
- \$16,438 Increase in contract data management services.
- \$11,769 Increase in fleet services charges based on adding a vehicle to the fleet.
- \$11,500 Increase in Agricultural Center room rentals.
- (\$260,000) Decrease in budget for unprotected area fire response.
- (\$71,381) Decrease in County Counsel services.

#### Centrally-Budgeted Expenses

- \$79,881 Increase in Workers' Compensation and Casualty insurance costs.
- (\$65,737) Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

- \$70,500 Vehicle.

#### Revenues

- \$42,446 Increase in HPP grant revenue.
- \$12,300 Increase in training revenue.
- \$10,700 Increase in license fee revenue.

### Program Discussion

The 2023-2024 recommended budget for Emergency Medical Services (EMS) totals \$4,175,333, which is an increase of \$536,462 from the 2022-2023 adjusted budget.

During 2023-2024 EMS will continue to:

- Evaluate the delivery of Advanced Life Support (ALS) and Basic Life Support (BLS) services to determine appropriate level of response and medical control regulatory compliance.
- Ensure the efficient and effective provision of patient care through CQI activities.
- Monitor implementation of agreements for emergency ambulance services, including ALS inter-facility transfers and critical care transport. Performance requirements include response time standards for Code 3 (red lights and siren) and Code 2 (without red lights and siren), as well as other performance and quality of care measures.
- Review, audit, and approve EMS Continuing Education (CE) programs for compliance with regulations and ensure high quality education access.
- Create and revise policy recommendations through a standardized policy review cycle and EMS Advisory Committee stakeholder input.
- Process and issue non-emergency ambulance permits and enter into service agreements as needed with providers of ALS and BLS first response, specialty care, and air ambulance service.

#### EMS Replacement Facility Project

In 2022, an EMS replacement facility to accommodate office space, training and meeting space, medical supply storage, and distribution needs was included in the County's 5-Year Capital Improvement Plan and designated for future construction by the Capital Review Committee. Funding will be provided from Maddy EMS special revenue as approved by the Board of Supervisors on June 5, 2018 (B-18-329) and County Capital Outlay Funds. Planning for future construction efforts will continue in 2023-2024.

#### Stroke, Cardiac, and Trauma Systems

San Joaquin County continues to benefit from EMS efforts to designate all seven general acute care hospitals as Primary Stroke Centers, focusing on rapid identification, treatment, and under specific circumstances, transfer to Comprehensive Stroke Center hospitals located outside of the County. In addition, EMS continues to evaluate and monitor two designated ST Elevation Myocardial Infarction (STEMI)



# 4041800000—Emergency Medical Services

## Health Services

Receiving Centers, providing specialized personnel and care for specific heart attack cases due to blocked arteries. EMS facilitated the designation of San Joaquin General Hospital to a Level II trauma center in 2021 and continues to monitor and evaluate the trauma system of care in San Joaquin County.

During 2023-2024, EMS will continue to:

- Implement and evaluate specialty care regulations into existing systems of cardiac and stroke care and collaborate with acute care hospitals designated as primary stroke and STEMI cardiac centers to evaluate system performance and implement improvements as needed.
- Report to the national Cardiac Arrest Registry to Enhance Survival (CARES) administered by Emory University. CARES assists local communities with identifying and tracking cases of cardiac arrest and identifying opportunities for improvement in the treatment of out-of-hospital cardiac arrest.
- Monitor and evaluate the County's trauma system, including oversight of San Joaquin General Hospital's performance as the County's designated Level II trauma center and adhere to benchmarks and standards of care.

### Ambulance Patient Offload Delay

In 2023-2024, EMS will continue to address Ambulance Patient Offload Delay (APOD) at receiving hospitals. APOD results in extensive wait times for arriving ambulance patients, while also negatively impacting the availability of ambulances for other emergency responses. EMS adopted a SMART goal of identifying and addressing local causes to reduce these wait times by five percent. State regulations are also being crafted to address the issue Statewide.

EMS has adopted technology measuring APOD and enabling real-time tracking of delays by hospitals, ambulance providers, public safety dispatch centers, and other system participants. These tools will assist in meeting State mandates for tracking and reporting APOD data.

### Commitment to Homeless Services

The EMS system is the ultimate medical safety net, often serving as the only access point to health care services for homeless individuals and families. It is designed to ensure prehospital emergency medical care, transport, and access to specialty services (such as trauma, stroke, and cardiac centers) are available and delivered universally to all patients regardless of socio-economic status.

EMS has provided the universal delivery of ALS and BLS services through Exclusive Operating Area agreements with

emergency ambulance service providers, as an appropriate and efficient manner for fulfilling the County's statutory indigent health care obligations. EMS continues to identify and refer prehospital patients most at risk for homelessness to the County's Whole Person Care Program using processes developed in 2018.

### EMT and Paramedic Training Access

EMS has collaborated with local college institutions to expand access to EMT and paramedic training programs. Delta College has applied for approval of an EMT training program to start in fall of 2023.

### Fire Response in Unprotected Areas

The 2022-2023 budget was augmented by \$500,000 during final budget hearings to support fire response in unprotected areas. The program began January 3, 2023. As of March 31, 2023, two fire districts are participating with 18 reimbursement claims processed. The 2023-2024 budget includes \$240,000 in order to continue reimbursements to fire districts for eligible costs.

## Fund Balances

Maddy EMS Special Revenue Funds are generated from court fines, penalties, forfeitures, and a portion of violator traffic school fees. Monies collected are distributed by formula to fund EMS administrative activities, to physicians and surgeons for uncompensated emergency services, to hospitals providing disproportionate trauma services, and to other emergency medical services as determined by the County, including capital projects supporting EMS.

In 2017-2018 and 2018-2019, the Board (B-18-329, B-19-309) authorized transfers totaling \$3.4 million in net penalty revenue to the Maddy-Other EMS fund (#20804) for future EMS capital facility needs, in the amounts of \$2,097,000 and \$1,301,000, respectively. These funds will be significant in offsetting General Fund costs for construction of the EMS replacement facility.

As of March 31, 2023, Maddy EMS Special Revenue Fund balances were:

Maddy EMS	Fund No.	Amount
Administration	20801	\$15,295
Physician Services	20802	\$117,624
Hospital Services	20803	\$715,276
Other EMS	20804	\$6,387,353

The 2023-2024 budget includes \$24,000 in transfers in from the Maddy Administration Special Revenue Fund (#20801), based on anticipated new revenue received in 2023-2024.

# 4041800000—Emergency Medical Services

## Health Services

### Supplemental Requests

EMS is requesting supplemental funding of \$554,399 for the following:

#### *In-County Paramedic Training*

One-time funding of \$272,130 is requested to add an Emergency Medical Services Analyst (\$135,774) and Pre-Hospital Care Coordinator (\$136,356) to establish a local paramedic training program run through EMS for the first time in decades. EMS plans on a spring 2024 course to expand access to paramedic training to help mitigate staffing shortages experienced by all EMS providers. This program is expected to expand after the new EMS facility is completed. Beginning in 2024-2025, an associated increase in revenue is expected to cover the cost of the positions.

#### *EMS Assessment and Request for Proposal (RFP) Development Consultant*

One-time funding of \$200,000 is requested to initiate the process to revise the EMS Transportation Plan through procurement of an EMS consulting service to provide an objective EMS system assessment. These strategic planning efforts will result in the development of a RFP to create potential revisions to the ambulance system design which will begin to serve the County starting in May 2026. EMS will analyze incident and patient care data and gather input from stakeholders to modify the emergency ambulance system design as may be necessary to continue to meet the needs of the County and patients.

#### *Vehicle and Vehicle Operating Expense*

Funding of \$82,269 is requested for the purchase of a vehicle (\$70,500) and annual operating expense (\$11,769) to provide EMS the ability to respond emergently to disasters and coordinate medical facility and ambulance evaluations.

The recommended budget has been augmented by \$554,399 to address these requests.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>9-1-1 EMS Patient Contacts</i>	63,816	64,765	70,243	71,712	75,924
<i>Major Trauma Patients</i>	3,463	4,204	3,739	3,802	4,216
<i>Cardiac STEMI Patients</i>	331	333	312	325	326
<i>Acute Stroke Patients</i>	1,544	1,408	1,439	1,440	1,458
<i>EMS Personnel Applications</i>	710	803	702	700	710
<i>EMS Training and Continuing Education Program Applications</i>	4	5	5	6	6

# 4045415000—California Children's Services

## Health Services

Greg Diederich, Health Care Services Director  
[www.sjgov.org/departments/hcs](http://www.sjgov.org/departments/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$5,051,778	\$6,685,175	\$7,093,558	\$7,093,558	\$408,383
Services & Supplies	374,895	654,822	649,273	649,273	(5,549)
Centrally-Budgeted Expenses	118,342	123,059	119,533	119,533	(3,526)
Total Expenditures	\$5,545,015	\$7,463,056	\$7,862,364	\$7,862,364	\$399,308
Expenditure Reimbursements	(36,881)	0	0	0	0
Total Appropriations	\$5,508,134	\$7,463,056	\$7,862,364	\$7,862,364	\$399,308
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$5,697,892	\$5,530,950	\$5,654,736	\$5,654,736	\$123,786
Charges For Services	900	1,000	1,000	1,000	0
Miscellaneous Revenues	181,277	4,000	0	0	(4,000)
Total Revenues	\$5,880,069	\$5,535,950	\$5,655,736	\$5,655,736	\$119,786
<b>Net County Cost</b>	(\$371,935)	\$1,927,106	\$2,206,628	\$2,206,628	\$279,522
<b>Staffing</b>					
Allocated Positions	46.0	46.0	46.0	46.0	0.0
Temporary (Full-Time Equivalent)	0.8	0.8	1.5	1.5	0.7
Total Staffing	46.8	46.8	47.5	47.5	0.7

## Purpose

California Children's Services (CCS) is a State-mandated program providing diagnostic and treatment services, medical case management, and physical and occupational therapy services to financially and residentially eligible children and young adults under age 21 with a qualifying medical condition.

Public Health Services (PHS) administers CCS by arranging, directing, authorizing, and paying for medical care, equipment, and rehabilitation services for participants with a CCS-eligible chronic medical condition such as cystic fibrosis, hemophilia, cerebral palsy, heart disease, cancer, traumatic injury, and infectious disease producing major sequelae. CCS also provides medical therapy services delivered at public schools.

CCS funding is derived from a State/County cost-sharing formula and Federal reimbursement. Currently, approximately 70% of CCS-eligible children are also Medi-Cal eligible.

## Major Budget Changes

### Salaries & Employee Benefits

- \$378,258 Salary and benefits adjustments.
- \$30,125 Increase in extra-help.

- \$8,000 Increase in communications expense for Lathrop office.
- (\$25,000) Decrease in furniture costs due to completion of one-time purchases.
- (\$6,000) Decrease in utilities expense due to Lathrop move.

### Services & Supplies

- \$17,242 Increase in Health Care Services Administration allocated costs.

### Centrally-Budgeted Expenses

- (\$13,461) Decrease in data processing charges.

# 4045415000—California Children's Services

## Health Services

- (\$10,374) Decrease in Casualty insurance costs.
- \$17,987 Cost Allocation Plan adjustment.

### Revenues

- \$123,786 Increase in grant revenues.

## Program Discussion

The 2023-2024 recommended California Children's Services (CCS) budget totals \$7,862,364, which is an increase of \$399,308 from the 2022-2023 adjusted budget.

### Diagnostic and Treatment Claims

In any given fiscal year, Public Health Services (PHS) may receive excessive referrals of children with CCS-eligible conditions for which there are insufficient funds available for diagnosis, treatment, and therapy. In such instances, program options may include:

- Increasing County General Fund contribution to meet program needs.
- Ceasing to authorize services not covered by Medi-Cal.
- Prioritizing conditions for which authorizations are issued and declining those not meeting priority criteria.

While the number of authorization requests for services covered by Medi-Cal has been growing, funding for CCS expenditures is expected to be sufficient in 2023-2024.

### Medical Therapy Program (MTP)

In accordance with Federal statutes, some children may receive therapy services medically necessary to receive an education. State law requires CCS provide physical and occupational therapy to children in public schools when such therapy is included in their individualized education plans. Children receiving services through the MTP are not necessarily enrolled in CCS.

The five-year pilot project School-Based Tele-Physiatry Assistance for Rehabilitative and Therapeutic Services (STARS) with UC Davis ended on July 31, 2022. UC Davis initiated and signed a new contract, allowing PHS to keep UC Davis-owned telemedicine equipment used by the MTP. The program uses a hybrid telemedicine model, and clients are provided opportunities to meet with a physician remotely, if unable to visit in-person.

The MTP converted hard copy charts into electronic formats, which are now stored in a PHS data system, improving operational efficiencies.

### Child Health and Disability Prevention (CHDP)

The State proposed to sunset the CHDP program by July 1, 2024. While funding for associated County positions will be eliminated, it is unknown at this time if alternative funding will be available to maintain these positions in 2024-2025. Childhood Lead Poisoning Prevention activities funded by CHDP will also be eliminated from the PHS budget in 2024-2025; however, PHS will remain responsible for providing Childhood Lead Poisoning prevention activities funded through the State Childhood Lead Poisoning Prevention Program (CLPPP). It is anticipated the Health Care Program for Children in Foster Care will remain and transition to a stand-alone program.

### Office Space

CCS relocated to a leased site in Lathrop in August 2022, along with the Neighborhood Preservation and Whole Person Care units of the Health Care Services Agency (A-22-44).

## Fund Balance

### CCS Special Account

The CCS General Fund Special Account (#13401) receives donations to provide CCS clients with items deemed necessary by the medical case manager but do not qualify for reimbursement through the CCS program. Fund balance as of March 31, 2023, was \$3,244. The 2023-2024 recommended budget does not include transfers from this fund.

## Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<i>New Referrals</i>	2,644	2,942	3,002	2,968	2,915
<i>New Cases Opened</i>	1,605	1,854	2,161	2,254	2,333
<i>Medical Therapy Treatment Units</i>	11,733	6,798	8,828	9,800	10,500

# 4049500000—Health Care Services Administration

## Health Services

Greg Diederich, Health Care Services Director  
[www.sjgov.org/departments/hcs](http://www.sjgov.org/departments/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$4,957,506	\$5,341,361	\$6,339,110	\$6,339,110	\$997,749
Services & Supplies	105,777	385,535	190,650	190,650	(194,885)
Centrally-Budgeted Expenses	134,558	145,742	126,179	126,179	(19,563)
Total Expenditures	\$5,197,841	\$5,872,638	\$6,655,939	\$6,655,939	\$783,301
Expenditure Reimbursements	(3,917,055)	(5,872,638)	(6,655,939)	(6,655,939)	(783,301)
Total Appropriations	\$1,280,786	\$0	\$0	\$0	\$0
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$1,280,786	\$0	\$0	\$0	\$0
Total Revenues	\$1,280,786	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	31.0	30.0	32.0	32.0	2.0
Temporary (Full-Time Equivalent)	0.8	0.0	0.0	0.0	0.0
Total Staffing	31.8	30.0	32.0	32.0	2.0

## Purpose

Health Care Services Administration (HCSA) provides administrative, fiscal, human resources, information technology, and policy oversight and coordination for the Health Care Services (HCS) Agency, which is composed of the following fourteen budget units:

- Behavioral Health Administration (BHA)
- California Children's Services (CCS)
- Correctional Health Services (CHS)
- Emergency Medical Services (EMS)
- HCS Administration (HCSA)
- Office of the Medical Examiner (OME)
- Mental Health Pharmacy (MHP)
- Mental Health Services (MHS)
- Neighborhood Preservation (NP)
- Public Guardian/Conservator (PG/PC)
- Public Health Services (PHS)
- Substance Use Disorder Services (SUDS)
- Veterans Services Office (VSO)
- Whole Person Care (WPC) Program

Funding for HCSA is provided exclusively through reimbursement from HCS departments.

# 4049500000—Health Care Services Administration

## Health Services

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### Major Budget Changes

#### Salaries & Employee Benefits

- \$412,074 Salary and benefits adjustments.
- \$168,439 Full-year cost of a Department Information Systems Analyst III added midyear 2022-2023.
- \$182,670 Add a Department Information Systems Analyst IV.
- \$234,566 Transfer a Department Information Systems Analyst IV from Information Systems Division (#8240000000).

#### Services & Supplies

- (\$174,410) Decrease in costs for WPC and IT related contracts budgeted directly by HCS departments.
- (\$15,650) Decrease in rent based on formula reallocation of costs to OME.

#### Centrally-Budgeted Expenses

- (\$47,813) Decrease in data processing charges.
- \$19,487 Cost Allocation Plan adjustment.

#### Expenditure Reimbursements

- \$783,301 Increase in reimbursement from HCS departments.

### Program Discussion

The 2023-2024 recommended budget for Health Care Services Administration (HCSA) totals \$6,655,939, which is an increase of \$783,301 from the 2022-2023 adjusted budget.

#### Staffing

The 2023-2024 budget includes new Information Technology (IT) positions to support the technology needs of the Health Care Services (HCS) Agency and a full transition of all computer end points being managed internally for increased HIPAA security and compliance. More than half of the cost of an added Department Information Systems Analyst IV will be reimbursed by Correctional Health Services during 2023-2024 to support

the implementation of the Electronic Health Record (EHR) upgrade project.

As part of its SMART goals, all members of the Agency's management team will complete relevant National Incident Management/Standardized Emergency Management System training by December 2023. Due to the serial nature of training requirements and number of hours of individual training required for this goal, which exceeds the revised County standard, some courses are scheduled during early calendar year 2024.

#### Health Care Services Agency Funding

In 2019-2020, the State eliminated the redirection of Mental Health Realignment growth funds previously used to fund the Coordinated Care Initiative. This action should have resulted in additional Realignment funding directed to Behavioral Health Services (BHS), however, funds were redirected by the State to resolve findings of a Federal audit of the Statewide Specialty Mental Health system. The impact to the County was the loss of approximately \$3.2 million in Mental Health Realignment funding over a four-year period. This redirection was paused due to economic uncertainty and associated tax revenue impacts from the COVID-19 public health emergency.

On January 27, 2022, BHS received notification from the State that the recoupment would be reinstated in 2022-2023, as well as three other audit recoveries, resulting in the net reduction in 1991 Mental Health revenues of approximately \$1.4 million per year for fiscal years 2022-2023 through 2024-2025. These funds are used by BHS as working capital for eventual certified public expenditure reporting and the retrospective draw down of Federal financial participation for Medi-Cal services.

The loss of these funds may negatively impact the Agency's overall service capacity and therefore starting in fiscal year 2022-2023, the HCSA budget no longer included a transfer of 1991 Mental Health Realignment funds to subsidize the Agency. Net unallocated expenses are reimbursed by HCSA-supported divisions based upon an FTE methodology.

#### Homelessness

Staff assigned to HCSA continue to partner with St. Mary's Dining Room, community stakeholders, and Housing Authority of the County of San Joaquin to expand shelter bed capacity and increase permanent supportive housing in alignment with HCS's SMART goals. These projects include 250 new non-congregate shelter beds, breaking ground for Park Center Housing Project for 51 units of new permanent supportive housing, and breaking ground for Victory Gardens for 49 units of new permanent supportive housing, all expected by December 2023.

# 4049600000—Whole Person Care Program

## Health Services

Greg Diederich, Health Care Services Director  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$74,143	\$1,117,394	\$2,147,242	\$2,147,242	\$1,029,848
Services & Supplies	1,809,150	1,561,864	574,650	574,650	(987,214)
Centrally-Budgeted Expenses	0	0	11,062	11,062	11,062
Capital Expenditures	0	190,000	0	0	(190,000)
Operating Transfers Out	2,038,066	0	0	0	0
Total Expenditures	\$3,921,359	\$2,869,258	\$2,732,954	\$2,732,954	(\$136,304)
Expenditure Reimbursements	0	(1,036,115)	(250,000)	(250,000)	786,115
Total Appropriations	\$3,921,359	\$1,833,143	\$2,482,954	\$2,482,954	\$649,811
<b>Earned Revenues By Source</b>					
Interest/Rents	\$6,410	\$15,000	\$15,000	\$15,000	\$0
Aid From Other Governments	2,326,559	0	1,523,000	1,523,000	1,523,000
Charges For Services	0	822,000	75,000	75,000	(747,000)
Miscellaneous Revenues	0	0	529,489	529,489	529,489
Operating Transfers In	1,019,033	190,000	0	0	(190,000)
Fund Balance	569,357	806,143	340,465	340,465	(465,678)
Total Revenues	\$3,921,359	\$1,833,143	\$2,482,954	\$2,482,954	\$649,811
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	7.0	13.0	21.0	21.0	8.0
<b>Temporary (Full-Time Equivalent)</b>	0.0	0.5	0.0	0.0	(0.5)
<b>Total Staffing</b>	7.0	13.5	21.0	21.0	7.5

## Purpose

The Whole Person Care (WPC) Program provides a whole-person approach to care to address both clinical and non-clinical needs for high need individuals experiencing homelessness. WPC began as a pilot under a former California's Section 1115 Federal Medicaid (Medi-Cal in California) Waiver approved by the Centers for Medicare and Medicaid Services on December 30, 2015. After the Medicaid demonstration waiver ended on December 31, 2021, the WPC program began to operate under a new multi-year initiative implemented by the California Department of Health Care Services (DHCS) effective January 1, 2022, called California Advancing and Innovating Medi-Cal (CalAIM). CalAIM created overarching policy changes across all Medi-Cal delivery systems to transition all existing Managed Care authorities into one consolidated 1915(b) California managed care waiver, including existing WPC pilot program services.

The County's WPC Program serves individuals falling into one or more of three eligible populations: 1) individuals experiencing homelessness with at least one qualifying complex physical or behavioral health need with an inability to successfully self-manage, 2) individuals experiencing homelessness and are transitioning from incarceration or transitioned from incarceration within the last 12 months and have at least one qualifying complex need, and 3) individuals experiencing homelessness who meet Behavioral Health Services (BHS) eligibility criteria for severe and persistent mental illness and/or substance use disorder.

# 4049600000—Whole Person Care Program

## Health Services

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The WPC Program helps effectively coordinate the physical health, behavioral health, and social service needs of the most vulnerable, high-risk, service resistant individuals, with a primary focus on Medi-Cal beneficiaries, who are high utilizers of multiple publicly funded systems and who continue to have poor outcomes. WPC uses a person-centered approach in addressing the social determinants of health with the goal of a better quality of life for individuals as well as long-term cost avoidance to publicly funded systems of care.

### Major Budget Changes

#### Salaries & Benefits

- \$351,355 Salary and benefit adjustments.
- \$543,077 Add six Senior Social Workers.
- \$77,399 Add one Senior Office Assistant.
- \$76,781 Add one Community Health Outreach Worker.
- (\$18,764) Eliminate extra-help budget.

#### Services & Supplies

- \$24,000 Establish budget for data connectivity for Lathrop office.
- \$15,000 Increase in computer supply purchases.
- (\$924,000) Decrease in outsourced case management services now performed by County staff.
- (\$86,905) Eliminate participant incentives for discontinued MHSA-funded project.
- (\$25,296) Decrease in motor pool costs based on experience.

#### Centrally-Budgeted Expenses

- \$10,320 Establish budget for data processing charges.

#### Cost Reimbursements

- (\$786,115) Decrease in reimbursement from PHLA grant due to end of one-time funding.

#### Revenues

- \$1,523,000 Establish budget for CITED grant revenue.

- \$529,489 Establish budget for start-up revenue from Health Plan of San Joaquin and Health Net.
- (\$747,000) Decrease in insurance billing revenue based on experience.
- (\$465,678) Decrease in use of fund balance.

#### Operating Transfers In

- (\$190,000) Discontinue transfer from the General Fund due to completed purchases.

### Program Discussion

The 2023-2024 recommended budget for the Whole Person Care (WPC) Program totals \$2,732,954, which is a decrease of \$136,304 from the 2022-2023 adjusted budget.

In July 2022, WPC transitioned from being directly managed by Health Care Services Administration to Public Health Services (PHS) in order to better provide integrated support to the growing program. Current funding sources consist of fund balance; services billable under California Advancing and Innovating Medi-Cal (CalAIM) for enhanced care management (ECM) to eligible Medi-Cal beneficiaries; CalAIM Incentive Payment Program funds; Providing Access and Transforming Health (PATH) Capacity and Infrastructure Transition, Expansion, and Development (CITED) funding accepted in March 2023 (B-23-103); the compliant use of Permanent Local Housing Allocation (PLHA) funds; and local Mental Health Services Act (MHSA) funding. The long-term sustainability of funding is a concern and will require the ability to eventually draw down considerably more billable Medi-Cal ECM revenue.

Participating entities in the WPC Program continue to expand and currently include: Health Care Services Administration, Behavioral Health Services (BHS), San Joaquin General Hospital (SJGH), San Joaquin Health Centers, Public Health Services (PHS), Substance Use Disorder Services, Correctional Health Services, Veterans Services Office, the Human Services Agency, the City of Lodi, the City of Tracy, Gospel Center Rescue Mission (GCRM), Stockton Shelter for the Homeless, St. Mary's Dining Room, Health Plan of San Joaquin, Health Net, Stocktonians Taking Action to Neutralize Drugs (STAND), the Housing Authority of the



# 4049600000—Whole Person Care Program

## Health Services

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County of San Joaquin, Central Valley Low Income Housing Corporation, Community Medical Centers, Dignity Health St. Joseph's Medical Center, the San Joaquin Community Health Information Exchange (HIE), and other community-based organizations providing services and support to individuals experiencing homelessness.

### California Advancing and Innovating Medi-Cal (CalAIM)

CalAIM is a multi-year initiative proposed by the State as a framework to improve the quality of life and health outcomes by implementing a broad delivery system, programs, and payment reforms. The major components of CalAIM build upon the successful outcomes of various pilot programs from previous Federal Waivers (including but not limited to WPC, Health Homes, and the Coordinated Care Initiative) and are anticipated to result in better quality of life for Medi-Cal members as well as long-term cost avoidance. The three primary goals of CalAIM are: 1) identify and manage member risk and need through whole person care approaches and addressing social determinants of health; 2) convert Medi-Cal into a more consistent and seamless delivery system by reducing complexity and increasing flexibility; and 3) improve quality outcomes, reduce health disparities, and drive delivery system transformation and innovation through value-based initiatives, modernization of systems, and payment reform.

The California Department of Health Care Services (DHCS) formally released the CalAIM proposal in October 2019 and conducted extensive stakeholder engagement between November 2019 and February 2020. CalAIM was planned to begin on January 1, 2021, but DHCS postponed implementation to January 1, 2022, to allow DHCS and all partners to focus their limited resources on needs arising from the COVID-19 public health emergency.

### Data and Technology

A major WPC goal is to coordinate client care in real-time and evaluate progress in improving individual and population health. WPC utilizes three primary platforms for data repository and information sharing: the HIE, Activate Care, and the Homeless Management Information System (HMIS). The HIE serves as the central data repository for health care information sharing, which includes clinical values, diagnosis, active medication lists, and other clinical notes and structured data. Activate Care is the primary platform used by WPC partners for referrals, coordination of care, document sharing, and receipt of real-time hospital admission alerts. HMIS is a local information technology system used to collect client-level data and data on the provision of housing and services to those experiencing homelessness and persons at risk of homelessness. WPC continues building toward real-time care management capabilities among all WPC

participating entities for enrollees opting into program services. It is anticipated Medi-Cal Managed Care plans will adopt Activate Care for use by other contracted CalAIM service providers.

WPC continues to partner with United Way, Dignity Health, Kaiser Permanente, and 211 San Joaquin to support the Countywide implementation of a Connected Community Network (CCN) to electronically coordinate non-clinical referrals between various community-based social service organizations and other entities providing services to at-risk populations.

### WPC Program Staffing

As part of the transition to CalAIM, WPC began utilizing County staff for outreach instead of contracting for services. Initial staffing was established in November 2021, by adding a Social Worker Supervisor, four Community Health Outreach Workers, a Public Health Nurse I-II, and a Senior Office Assistant to staffing transferred by Health Care Services Administration (HCSA) consisting of a Management Analyst III and a Senior Office Assistant. In 2022-2023 two Community Health Outreach Workers, a Public Health Nurse I-II, and Mental Health Specialist I-II were added for a total of 13.

CITED funding will allow WPC to continue building its capacity and infrastructure by placing staff at the County Jail and emergency departments, as well as providing post incarceration and housing-focused staff for seamless coordination of care, increased delivery of Medi-Cal billable ECM services, identification and reduction of critical gaps and needs, and improvement of systems for data sharing. Additionally, the WPC team will work in collaboration with BHS, other PHS programs, SJ Health Centers, Tracy Police Department, and other partners on outreach to populations of focus at shelters, access centers, encampments, outreach events, hospitals, clinics, and other identified areas.

The 2023-2024 recommended budget includes the addition of eight positions consisting of six Social Workers, one Community Health Outreach Worker, and one Senior Office Assistant for the CITED expansion.

### WPC Navigation Teams

The Behavioral Health Navigation Team, focusing on engaging homeless individuals and those at risk of homelessness, is an active contributor to the Homeless Management Information System and the care coordination platform, Activate Care. Engagement occurs through outreach and in response to referrals from a variety of sources throughout the community, including the existing Behavioral Health Mobile Crisis Support Teams, shelters, encampments, and law enforcement.

# **4049600000—Whole Person Care Program**

## **Health Services**

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Multiple PHS programs coordinate with the WPC Team, BHS Navigation Team, and SJ Health Centers Team to provide each WPC client support via outreach, disease prevention and control, vaccinations, and COVID-19 response needs.

The WPC Program continues to receive referrals from the Sheriff's Office (SO) and Correctional Health Services (CHS), and coordinates to support the Pre-Release Medi-Cal Application mandate that became effective January 1, 2023. WPC is also partnering with SO and CHS to enhance discharge planning and care coordination at the time of booking with a streamlined process for enrollment in WPC for support and care coordination upon release from jail. In addition, WPC is collaborating with BHS and the County's Federally Qualified Health Centers on re-entry services and supporting law and justice system partners who are now able to divert certain individuals to recovery programs, the Assessment and Respite Center, and shelters.

### **Housing and Shelter Supports**

Homeless Mentally Ill Outreach and Treatment (HMIOT) funds continue to be used by the WPC Program to support the

direct housing needs of enrolled homeless mental health consumers. This effort includes a partnership with STAND and Dignity Health to purchase and rehabilitate homes in Stockton. Other WPC Program funds have been used to support facility and programming needs at GCRM for the benefit of WPC clients.

### **Office Relocation**

Due to WPC Program expansion, staff relocated to leased office space in Lathrop in August 2022, and is now co-located with Neighborhood Preservation and California Children's Services (A-22-44).

### **Fund Balance**

The Whole Person Care Special Revenue Fund (#20046) is the operating fund for WPC activities. Fund balance as of March 31, 2023, was \$2.1 million. The 2023-2024 budget includes \$340,465 in fund balance use for WPC activities during the continued transition to CalAIM.

# 4049700000—Office of the Medical Examiner

## Health Services

Greg Diederich, Health Care Services Director  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,975,302	\$2,627,009	\$2,875,437	\$2,875,437	\$248,428
Services & Supplies	2,729,548	3,088,872	3,008,303	3,008,303	(80,569)
Centrally-Budgeted Expenses	514,713	419,975	241,099	241,099	(178,876)
Capital Expenditures	81,718	170,000	150,000	150,000	(20,000)
Total Expenditures	\$5,301,281	\$6,305,856	\$6,274,839	\$6,274,839	(\$31,017)
Expenditure Reimbursements	(11,500)	0	0	0	0
Total Appropriations	\$5,289,781	\$6,305,856	\$6,274,839	\$6,274,839	(\$31,017)
<b>Earned Revenues By Source</b>					
Licenses/Permits/Franchises	\$16,964	\$15,000	\$15,000	\$15,000	\$0
Charges For Services	388,706	527,600	417,000	417,000	(110,600)
Miscellaneous Revenues	10,462	4,000	8,000	8,000	4,000
Total Revenues	\$416,132	\$546,600	\$440,000	\$440,000	(\$106,600)
<b>Net County Cost</b>	\$4,873,649	\$5,759,256	\$5,834,839	\$5,834,839	\$75,583
<b>Allocated Positions</b>	19.0	19.0	19.0	19.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	0.8	1.8	1.5	1.5	(0.3)
<b>Total Staffing</b>	19.8	20.8	20.5	20.5	(0.3)

## Purpose

The Office of the Medical Examiner (OME) is responsible for determining the circumstances, cause, and manner of all deaths falling under the jurisdiction of the OME, including sudden, unattended, unusual, violent, or accidental deaths. Field death investigations, postmortem examinations, and related forensic testing processes are used to establish a medical cause and manner of death.

The OME budget provides funding for the County's mandated responsibility to provide for disposition of indigent decedents. The Board of Supervisors' adopted policy of cremation, with exceptions only in certain limited cases, and the OME help contain costs by scrutinizing financial eligibility.

## Major Budget Changes

### Salaries & Employee Benefits

- \$254,459 Salary and benefits adjustments.
- (\$6,031) Decrease in extra-help.

### Services & Supplies

- \$218,926 Increase in autopsy services pricing.
- (\$135,000) Decrease in Sheriff's services.

- (\$85,000) Decrease in medical supplies.
- (\$40,000) Decrease in Health Care Services Administration allocated costs.
- (\$20,000) Eliminate budget for cremains removal project due to completion.
- (\$13,000) Decrease in tissue block processing.
- (\$11,850) Decrease in rent based on relocation of OME Office.

# 4049700000—Office of the Medical Examiner

## Health Services

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### Centrally-Budgeted Expenses

- \$126,043 Increase in Casualty insurance costs.
- \$12,072 Increase in data processing charges.
- (\$321,792) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$100,000 Case management software.
- \$50,000 Vehicle.

### Revenues

- (\$57,600) Decrease in body removal fee collections based on experience.
- (\$55,000) Decrease in investigation fee collections based on experience.

## Program Discussion

The 2023-2024 recommended budget for the Office of the Medical Examiner (OME) totals \$6,274,839, which is a decrease of \$31,017 from the 2022-2023 adjusted budget.

### Transition to Health Care Services Agency

On May 15, 2018, the Board adopted Ordinance No. 4507 establishing the OME as a separate division within the Health Care Services Agency (HCS). Following an extensive recruitment process, Dr. Michael Hunter was appointed the County's first Chief Medical Examiner for a four-year term, July 1, 2019 through June 30, 2023 (B-19-384). Chief Medical Examiner services are provided under a negotiated professional services agreement with Forensic Doctors Group, PC (A-19-208), which also includes the provision of pathology and autopsy services. HCS is working with Forensic Doctors Group, PC, on a new contract to begin effective July 1, 2023. An additional \$218,926 is included in the budget to reflect an anticipated increase in contractual rates.

The OME completed the operational transition from the prior Sheriff-Coroner model and began handling 100% of the County's death call volume in its jurisdiction as of January 3, 2022. The number of investigator-series positions in the OME allocation is now 12, equal to the investigation staffing levels recommended in the 2018 County Coroner Review and Audit Report from RAM Consulting LLC, which were based upon an historical average of 2,740 cases per calendar year.

In calendar year 2020, a total of 4,058 deaths were reported to the OME, which represents an increase of 48% over the prior 10-year average. In calendar year 2021, approximately 4,300 deaths were reported, an additional 7% increase from the prior year. In calendar year 2022 the number of OME cases declined to 3,380, closer to pre-pandemic levels.

The OME has struggled to fill its Medical Examiner Investigator positions. Recruiting for this classification and retaining staff has proven difficult, partially due to the Sheriff's Office background clearance process. As of March 2023, the vacancy rate stands at 33%. Upon improvement of the vacancy rate, the OME plans to review its allocated staffing levels for possible increases in relation to workload, which is not expected to return to 2018 levels.

### Facility Needs/Morgue Replacement Project

In late 2022, HCS office space became available for OME in Benton Hall when Whole Person Care staffing moved to newly leased space in Lathrop. OME staff relocated to four offices in Benton Hall in early 2023, following the previous move from the Sheriff's Office to San Joaquin General Hospital in 2021. This arrangement will allow for better coordination with funeral homes and will also allow for improved supervisory oversight of operations. The nearly 100-year-old morgue facility remains operational on grounds of the County Jail.

HCS and OME staff continue work with the General Services Department to finalize pre-construction planning for a morgue replacement facility and permanent office space for the OME. A solicitation for design services is anticipated by summer 2023, with construction to start fall of 2023. Occupancy is currently expected in early 2025. This new facility will allow the OME to hire staff independent of the Sheriff's Office background process.

### Case Management Software Project

During 2022-2023, the OME began work with the Purchasing and Support Services Division on a project to upgrade its current outdated case management software platform. Statistical inquiries will be greatly simplified with a new software system, making it more efficient and saving staff time when responding to public record requests. The budget includes \$100,000 for case management system software.

### Cremains Relocation Project

During 2018-2019, the Sheriff's Office Coroner Division began a project to remove 5,678 cremains stored in the morgue's columbarium to a permanent resting place in a public cemetery. Although delays associated with the COVID-19 pandemic placed the project on temporary hold, the OME completed the project in May 2022.

**4049700000—Office of the Medical Examiner**  
**Health Services**

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<b>Workload Data</b>					
	<b>2019-2020</b>	<b>Actual 2020-2021</b>	<b>2021-2022</b>	<b>Est./Act. 2022-2023</b>	<b>Projected 2023-2024</b>
<i>Cases Reported</i>	2,767	4,677	3,913	3,132	2,904
<i>Cases Certified</i>	818	1,353	994	963	942
<i>Postmortem Examinations</i>	701	699	673	669	665
<i>Indigent Cremations</i>	108	133	107	100	111

# 4049800000—County Support to PPH - FQHC

## Health Services

Farhan Fadoo, MD, Chief Executive Officer

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$18,050,614	\$23,365,255	\$26,698,550	\$26,698,550	\$3,333,295
Services & Supplies	7,993	13,100	15,089	15,089	1,989
Centrally-Budgeted Expenses	31,147	728,974	483,456	483,456	(245,518)
Total Expenditures	\$18,089,754	\$24,107,329	\$27,197,095	\$27,197,095	\$3,089,766
Expenditure Reimbursements	(18,089,754)	(24,107,329)	(27,197,095)	(27,197,095)	(3,089,766)
Total Appropriations	\$0	\$0	\$0	\$0	\$0
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	126.0	156.0	159.0	159.0	3.0
Temporary (Full-Time Equivalent)	51.4	46.5	42.0	42.0	(4.5)
Total Staffing	177.4	202.5	201.0	201.0	(1.5)

## Purpose

The County Support to Primary-Preventive Health Care – Federally-Qualified Health Center (PPH – FQHC) budget provides the required transfers of staffing, insurance, and expenses incurred from County service departments including Auditor-Controller, County Administrator, County Counsel, Information Systems Division, and Purchasing and Support Services to San Joaquin Health Centers (SJ Health), the operator of seven primary care clinics serving more than 30,000 patients annually through more than 130,000 patient visits to its campuses in French Camp, Manteca, and downtown Stockton.

## Major Budget Changes

### Salaries & Employee Benefits

- \$3,164,338 Salary and benefits adjustment.
- \$129,453 Add an Accountant III.
- \$218,250 Transfer a Department Information Systems Analyst IV from Hospital Enterprise Fund (#9221100000).
- \$176,398 Transfer a Business Analyst I-II from Hospital Enterprise Fund (#9221100000).
- \$452,258 Increase in overtime, reflecting experience.

➤ \$20,178 Increase in holiday pay.

➤ (\$827,580) Decrease in extra-help.

### Centrally-Budgeted Expenses

- \$97,684 Increase in data processing charges.
- (\$185,674) Decrease in Workers' Compensation and Casualty insurance costs.
- (\$157,528) Decrease in Medical Malpractice insurance costs.

### Expenditure Reimbursements

- \$3,089,766 Increase in reimbursement from SJ Health.

# **4049800000— County Support to PPH - FQHC**

## **Health Services**

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### **Program Discussion**

The 2023-2024 recommended budget for the County Support to Primary-Preventive Health Care-Federally Qualified Health Center (PPH-FQHC) totals \$27,197,095, which is an increase of \$3,089,766 from the 2022-2023 adjusted budget.

The County was designated an FQHC Look-Alike (LAL) by the Health Resources and Services Administration (HRSA) in 2014. To fulfill its duties as an FQHC-LAL the County partners with San Joaquin County Clinics (SJCC), a 501 (c)(3) corporation, with authorization from the Board of Supervisors (B-10-839).

The County and SJCC operate San Joaquin Health Centers (SJ Health) in accordance with the governance model laid forth in the Co-Applicant Agreement ratified by the Board in January 2021 (B-21-45). The name SJ Health was formally established by the Board of Supervisors on February 1, 2022 (R-22-31), subsequent to a rebranding strategy aligning over the overall strategic plan.

In 2021-2022, a new budget unit was established separate from the Hospital Enterprise Fund, in order to provide and account for staffing costs, centrally-budgeted insurance, Information Systems Division direct charges, and County Cost Allocation Plan charges. As costs are incurred, reimbursements are transferred to this budget from the San Joaquin County Clinics Fund. SJ Health's total operating budget is estimated at \$48.4 million for 2023-2024, \$27.2 million (56%) of which represents staffing and centrally budgeted costs paid through the County Support to PPH-FQHC budget.

SJ Health operates seven brick-and-mortar health centers and a mobile health center providing the following services: adult

and pediatric primary care, prenatal and women's health care, integrated behavioral health and substance use counseling, chronic disease management, and community health services.

During 2023-2024, SJ Health will develop plans for a new health center in northern San Joaquin County, based on estimates emerging from a 2022 community health needs assessment, indicating ongoing unmet needs in that service area. Federal funding has been secured for the project and implementation is expected to occur during 2023-2024. SJ Health will use existing positions to staff the new health center and may seek additional positions in subsequent budgets if volume scales higher than expected during the startup period. Initial plans for the health center include a novel service line offering of vision care services to health center patients.

SJ Health will continue and scale its work with health plan partners to deliver enhanced case management (ECM) services and community supports (CS) services to assigned members. Street medicine and care delivery through its mobile health center are also expected to continue and increase in reach throughout San Joaquin County.

### **Fund Balance**

#### **San Joaquin County Clinics Fund**

The San Joaquin County Clinics Trust Fund (#59001) is used as an operating account for SJ Health. Reimbursements to the County Support to PPH-FQHC budget are processed from this fund. Fund balance as of March 31, 2023, was \$10,746,378. The 2023-2024 recommended budget includes \$27,197,095 in reimbursements from this fund, based on fund balance and anticipated new revenue.

# 4040800000—Public Works-Utility Districts

## Health Services

Fritz Buchman, **Public Works Director**  
[www.sjgov.org/departments/pwk](http://www.sjgov.org/departments/pwk)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$2,670,788	\$2,787,199	\$3,090,020	\$3,090,020	\$302,821
Services & Supplies	472,316	1,247,756	1,347,305	1,347,305	99,549
Centrally-Budgeted Expenses	130,473	119,676	138,909	138,909	19,233
Capital Expenditures	104,952	20,000	60,000	60,000	40,000
Total Expenditures	\$3,378,529	\$4,174,631	\$4,636,234	\$4,636,234	\$461,603
Expenditure Reimbursements	(3,376,527)	(4,165,831)	(4,627,434)	(4,627,434)	(461,603)
Total Appropriations	\$2,002	\$8,800	\$8,800	\$8,800	\$0
<b>Earned Revenues By Source</b>					
Charges For Services	\$1,841	\$8,800	\$8,800	\$8,800	\$0
Miscellaneous Revenues	161	0	0	0	0
Total Revenues	\$2,002	\$8,800	\$8,800	\$8,800	\$0
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	24.0	24.0	24.0	24.0	0.0

## Purpose

The Utility Districts budget provides for the operation and maintenance of the various utility districts governed by the Board of Supervisors. This budget funds the staffing, services, and equipment needed to provide domestic water, sanitary sewer, and storm drain pumping services to the residents of these districts.

The Utility Maintenance Division operates and maintains 30 water systems with 52 wells; 3 sewage treatment plants; 9 pumping stations; and 68 storm drain pumping stations. These systems are spread throughout the 1,448 square miles of the County.

## Major Budget Changes

➤ \$10,000 Increase in equipment maintenance costs.

### Salaries & Employee Benefits

➤ (\$7,551) Decrease in fleet services costs.

➤ \$302,821 Salary and benefits adjustments.

### Centrally-Budgeted Expenses

➤ \$8,046 Increase in radio maintenance costs.

➤ \$6,698 Increase in Workers' Compensation and Casualty insurance costs.

### Services & Supplies

➤ \$40,000 Increase in water analysis costs for Special Districts.

➤ \$30,000 Increase in maintenance costs for Special Districts.

➤ \$21,000 Increase in chemical costs for Special Districts.

### Capital Expenditures - Equipment

➤ \$30,000 Six-inch diesel pump.

➤ \$10,000 Box trailer.



# 4040800000—Public Works-Utility Districts

## Health Services

- \$10,000 Flatbed trailer.
- \$10,000 Data collection and work order management system.

### Expenditure Reimbursements

- \$461,603 Increase in reimbursements from Special Districts.

## Program Discussion

The 2023-2024 recommended budget for Utility Districts totals \$4,636,234, which is an increase of \$461,603 from the 2022-2023 adjusted budget.

Drinking water supplies, wastewater collection and treatment, and storm drainage discharges must meet standards prescribed by local, State, and Federal regulatory agencies. Regulatory constraints on these services have increased significantly in recent years, and the trend is likely to continue. The combined effects of regulatory compliance, increasing energy costs, maintenance, and capital replacement needs, along with aging infrastructure and relatively small customer bases, all contribute to higher service costs.

Proposition 218, passed by voters in 1996, requires property owners' approval of new or increased property-related tax, assessment, or service charges. This has fundamentally changed how services are financed in Special Districts. Aging districts without necessary rate adjustments face financial hardships as well as service reductions. During 2023-2024, the Community Infrastructure Engineering Division, working in conjunction with the Utility Districts, will present rate adjustment recommendations to the Board of Supervisors for districts with additional funding needs.

The Division's mission is to provide safe, reliable, and economical water, sewer, and storm water services in a timely, environmentally-friendly, and fiscally-responsible manner. The objectives for 2023-2024, include the following efforts:

- Continue the development of processes to delineate the Division's procurement activities in a more transparent manner.
- Continue an emphasis on staff development.
- Continue to develop and incorporate emerging technologies into the Division's daily operations, such as year three of the five-year Supervisory Control and Data Acquisition plan (SCADA) and implementing an Asset Management/Work Order System, to increase efficiency and productivity.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Water</b>					
<i>Distribution Systems</i>	30	30	30	30	30
<i>Service Calls</i>	376	447	450	475	475
<i>Service Connections</i>	5,994	5,997	5,997	5,997	5,997
<i>Wells Operated</i>	52	52	52	52	52
<b>Sewer</b>					
<i>Collection Systems</i>	9	9	9	9	9
<i>Pumping Stations</i>	9	9	9	9	9
<i>Service Calls</i>	402	448	450	450	450
<i>Service Connections</i>	5,431	5,431	5,431	5,431	5,431
<i>Sewer Lines Cleaned (feet)</i>	380,000	450,000	500,000	500,000	500,000
<i>Treatment Plants</i>	3	3	3	3	3
<b>Drainage</b>					
<i>Pumps</i>	70	70	70	70	70

# Solid Waste Enterprise Fund

## Health Services

Fritz Buchman, **Public Works Director**  
[www.sjgov.org/department/pwk](http://www.sjgov.org/department/pwk)

Enterprise Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$10,097,741	\$10,882,557	\$12,891,796	\$12,891,796	\$2,009,239
Services & Supplies	22,735,378	26,587,790	28,641,081	28,641,081	2,053,291
Centrally-Budgeted Expenses	900,765	823,923	968,124	968,124	144,201
Other Charges & Uses	1,790,338	895	895	895	0
Capital Expenditures	1,735,570	3,323,400	3,583,002	3,583,002	259,602
Operating Transfers Out	160,000	180,000	180,000	180,000	0
<b>Total Expenditures</b>	<b>\$37,419,792</b>	<b>\$41,798,565</b>	<b>\$46,264,898</b>	<b>\$46,264,898</b>	<b>\$4,466,333</b>
Expenditure Reimbursements	(3,461,356)	(3,530,511)	(3,470,131)	(3,470,131)	60,380
<b>Total Appropriations</b>	<b>\$33,958,436</b>	<b>\$38,268,054</b>	<b>\$42,794,767</b>	<b>\$42,794,767</b>	<b>\$4,526,713</b>
<b>Earned Revenues By Source</b>					
Interest/Rents	\$98,863	\$97,000	\$429,000	\$429,000	\$332,000
Aid From Other Governments	269,724	658,000	305,066	305,066	(352,934)
Charges For Services	1,416,419	1,415,513	1,168,022	1,168,022	(247,491)
Miscellaneous Revenues	2,503,812	1,352,838	1,393,600	1,393,600	40,762
Solid Waste Special Revenues	38,054,479	39,194,863	38,959,049	38,959,049	(235,814)
Fund Balance	(8,384,861)	(4,450,160)	540,030	540,030	4,990,190
<b>Total Revenues</b>	<b>\$33,958,436</b>	<b>\$38,268,054</b>	<b>\$42,794,767</b>	<b>\$42,794,767</b>	<b>\$4,526,713</b>
<b>Net County Cost</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Allocated Positions</b>	<b>92.0</b>	<b>96.0</b>	<b>103.0</b>	<b>103.0</b>	<b>7.0</b>
<b>Temporary (Full-Time Equivalent)</b>	<b>8.0</b>	<b>9.1</b>	<b>9.6</b>	<b>9.6</b>	<b>0.5</b>
<b>Total Staffing</b>	<b>100.0</b>	<b>105.1</b>	<b>112.6</b>	<b>112.6</b>	<b>7.5</b>

## Purpose

The Solid Waste Enterprise Fund (#921000000) provides funding for the operation of the County's Solid Waste Management programs. These programs include long-range planning, operation of the County's solid waste transfer and disposal facilities, and acquisition, design, and development of landfill sites. It also includes refuse collection, franchise management, Countywide waste reduction activities, and the Countywide household hazardous waste program. More than 84% of this Fund's revenue is derived from tip fees charged based on disposal tons.

## Major Budget Changes

### Salaries & Employee Benefits

- \$1,018,833 Salary and benefits adjustments.
- \$306,037 Full-year cost of four positions added midyear 2022-2023: one Office Assistant Specialist, one Senior Solid Waste Recover Worker, and two Solid Waste Recover Workers.
- \$643,998 Add one Administrative Assistant II, one Welder, one Equipment Service Worker III, one Transfer Truck Driver, one Fleet Parts Specialist Trainee, and two Solid Waste Recovery Workers.
- \$64,473 Increase in extra-help.
- (\$24,102) Decrease in overtime and holiday pay.

# Solid Waste Enterprise Fund

## Health Services

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### Services & Supplies

- \$980,000 Increase in fleet services due to rise in diesel fuel costs.
- \$750,000 Increase in costs for compost and hazardous waste services.
- \$403,500 Increase in professional, engineering, and Sheriff services.
- \$280,500 Increase in professional consulting and engineering services for Foothill Landfill.
- \$238,000 Increase in credit card service charges.
- \$210,173 Increase in costs for tire disposal.
- \$136,521 Increase in allocated service department costs.
- \$100,000 Increase in special studies and reports for the SB 1383 compliance reporting.
- \$84,400 Increase in repairs, lube, and small tools.
- \$65,000 Increase in advertising costs.
- \$51,000 Increase in armored car services.
- \$44,500 Increase in utility costs.
- \$40,400 Increase in software, computer system, and communication related costs.
- \$28,100 Increase in special department expense and reallocated armored car costs.
- \$15,500 Increase in license and permit fees.
- \$15,320 Increase in memberships.
- \$12,875 Oil Payment Program Cycle Grant costs.
- (\$1,092,000) Decrease in diesel fuel charges.
- (\$120,000) Decrease in maintenance for structures and grounds.
- (\$79,980) Decrease in Assembly Bill (AB) 939 expenses.

- (\$54,000) Decrease in California Department of Resources, Recycling, and Recovery (CalRecycle) Grant costs.
- (\$13,000) Decrease in tires and tubes.

### Centrally-Budgeted Expenses

- \$133,546 Increase in Workers' Compensation and Casualty insurance costs.
- \$19,430 Increase in radio maintenance costs.
- \$11,800 Increase in rents and leases of automation equipment.
- (\$28,552) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$460,000 Fire protection upgrade for Lovelace Landfill.
- \$320,000 Refuse transfer trailers and a transfer demo trailer (3).
- \$200,002 Flare station components and collection equipment at Harney Lane, Foothill, North County, and Corral Hollow Landfills (11).
- \$80,000 Forklift for Lovelace Landfill.
- \$70,000 LED monitor for Lovelace Landfill.
- \$60,000 Diesel automated storm water pump for Lovelace Landfill.
- \$50,000 Camera and DVR system at Lovelace Landfill.
- \$40,000 Roll off bins at Lovelace and North County Landfills (4).
- \$36,000 Landfill tarps for Lovelace Landfill (3).
- \$20,000 Installation of oil collection infrastructure for used residential oil from Mokelumne Fire Department.

### Capital Expenditures – Structures and Improvements

- \$520,000 Rehabilitate and replace flare stations at North County and Corral Hollow Landfills (2).

# Solid Waste Enterprise Fund

## Health Services

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- \$480,000 Installation of new gas well, collection system, gas collection improvements, and replacement of monitoring well at North County Landfill (9).
- \$400,000 New landfill gas wells, and gas collection system improvements at Foothill Landfill (4).
- \$300,000 Rehabilitate and replace monitoring wells and a flare station at Harney Lane Landfill (2).
- \$282,000 Storm water pump, roll up doors, and exhaust fans replacement.
- \$165,000 Scale booth and refurbishment of current scale at Lovelace Landfill (2).
- \$100,000 Organics pad improvements at North County Landfill (1).

### Expenditure Reimbursements

- \$53,200 Increase in reimbursement from the Household Hazardous Waste Fund.
- (\$113,580) Decrease in AB 939 reimbursement.

### Revenues

- \$4,990,190 Increase in use of fund balance.
- \$332,000 Increase in interest income.
- \$59,000 Increase in sales from recycled materials.
- (\$352,934) Decrease in State grant revenue.
- (\$247,491) Decrease in charges for refuse collections.
- (\$122,234) Decrease in landfill gate fees.
- (\$113,580) Decrease in transfer from Solid Waste Special AB 939 fund.

## Program Discussion

The 2023-2024 recommended budget for the Solid Waste Enterprise Fund (SWEF) totals \$46,264,898, which is an increase of \$4,466,333 from the 2022-2023 adjusted budget.

The County-owned waste facilities experienced increases in waste volumes progressively over the last decade. This came after several years of decreased volumes during the prior recession. The growth was driven by an increase in waste streams from Manteca along with large increases in self-haul and commercial waste, driven by new construction, growth in the economy, and population increases. The Solid Waste Division projects that volumes will remain steady in 2023-2024 and are projected to steadily decrease in 2024-2025 and beyond, due to increased organics diversion requirement under State's Mandatory Commercial Organics Recycling (AB1826) and California's Short Lived Climate Pollutant Reduction Law (SB 1383). The focus continues on the maintenance of current operational levels, landfill post closure maintenance, and compliance with SB 1383 legislative requirements, which include a new organic processing facility and replacement of the Materials Recovery Facility and Transfer Station to occur sometime in 2026. The projected 2022-2023 year-end fund balance is \$29.9 million.

The Division continues to lead in regional solid waste planning for all jurisdictions in the County. In 2015, the County was successful in securing long-term waste disposal contracts with the cities of Manteca (through 2025), Ripon (ongoing), and Tracy (through 2035). The Division continues to maintain a contractual relationship for waste disposal with the city of Lodi, while maintaining informal arrangements with the cities of Escalon, Lathrop, and Stockton for incoming waste volumes at County facilities.

### *Organics Facility and New Economic Model*

Recently enacted SB 1383 requires the County to take substantial measures to lower greenhouse gas emissions through a variety of efforts including the diversion of organic materials from County landfills by 75% (from 2014 levels). Over the next 10 years, it is projected that the volume of organic waste diverted from landfills will increase steadily and dramatically. Accommodating this increase will require new infrastructure and processing methods.

SB 1383 requires the County to ensure appropriate waste collection service levels for residents and businesses, perform outreach and education to the public, track and monitor compliance, and report to the State periodically. Staff has embarked on education and outreach efforts through a direct mailer, creation of a webpage, and presentations to the community. Once waste collection contracts are negotiated to address SB 1383 mandates, a comprehensive education and outreach campaign targeting residents will continue under a County and Collector partnership, based upon the relevant collection systems and rules that will be in place in the resident's neighborhood.

Other County departments are affected by this legislation and have deliverables as well, ranging from the purchase of

# **Solid Waste Enterprise Fund**

## **Health Services**

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recycled content products and the procurement of post-processed organic products, to edible food programs that benefit the community. A needs assessment is currently being conducted to reveal how this legislation will impact solid waste operations. A new fund and additional revenue sources will be established due to projected loss in gate fee revenues from decreased volumes and to offset costs incurred under this mandate. Additional staffing has been added to ensure that all new requirements are satisfied.

### ***Waste Diversion Planning***

Waste Diversion Planning continues to face challenges as the California Department of Resources Recycling and Recovery (CalRecycle) redefines waste diversion goals. Markets for recyclable materials are currently depressed and increases in organic materials diverted from the landfill are mandated with limited processing facilities. CalRecycle is taking an active role to ensure all jurisdictions meet complex new goals and the County is initiating efforts to provide outreach and education to the public on new waste diversion practices.

The County will maintain its leadership position for jurisdictions in waste diversion efforts focusing on Waste Diversion Programs; Community Outreach and Education; Regulatory and Compliance Efforts; and Administration and Reporting.

### ***Module Construction***

The construction of a new landfill module at North County Landfill began in May 2022 and was completed on October 2022 with a total expansion cost of \$5.2 million. The planned construction involved the installation of a landfill liner, leachate collection and monitoring systems, and storm water

drainage. The next new module construction is scheduled to begin in 2024-2025 at the Foothill Landfill site unless waste volumes increase dramatically.

### ***Landfill Gas to Energy***

The Division is working to convert excess landfill gas to a productive use at North County Landfill. A Request for Proposal was completed in 2022-2023. The selected project will have the benefits of reducing the emission of greenhouse gases into the atmosphere and generating additional resources with a revenue sharing program similar to Foothill Landfill.

## **Fund Balance**

### ***Closure Enterprise Fund***

The Solid Waste Closure Enterprise Fund (SWCEF) (#39033) is maintained for the exclusive purpose of accumulating and distributing funds for closure of presently active (North County and Foothill) landfills. An enterprise fund is one of several approved mechanisms by which the County can demonstrate financial assurance for closure, as required by State regulations. Monies placed in the SWCEF may only be used for closure of landfills.

Prior to 2009-2010, monies were transferred from the SWEF into the SWCEF to provide funding for future closures of the Foothill and North County Landfills. Evaluation of SWCEF requirements and balances indicated a transfer was needed from the SWEF into the SWCEF beginning in 2021-2022. For 2023-2024, the transfer is estimated to be \$180,000. Interest earned is directly deposited into the SWEF. Fund balance as of March 31, 2023, was \$5,431,008.

# Solid Waste Enterprise Fund

## Health Services

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Waste Received (Tons)</b>					
<i>Foothill Landfill</i>	161,907	169,199	176,603	169,949	169,981
<i>Lovelace Transfer Station</i>	227,201	256,171	268,285	271,915	273,718
<i>North County Landfill</i>	172,172	188,377	202,005	195,853	205,270
<b>Total Tons Received</b>	<b>561,280</b>	<b>613,747</b>	<b>646,893</b>	<b>637,717</b>	<b>648,969</b>
<b>Transfers-Lovelace</b>					
<i>Tons Transferred</i>	211,084	231,205	249,055	238,061	237,623
<i>Number of Loads</i>	11,207	11,207	11,207	11,703	10,512
<b>Recycled Materials (Tons)</b>					
<i>Foothill Landfill</i>	1,934	3,423	3,900	4,228	4,215
<i>Lovelace Transfer Station</i>	4,102	4,102	4,102	4,443	3,991
<i>North County Landfill</i>	13,608	13,122	14,564	17,650	17,540
<b>Total Tons Diverted</b>	<b>19,644</b>	<b>20,647</b>	<b>22,566</b>	<b>26,321</b>	<b>25,746</b>
<i>Groundwater Monitoring Samples*</i>	77	75	75	75	N/A
<i>Landfill Gas Collection Wells Adjusted</i>	194	215	215	215	N/A
<i>Landfill Gas Flare Stations Maintained</i>	4	4	4	4	N/A
<i>Perimeter Landfill Gas Monitoring</i>	197	200	200	200	N/A
<i>Soil Gas Volatile Organic Comp. Samples</i>	64	64	64	64	N/A
<i>Discharge Permit Requirements</i>	4	1	1	1	N/A
*Data will no longer be tracked after 2022-2023. Monitoring will be performed by consultants.					

# CSA 31 Sewer Enterprise Fund

## Health Services

Fritz Buchman, Public Works Director

[www.sjgov.org/department/pwk](http://www.sjgov.org/department/pwk)

Enterprise Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$139,407	\$354,104	\$371,604	\$371,604	\$17,500
Centrally-Budgeted Expenses	0	11,369	12,664	12,664	1,295
Other Charges & Uses	755,559	805,020	822,020	822,020	17,000
Operating Transfers Out	100,000	100,000	100,000	100,000	0
Total Appropriations	\$994,966	\$1,270,493	\$1,306,288	\$1,306,288	\$35,795
<b>Earned Revenues By Source</b>					
Interest/Rents	\$4,108	\$4,500	\$13,650	\$13,650	\$9,150
Charges For Services	1,325,281	1,241,460	1,259,390	1,259,390	17,930
Fund Balance	(334,423)	24,533	33,248	33,248	8,715
Total Revenues	\$994,966	\$1,270,493	\$1,306,288	\$1,306,288	\$35,795
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

The County Service Area 31 (CSA 31) Sewer Enterprise Fund (SEWF) (#9312000000) provides funding for the operation and maintenance of the district's wastewater system. The system consists of a collection system and a pump station, which discharges wastewater to the City of Lodi's White Slough Water Pollution Control Facility. Revenue is derived primarily from service charges levied on the benefiting properties.

In February 2018, \$7.8 million in Revenue Refunding Bonds was issued to refinance the Series 2007 CSA 31 Wastewater Project Certificates of Participation and the 2007 County General Fund loan to CSA 31 that funded the construction of wastewater system improvements. These refunding bonds are secured by the District's revenue from wastewater service charges.

## Major Budget Changes

### Services & Supplies

- \$12,000 Increase in professional services for engineers.
- \$5,000 Increase in administrative charges.

### Other Charges & Uses

- \$22,000 Increase in City of Lodi sewer surcharge and treatment fees.
- (\$5,000) Decrease in long-term debt expenses.

### Revenues

- \$17,930 Increase in service fee charges.
- \$9,150 Increase in interest income.
- \$8,715 Increase in the use of fund balance.

## Program Discussion

The 2023-2024 recommended budget for County Service Area 31 (CSA 31) Sewer Enterprise Fund totals \$1,306,288, which is an increase of \$35,795 from the 2022-2023 adjusted budget.

Wastewater service charges are based on the Equivalent Unit (EU), which equals 310,250 gallons of discharge. The minimum charge for service is 0.5 EU for developed lots and 0.3 EU for undeveloped lots. Revenue from service charges is

CSA 31 Sewer Enterprise Fund

Health Services

projected to increase approximately 1.4% in 2023-2024, due to increased water consumption observed during the past fiscal year.

Fund Balance

CSA 31 Sewer Enterprise Fund

As of March 31, 2023, the CSA 31 Sewer Enterprise Fund (#39312) had a balance of \$1,594,880. The 2023-2024 recommended budget includes revenue of \$1.3 million from service charges paid by customers and the use of \$33,248 in fund balance.

Sewer Rate Stabilization Fund (RSF)

As of March 31, 2023, the CSA Sewer Rate Stabilization Enterprise Fund (#39315) had a balance of \$408,431. Planned expenditures include a \$100,000 contribution to the RSF. This fund was created to meet provisions of the bond indenture and provide contingency for fluctuations in revenues resulting from changes in wastewater discharge by system users. As long as no Event of Default has occurred and the County is in compliance with the provisions of the indenture, the County may deposit revenue as the County deems appropriate into the RSF.

Workload Data					
	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Equivalent Units (EU)					
<i>EUs for developed lots</i>					
<i>Minimum Charge for Services = 0.5 EU</i>	110.3	102.3	102.3	109.3	110.9
<i>EUs for undeveloped lots</i>					
<i>Minimum Charge for Services = 0.3 EU</i>	4.5	4.2	3.6	3.6	3.6
<b>Total</b>	<b>114.8</b>	<b>106.5</b>	<b>105.9</b>	<b>112.9</b>	<b>114.5</b>



# 4042000000—Environmental Health

## Health Services

Jasjit Kang, Environmental Health Director  
[www.sjgov.org/departments/envhealth](http://www.sjgov.org/departments/envhealth)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$7,996,243	\$8,602,210	\$8,805,334	\$8,805,334	\$203,124
Services & Supplies	744,536	1,052,152	961,878	961,878	(90,274)
Centrally-Budgeted Expenses	1,039,616	978,805	1,471,667	1,471,667	492,862
Total Expenditures	\$9,780,395	\$10,633,167	\$11,238,879	\$11,238,879	\$605,712
Expenditure Reimbursements	(237,497)	(231,161)	(194,166)	(194,166)	36,995
Total Appropriations	\$9,542,898	\$10,402,006	\$11,044,713	\$11,044,713	\$642,707
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$205,565	\$175,458	\$26,400	\$26,400	(\$149,058)
Charges For Services	7,315,934	8,113,849	8,299,642	8,299,642	185,793
Miscellaneous Revenues	124,358	274,240	195,200	195,200	(79,040)
Operating Transfers In	0	0	222,000	222,000	222,000
Total Revenues	\$7,645,857	\$8,563,547	\$8,743,242	\$8,743,242	\$179,695
<b>Net County Cost</b>	\$1,897,041	\$1,838,459	\$2,301,471	\$2,301,471	\$463,012
<b>Allocated Positions</b>	65.0	64.0	59.0	59.0	(5.0)

## Purpose

The Environmental Health Department (EHD) provides services that protect and enhance public health, wellbeing, and safety through prevention, education, inspection, and enforcement of State and local environmental laws and regulations.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Decrease vacancy rate by collaborating with environmental health organizations and educational institutions for potential candidates.	6.25%	3.12%	June 2024
➤ Increase retention using exit surveys to identify areas of improvement.	88%	90%	June 2024
	90%	93%	June 2025

# 4042000000—Environmental Health

## Health Services

Augment Digitization and Automation	Current	Target	Deadline
➤ Utilize software allowing electronic application capability, paperless inspections, and electronic recordkeeping.	80%	90%	June 2024
	90%	100%	June 2025
<b>Fiscal Optimization</b>			
Maintain a Structurally Balanced Budget	Current	Target	Deadline
➤ Continuous monitoring of revenue and expenditures to minimize General Fund dependence by ensuring fees are in line with services provided.	Net County Cost Target 20%	Net County Cost Target 18%	June 2024
	18%	15%	June 2025
<b>Water Management</b>			
Enhance Water Quality	Current	Target	Deadline
➤ Regulate domestic and agricultural wells drilled in the County. Enhance regulating by decreasing time taken for the permit approval process.	80%	85%	June 2023
	85%	90%	June 2024
	90%	95%	June 2025
<b>Economic Development</b>			
Expand Small Business Growth	Current	Target	Deadline
➤ Decrease compliance violations through education and outreach.	60%*	65%	June 2023
	65%	70%	June 2024
	70%	75%	June 2025

\*Provide education information electronically with annual invoice.

## Major Budget Changes

### Salaries & Employee Benefits

- \$757,076 Salary and benefits adjustments.
- (\$560,715) Delete four Lead Senior Regulation Environmental Health Specialists and one Senior Office Assistant.
- \$6,763 Increase in overtime.

### Services & Supplies

- \$79,500 Increase in professional services for milk and watering sampling.

- \$14,443 Increase in fleet services costs.
- \$10,750 Increase in utilities charges.
- (\$201,784) Decrease in software and related licenses.

### Centrally-Budgeted Expenses

- \$196,774 Increase in data processing charges.
- \$181,358 Increase in Workers' Compensation and Casualty insurance costs.
- \$24,463 Increase in radio maintenance costs.
- \$90,252 Cost Allocation Plan adjustment.

# 4042000000—Environmental Health

## Health Services

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### Expenditure Reimbursements

- (\$36,995) Decrease in Lead Program reimbursement.

### Revenues

- \$185,793 Increase in annual permit and service request fees.
- (\$149,058) Decrease in Small Public Water System grant funds.
- (\$79,040) Decrease in reimbursement from Environmental Health General Fund Special Account.

### Operating Transfers In

- \$222,000 Increase in transfers from American Rescue Plan Act (ARPA) for illegal dumping cleanup costs and reimbursements from the technology recovery fund.

## Program Discussion

The 2023-2024 recommended budget for the Environmental Health Department (EHD) totals \$11,238,879, which is an increase of \$605,712 from the 2022-2023 adjusted budget.

### Retail Food Program

EHD conducts routine, complaint, and plan review inspections to ensure that mandated food safety controls are in place to protect the public from foodborne illness exposure. In addition, educational materials and workshops are provided to food operators and businesses, including non-profit organizations.

In 2022-2023, new food-related legislation was passed including a new Senate Bill (SB) and the implementation of a current SB:

- **SB 972 California Retail Food Code** – Effective January 1, 2023, the California Retail Food Code added new food facilities defined as Compact Mobile Food Operations (CMFOs). These are defined as a non-motorized push-cart, stand, rack, or display with or without wheels, pedal-driven cart, wagon, or showcase that must report to a commissary for daily cleaning and storage. The bill eases permitting requirements by allowing counties to approve a food cart design that meets safety requirements, in lieu of approving individually manufactured carts.
- **SB 1383 Short-Lived Climate Pollutant Reduction Law** – Although passed in 2016,

implementation of the edible food component of this bill was not effective until January 1, 2023. To achieve methane gas reduction targets by reducing emissions of short-lived climate pollutants, designated food facilities are required to recover and donate at least 20% of edible food that would otherwise be diverted to landfills. EHD will continue to monitor commercial edible food generators through outreach and inspections to ensuring the facilities remain in compliance.

### Homelessness

In April 2019, the Board adopted an Encampment Management and Resolution Policy (B-19-262) as part of a larger strategy to address the growing encampments of unsheltered residents on County property in unincorporated areas. As part of the Encampment Response Team (ERT), EHD staff assist with determining the appropriate action and response to be taken to mitigate any health and safety risks to unsheltered residents, neighbors, or other community members. There were 15 homelessness related complaints between January 1, 2022 and December 1, 2022. EHD actively participates in the Weekly Strike Team Meetings with California Department of Transportation (Caltrans), California Highway Patrol (CHP), City of Stockton, the Sheriff's Office, City of Stockton Police Department, Central Valley Regional Flood Control Board, Public Works, Behavioral Health, and Public Health to collaboratively combat homelessness issues. EHD continues to track time spent when ERT activities occur.

### Certified Unified Program Agency (CUPA) Programs

EHD is responsible for implementing CUPA programs related to hazardous materials and hazardous waste management. These programs include Aboveground and Underground Storage Tanks (UST), California Accidental Release Prevention, Hazardous Waste, and Hazardous Material Business Plan.

The CUPA Program recently participated in a State Review Framework (SRF) evaluation conducted by the United States Environmental Protection Agency. The SRF evaluation is a nationally consistent process used for reviewing the performance of state-delegated compliance and enforcement programs. As a result of the evaluation, the Program was noted for implementing high level hazardous waste inspection reports that are complete, consistent, and provide appropriate documentation to determine compliance at a facility. The Program also received satisfactory program reviews for meeting the intent of the law in implementation and enforcement of all Unified Program elements. Additionally, EHD effectively manages non-compliant facilities with appropriate enforcement responses.

# **4042000000—Environmental Health**

## **Health Services**

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The UST Program has seen significant growth in recent years. Currently, there are 11 new gasoline service stations in the process of being constructed in the County, with an additional 10 stations in the permit review phase to be installed in the near future. EHD is working closely with Human Resources to recruit and retain Registered Environmental Health Specialists to administer this complex program.

### **Liquid Waste Program**

EHD maintains a water quality assessment program to determine the general operation status of Onsite Wastewater Treatments Systems (OWTS), to evaluate the impact of OWTS discharges, and to assess the extent to which groundwater and local surface water quality may be adversely impacted. Successful management of this program has somewhat impacted staff workload, but will continue to be monitored to ensure current fees support additional costs.

### **Well Program**

EHD issues well permits and conducts inspections for well construction, well destruction, and geotechnical borings to prevent groundwater contamination and safety hazards. Maintaining an appropriate level of workforce in this program can be challenging due to the frequent changes in workload demands.

On March 28, 2022, the Drought Executive Order N-7-22 was issued by Governor Newsom to protect the health, safety, and the environment during the drought emergency. The order included new well permitting requirements for local agencies to prepare for and lessen the effects of drought conditions. Prior to the issuance of a permit for a new groundwater well, or alteration of an existing well, it must be determined the proposed well is not likely to interfere with the production and function of existing nearby wells and not likely to adversely impact or damage nearby infrastructure. EHD has contracted with a hydrologist to develop and streamline the method of well permitting to meet these strict standards. EHD is receiving positive feedback regarding the new process; however, staff time required for approving each well application permit has significantly increased. EHD will monitor and review appropriate fees to accommodate this new process.

In collaboration with the Office of Emergency Services, EHD has extended the services of Self-Help Enterprises (SHE) to help augment the drought response in the County. SHE has currently provided water tanks and bottled water to more than 36 County residences that have experienced a dry well.

### **Solid Waste Program**

EHD is certified as a Local Enforcement Agency (LEA) by CalRecycle to implement the elements of solid waste codes and regulations. EHD's current evaluation from CalRecycle notes the professionalism of EHD staff and acknowledges EHD has implemented a program that meets LEA responsibilities.

SB 1383, California Short-Lived Climate Pollutant Reduction Law, establishes methane reduction targets that sets goals to reduce disposal of organic waste in landfills, including edible food. EHD staff is working in collaboration with the Public Works Solid Waste Division, in developing a strategic plan for County Solid Waste Facilities by increasing recycling of organic waste materials through composting and in-vessel digestion equipment. Other agencies in the County are considering implementing composting facilities, anaerobic digestors, food separators, or processing dedicated food waste to generate compressed natural gas to further the implementation of SB1383.

### **Small Public Water System (SPWS) Program**

The SPWS Program has been performed by EHD as the Local Primacy Agency (LPA) under delegation from the California State Water Resources Control Board (CSWRCB), Division of Drinking Water since the 1970s. San Joaquin County is the second largest LPA in the State, regulating 283 public water systems and 30 State small water systems. Almost 25% of these water systems are in disadvantaged communities and many cannot afford to pay the fee increases needed for the department to reach full cost recovery. As an interim measure, the SPWS grant originally received from the State in 2014 has been utilized to offset the revenue shortage. The last of the grant funds were used in 2022-2023 to offset the funding gap. Adequate funding for the SPWS program is an issue for most LPA counties. Local jurisdiction access to information and regulations is crucial in providing timely and effective support for the delivery of safe and healthy drinking water to all SPWS communities. If additional State funding is not provided, the SPWS program will need to either increase fees considerably, subsidize the program from the General Fund, or return the program to CSWRCB for operation.

### **Facility and Technology Needs**

EHD is collaborating with the Information System Division in implementing a replacement database to fit the needs of the department. Accela, Inc., is providing the new database for EHD and four other County departments. Transitioning to the new database is occurring in stages and will be fully implemented by July 2023.

# **4042000000—Environmental Health**

## **Health Services**

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### *Fee Adjustments*

As part of the budget process with the Board's policy objective of full cost recovery as a target, EHD is implementing the practice of continuous monitoring of revenue and expenditures to minimize General Fund dependence. EHD is challenged with the task of providing mandated services to the regulated community without charging fees that may have a sudden adverse impact on the businesses. Fees were evaluated during 2022-2023 and an estimated \$338,000 in additional revenue is anticipated. For 2023-2024, using an established methodology, fee increases will again be proposed to the Board of Supervisors for consideration reflecting increases in the EHD hourly rate and several specific program fees. If approved, the fee proposal increases will generate approximately \$185,793 to help close the gap between current program costs and Net County Cost contributions. Most program fee for service increases of 3.7% reflect the proposed hourly rate increase.

In 2023-2024, EHD is proposing a new Technology Recovery Fee that is estimated to generate \$172,000 that will assist with the cost of providing electronic applications, paperless inspections, and electronic recordkeeping.

### **Fund Balances**

#### **Solid Waste Management Fund**

The Solid Waste Management General Fund Special Account (#13423) maintains reserves required to fund the continued inspection, monitoring, and oversight of inactive, closed disposal facilities. Fund balance as of March 31, 2023, was \$3,222,202. The 2023-2024 recommended budget includes an estimated \$750,000 in transfers to reimburse eligible costs.

#### **Environmental Health Fund**

The Environmental Health General Fund Special Account (#13424) is used to reimburse costs of compliance training for business and agricultural communities; inspection, response, and enforcement activities; and equipment and resources relating to hazardous materials and hazardous waste programs. Fund revenue is derived from local and Statewide enforcement case fines and penalties. Fund balance as of March 31, 2023, was \$2,368,330. The 2023-2024 budget includes \$195,200 in transfers from the Environmental Health General Fund Special Account to reimburse eligible costs.

### **Supplemental Request**

EHD is requesting \$150,559 in supplemental funding to continue the Small Public Water System program during 2023-2024. The State has established stringent requirements for monitoring inspections, water sampling, data collection, and enforcement for the water systems in the community, but has discontinued funding for this program. EHD will conduct a thorough permit fee review in the upcoming months to determine if increasing fees for full cost recovery to maintain this program is feasible for these water systems. The supplemental funding request will be ongoing if full cost recovery does not appear to be imminent and the program remains in County purview. The program may be returned to the State for monitoring if permanent funding sources cannot be established.

The recommended budget has been augmented by \$150,559 to address this request.

# 4042000000—Environmental Health

## Health Services

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Consumer Protection</b>					
<i>Retail Food</i>	4,448	4,540	4,167	4,808	4,810
<i>Small Public Water Systems</i>	121	135	156	136	100
<i>Public Pools/Spas/Beaches</i>	657	662	773	634	710
<i>Dairy Facilities-Milk for Market</i>	559	560	332	322	330
<b>Hazardous Substances Management</b>					
<i>Hazardous Materials Business Plan/CalARP</i>	789	980	706	722	710
<i>Hazardous Waste Generators/ Tiered Permitting</i>	699	826	423	350	390
<i>Aboveground Tank Facilities</i>	250	250	63	65	75
<i>Underground Storage Facilities</i>	347	352	444	288	350
<i>Emergency Response Incidents</i>	250	250	218	212	220
<b>Housing Programs</b>					
<i>Substandard Housing Abatement Complaints/Enforcement Cases</i>	1,014	1,040	N/A	N/A	N/A
<i>Lead, Empl. Housing, Vectors, Jails</i>	162	148	112	52	67
<i>Homelessness Prevention</i>	180	200	88	26	90
<b>Land-Use &amp; Liquid Waste</b>					
<i>Land-Use Applications &amp; Technical Reports</i>	915	901	964	750	750
<i>Onsite Wastewater Permit/ Facilities/Septage Pumper</i>	615	670	885	916	920
<b>Solid Waste</b>					
<i>Solid Waste Facilities-Active and Closed</i>	356	372	327	332	320
<i>Medical Waste Facilities</i>	52	52	52	52	53
<b>Groundwater Protection</b>					
<i>Site Mitigation/Monitoring Well Permits</i>	290	380	225	210	90
<i>Well &amp; Pump Permits</i>	1,114	1,010	1,073	1,328	1,340
<b>Total Permits/Facility Inventory</b>	<b>12,818</b>	<b>13,328</b>	<b>11,008</b>	<b>11,203</b>	<b>11,325</b>
<b>Staff Hours</b>	66,810	70,401	65,776	73,408	73,660

# 4049100000—Children & Families Program (First 5)

## Health Services

Chris Woods, Human Services Director  
[www.sjckids.org/](http://www.sjckids.org/)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,759,908	\$1,852,831	\$1,917,311	\$1,917,311	\$64,480
Services & Supplies	173,827	206,358	231,306	231,306	24,948
Centrally-Budgeted Expenses	9	45,019	77,530	77,530	32,511
Total Expenditures	\$1,933,744	\$2,104,208	\$2,226,147	\$2,226,147	\$121,939
Expenditure Reimbursements	(11,000)	0	(360,065)	(360,065)	(360,065)
Total Appropriations	\$1,922,744	\$2,104,208	\$1,866,082	\$1,866,082	(\$238,126)
<b>Earned Revenues By Source</b>					
Operating Transfers In	\$1,372,680	\$2,104,208	\$1,866,082	\$1,866,082	(\$238,126)
Total Revenues	\$1,372,680	\$2,104,208	\$1,866,082	\$1,866,082	(\$238,126)
<b>Net County Cost</b>	\$550,064	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	13.0	13.0	12.0	12.0	(1.0)

## Purpose

The Children and Families Act of 1998 (Proposition 10) created the San Joaquin County Children and Families Program (First 5 San Joaquin) for “promoting, supporting, and improving the early development of children from the prenatal stage to five years of age.”

Excise taxes, collected by the State, on tobacco products are the primary sources of funding for the Program. San Joaquin County receives approximately \$5.65 million annually into the County’s First 5 San Joaquin Special Revenue Fund (#20491) that was established in 1999. First 5 San Joaquin must spend these funds according to the strategic plan prepared by the Children and Families Commission (Commission), and they are contained in a separate budget not governed by the Board of Supervisors. The Board appoints members of the Commission. The 2023-2024 budget for First 5 San Joaquin Children and Families Commission totals \$17.8 million.

This budget (#4049100000) funds staffing and administrative support only. The Special Revenue Fund (#20491) fully reimburses these costs.

## Major Budget Changes

### Salaries & Employee Benefits

- \$203,751 Salary and benefits adjustments.
- (\$139,271) Delete a Contracts Analyst.

### Services & Supplies

- \$24,678 Increase in professional services for temporary fiscal support.

### Centrally-Budgeted Expenses

- \$28,815 Cost Allocation Plan adjustment.

### Expenditure Reimbursements

- \$360,065 Increase in reimbursement from CalWORKs.

### Operating Transfers In

- (\$238,126) Decrease in funding from First 5 San Joaquin Special Revenue Fund.



# 4049100000—Children & Families Program (First 5)

## Health Services

### Program Discussion

The 2023-2024 recommended budget for the San Joaquin County Children and Families Program (First 5 San Joaquin) totals \$2,226,147, which is an increase of \$121,939 from the 2022-2023 adjusted budget.

#### American Rescue Plan Act (ARPA)

The Board allocated ARPA funds to First 5 San Joaquin on two separate occasions. These funds will serve children ages 0 to 5 and their adult caretakers. They will also address the long-term negative effects of the COVID-19 pandemic and support continued service delivery.

On September 14, 2021, the Board approved \$4,163,465 in ARPA funds to support and expand First 5 San Joaquin programs through June 30, 2023 (B-21-537). The Board approved an additional \$2.45 million in ARPA funds on October 4, 2022, to support the continued expansion of programs through June 30, 2024 (B-22-695).

First 5 San Joaquin will use its most recent allocation of \$2.45 million, along with \$1,173,347 in unspent ARPA funds from 2021-2022 and 2022-2023, to address the needs of children ages 0 to 5 and those who care for them. A portion of these funds (\$178,869) will support program administration, reporting, and evaluation. The balance will assist the following initiatives:

- **San Joaquin Treatment and Education for Everyone on Teeth and Health (SJ TEETH)** – \$618,070 for oral health care coordination.
- **Help Me Grow** – \$440,000 for developmental support.
- **Raising Quality!** – \$977,911 for home visitation and support to grandparents, families, friends, and neighbors of children ages 0 to 5.
- **Home Visiting** – \$1,195,888 to expand the program and support infrastructure improvements. An additional \$158,509 will fund the professional development of the program's workforce.
- **Parent Engagement** – \$54,100 to provide services designed to improve the function of families.

#### Improve and Maximize Programs so All Children Thrive 2020 (IMPACT 2020)

First 5 San Joaquin received IMPACT 2020 funding of \$1.5 million, which was awarded from First 5 California for 2020-2023 to address child care quality issues in the community. The First 5 San Joaquin IMPACT 2020 Family, Friend, and Neighbor (FFN) program is intended to fund

license-exempt providers, family childcare providers, and private childcare centers not receiving Federal or State funding. First 5 San Joaquin plans to use \$977,911 of ARPA funds in 2023-2024 to continue the work of IMPACT 2020 FFN programs. It is anticipated the program will serve 390 sites in 2023-2024, with emphasis on serving the African-American, Hispanic, and Southeast Asian communities' grandparents caring for their grandchildren.

#### San Joaquin Treatment and Education for Everyone on Teeth and Health (SJ TEETH)

First 5 San Joaquin started SJ TEETH in 2017 after being awarded funds by the Department of Health Care Services (DHCS) under the Statewide Local Dental Pilot Program (LDPP), which totaled \$5.0 million for the period of January 2021 through December 2021. SJ TEETH coordinated and collaborated with agencies to engage in activities to improve access to oral health care for children, including the implementation of a school-based Virtual Dental Home service.

The LDPP ended on December 31, 2021. In 2021-2022, this program used \$552,376 from the Contingency Provision budget (#1019000000) to provide care coordination for 1,061 children. First 5 San Joaquin plans to use \$633,070 of its allocated ARPA funds to replace the LDPP funds that are no longer available, and support dental care coordination services through June 30, 2024.

#### First 5 San Joaquin Strategic Plan 2022-2027

The First 5 San Joaquin Strategic Plan 2022-2027 (Plan) and the 2023-2024 budget assume Proposition 10 revenue will continue to decline over time due to decreasing smoking rates and declining birth rates in California. The Plan was created with an emphasis on determining the role of First 5 San Joaquin post-COVID-19 pandemic. The Commission adopted the Plan on December 2, 2021, and reviews it annually. Additionally, the Ten-Year Plan is updated annually to reflect current and future priority spending trends. With revenues declining in most years, the Plan prioritizes leveraging new and existing resources.

For 2023-2024, 64% of programs administered are not funded by local Proposition 10 and come from other funding sources:

Source	2023-2024
California Department of Social Services (CDSS)	\$6,358,574
American Rescue Act Plan (ARPA)	\$2,450,000
CalWORKs Substance Abuse	\$376,406
CalWORKs Mental Health	\$250,938
CalWORKs Child Abuse Prevention	\$200,000



# 4049100000—Children & Families Program (First 5)

## Health Services

Source	2023-2024
CalWORKs Family Stabilization Funding	\$133,000
San Joaquin County Public Health Services - Proposition 56	\$16,000

Projects to be funded in this manner include:

### FamilyWORKs

The CDSS-funded Home Visiting Program (HVP) promotes self-sufficiency and uses health education and the Parents as Teachers curriculum to encourage literacy, financial planning, and increased work participation rates for CalWORKs families. First 5 San Joaquin expects HVP, known locally as FamilyWORKs, to serve 400 families in 2023-2024, with \$3.1 million in funding. This will offset First 5 San Joaquin's salary, benefits, and administrative costs by approximately \$188,572.

### JourneyWORKs

The JourneyWORKs CalWORKs Substance Abuse and Mental Health funded program provides care coordination and home visitation services to CalWORKs recipients who are pregnant and/or caring for a child under the age of five and have substance abuse or mental health concerns. Additional services support these families with care coordination related to substance use assessments, outpatient and inpatient services, as well as withdrawal management and opiate substitution therapies.

JourneyWORKs can serve up to 136 families. This program provides funding in 2023-2024 in the amount of \$627,344 and will offset First 5 San Joaquin's salary and benefits, and administrative costs of approximately \$34,289.

### HousingWORKs

CalWORKs CDSS-funded Housing Support Program (HSP) provides homeless CalWORKs families with housing navigation and case management services. HSP, known locally as HousingWORKs, is coordinated for HSA by First 5 San Joaquin, and began in December 2019.

In 2023-2024, this program will receive \$3,236,661 in funding to offset First 5 San Joaquin salary, benefits, and administrative costs of approximately \$124,694.

### Ongoing Evaluation of Program Requirements

The Commission has established a structure to evaluate funded programs and services in order to comply with Proposition 10 and ensure accountability. First 5 San Joaquin created customized databases for each Commission-funded program or service to capture outcomes. These databases will continue to be used in 2023-2024.

### Strategic Partnerships

First 5 San Joaquin staff continue to use a broad communications network and strategic partnerships to educate and engage varying audiences about key early childhood issues. Communication strategies include outreach events, targeted messaging, electronic newsletters to approximately 2,000 recipients, coverage by the media, and hands-on educational materials.

First 5 San Joaquin will leverage shared materials, curriculum, and in-kind services to build and maintain relationships with the University of California, Davis Cooperative Extension, school districts, government agencies, faith-based organizations, and multiple community consortia. These partnerships will enable First 5 San Joaquin to maximize efforts to address outcomes in identified areas of need for children and families.

### Mental Health and Substance Abuse Campaign

First 5 San Joaquin receives funding from CalWORKs to support messaging that addresses the effects of substance abuse and mental health on families with young children and promotes access to community services. In 2022-2023, First 5 San Joaquin implemented a multi-tiered strategy executed through a "Play for Wellness" campaign that integrates and leverages multiple First 5 San Joaquin campaign areas, including CalWORKs mental health, CalWORKs substance abuse prevention, FamilyWORKs, and Talk. Read. Sing. Draw. Play. (TRSDP). This campaign encourages overall family wellness by providing tools and support for positive health, wellbeing, and development through the utilization of parks. Strategies include the development of educational material for parents/caregivers and toolkits for community partners, the installation of a community mural in partnership with a local community center, placement of paid media, and the use of earned media. First 5 will continue this campaign in 2023-2024.

## Fund Balance

### First 5 San Joaquin Fund

The 2022-2023 beginning balance for the First 5 San Joaquin Special Revenue Fund (#20491) was \$10,782,988. The Commission's Ten-Year Plan incorporates a drawdown of the fund over a multiyear period. First 5 San Joaquin will transfer \$1,866,082 from the First 5 San Joaquin Special Revenue Fund to support staffing and administrative costs in 2023-2024. As of March 31, 2023, the First 5 San Joaquin Special Revenue Fund had a balance of \$9,338,045.

## 4049100000—Children & Families Program (First 5)

### Health Services

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#### Workload Data

	<u>Actual</u>			<b>Est./Act.</b>	<b>Projected</b>
	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>2023-2024</b>
<i>Contracts Monitored</i>	140	111	100	100	80
<i>Value of Contracts Administered</i>	\$12,614,036	\$13,322,960	\$13,220,874	\$16,763,258	\$16,528,561
<i>Number of Children Served</i>	17,701	12,145	12,747	14,000	12,000
<i>Number of Parents Served</i>	5,688	6,312	7,759	4,875	6,450
<i>Early Childhood Education/Home Visiting Technical Assistance</i>	19	13	15	15	30

# 4049400000—Operating Transfers to Health Care

## Health Services

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Operating Transfers Out	\$30,178,485	\$43,166,123	\$43,166,123	\$43,166,123	\$0
Total Appropriations	\$30,178,485	\$43,166,123	\$43,166,123	\$43,166,123	\$0
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$15,704,662	\$17,381,069	\$17,381,069	\$17,381,069	\$0
Operating Transfers In	8,688,769	20,000,000	20,000,000	20,000,000	0
Total Revenues	\$24,393,431	\$37,381,069	\$37,381,069	\$37,381,069	\$0
<b>Net County Cost</b>	\$5,785,054	\$5,785,054	\$5,785,054	\$5,785,054	\$0

## Purpose

This budget provides the required 1991 Realignment matching amounts and transfers to the Health and Mental Health Trust Funds, Maintenance of Effort (MOE) payments for Health and Mental Health, Medi-Cal Intergovernmental Transfer (IGT) payment to the State, and other health care-related General Fund contributions.

## Program Discussion

The 2023-2024 recommended budget for Operating Transfers to Health Care totals \$43,166,123 which represents no change from the 2022-2023 adjusted budget. Realignment funds received by the General Fund offset the amounts transferred to the Health and Mental Health Trust Funds.

An IGT is a transfer of public funds between government entities. The Medicaid funding system utilizes the IGT as a mechanism to transfer Federal funds to local government.

1. The County first remits payment to the State, which subsequently remits these funds to the Centers for Medicare and Medicaid Services.
2. Centers for Medicare and Medicaid Services follows by matching the amount with a predetermined percentage, which is distributed to Medicaid (Medi-Cal in California) managed care health plans, and ultimately received by San Joaquin General Hospital to offset non-reimbursed health care costs.

The recommended budget includes \$20.0 million for this program, the same amount as 2022-2023, offset by reimbursement from eligible, non-Medicaid funding within the Hospital Enterprise Fund.

The recommended 2023-2024 Net County Cost of \$5,785,054 consists of the minimum required Realignment match and the Discretionary County Contribution as follows:

Minimum Required Realignment Match	
San Joaquin General Hospital	\$2,138,053
Mental Health Services	\$1,063,736
Public Health Services	\$331,881
<b>Total</b>	<b>\$3,533,670</b>

Discretionary County Contribution (Contained within the Mental Health Fund)	
Public Guardian/Conservator	\$928,073
Substance Abuse Services	\$776,288
Mental Health Services	\$547,023
<b>Total</b>	<b>\$2,251,384</b>
<b>Net County Cost</b>	<b>\$5,785,054</b>

# 4049400000—Operating Transfers to Health Care

## Health Services

	2021-2022 Actual	2022-2023 Adjusted Budget	2023-2024 Recommended Budget
<b>Appropriations</b>			
<b>San Joaquin General Hospital</b>			
<i>Health Trust Match-W&amp;I 17608.10*</i>	\$2,138,053	\$2,138,053	\$2,138,053
<i>Health Trust Transfer-W&amp;I 17604</i>	14,690,618	16,339,000	16,339,000
<i>Intergovernmental Transfer-Medicaid</i>	8,688,769	20,000,000	20,000,000
<b>Total Hospital</b>	<b>\$25,517,440</b>	<b>\$38,477,053</b>	<b>\$38,477,053</b>
<b>Mental Health Services</b>			
<i>Mental Health Trust Transfer-W&amp;I 17604</i>	\$491,069	\$491,069	\$491,069
<i>Mental Health Trust Match-W&amp;I 17608.05*</i>	1,063,736	1,063,736	1,063,736
<i>Discretionary-Mental Health**</i>	547,023	547,023	547,023
<i>Discretionary-Public Guardian/Conservator**</i>	928,073	928,073	928,073
<b>Total Mental Health</b>	<b>\$3,029,901</b>	<b>\$3,029,901</b>	<b>\$3,029,901</b>
<b>Substance Abuse Services</b>			
<i>Discretionary-Ongoing Operations**</i>	\$776,288	\$776,288	\$776,288
<b>Total Substance Abuse</b>	<b>\$776,288</b>	<b>\$776,288</b>	<b>\$776,288</b>
<b>Public Health Services</b>			
<i>Health Trust Match-W&amp;I 17608.10*</i>	\$331,881	\$331,881	\$331,881
<i>Health Trust Transfer-W&amp;I 17604</i>	522,975	551,000	551,000
<b>Total Public Health</b>	<b>\$854,856</b>	<b>\$882,881</b>	<b>\$882,881</b>
<b>Total Appropriations</b>	<b>\$30,178,485</b>	<b>\$43,166,123</b>	<b>\$43,166,123</b>
<b>Revenues</b>			
<i>VLF-Mental Health-W&amp;I 17604</i>	\$491,069	\$491,069	\$491,069
<i>VLF-Health-W&amp;I 17604</i>	15,213,593	16,890,000	16,890,000
<i>Reimbursement from Hospital (non-Medicaid funds)</i>	8,688,769	20,000,000	20,000,000
<b>Total Revenues</b>	<b>\$24,393,431</b>	<b>\$37,381,069</b>	<b>\$37,381,069</b>
<b>Net County Cost</b>			
<i>*Required Match</i>	\$3,533,670	\$3,533,670	\$3,533,670
<i>**Discretionary</i>	2,251,384	2,251,384	2,251,384
<b>Total Net County Cost</b>	<b>\$5,785,054</b>	<b>\$5,785,054</b>	<b>\$5,785,054</b>

# Hospital Enterprise Fund

## Health Services

Richard Castro, Hospital Chief Executive Officer  
[www.sanjoaquingeneral.org/](http://www.sanjoaquingeneral.org/)

Enterprise Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$264,827,646	\$279,377,160	\$292,199,806	\$292,199,806	\$12,822,646
Services & Supplies	173,822,471	143,285,908	165,154,304	165,154,304	21,868,396
Centrally-Budgeted Expenses	12,455,707	13,270,520	16,003,243	16,003,243	2,732,723
Other Charges & Uses	3,832	0	0	0	0
Capital Expenditures	0	10,564,392	10,000,000	10,000,000	(564,392)
Depreciation	1,023,824	0	0	0	0
Operating Transfers Out	14,842,185	0	0	0	0
Clearing Accounts	13,198,923	0	0	0	0
Total Expenditures	\$480,174,588	\$446,497,980	\$483,357,353	\$483,357,353	\$36,859,373
Expenditure Reimbursements	(1,487,000)	0	0	0	0
Total Appropriations	\$478,687,588	\$446,497,980	\$483,357,353	\$483,357,353	\$36,859,373
<b>Earned Revenues By Source</b>					
Interest/Rents	\$685,653	\$916,549	\$1,048,428	\$1,048,428	\$131,879
Aid From Other Governments	7,457,376	59,878,228	67,729,723	67,729,723	7,851,495
Miscellaneous Revenues	(581,353)	5,187,861	5,169,409	5,169,409	(18,452)
Operating Transfers In	18,370,679	2,138,053	2,138,053	2,138,053	0
Hospital Special Revenues	459,331,060	377,661,696	405,609,399	405,609,399	27,947,703
Fund Balance	(6,575,827)	715,593	1,662,341	1,662,341	946,748
Total Revenues	\$478,687,588	\$446,497,980	\$483,357,353	\$483,357,353	\$36,859,373
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	1,328.0	1,380.0	1,430.0	1,430.0	50.0
<b>Temporary (Full-Time Equivalent)</b>	377.7	422.4	341.2	341.2	(81.2)
<b>Total Staffing</b>	1,705.7	1,802.4	1,771.2	1,771.2	(31.2)

- Operating Transfers In includes a General Fund Contribution of \$2,138,053.

## Purpose

The Hospital Enterprise Fund budget contains funding for San Joaquin General Hospital (SJGH) to provide comprehensive and accessible health care services to citizens of San Joaquin County, specialized health care delivery programs not otherwise available in the community, and organized health care programs and services for public and private organizations. SJGH also offers education and training programs for physicians and paramedical personnel and initiates and participates in community-wide health care planning.

California Welfare and Institutions Code Section 17000 mandates the provision of medical care to the indigent population of the County. The Board of Supervisors determines the level of service. Although the County is not mandated to own and operate a hospital, once the institution is established, services must be delivered according to various laws and regulations.

# Hospital Enterprise Fund

## Health Services

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Reduce 12 month nursing turnover rate.	32%	27%	March 2024
Fiscal Optimization			
Revenue Cycle Operational Improvements	Current	Target	Deadline
➤ Decrease balance of receivables in the "Billing Work in Progress" category through improvement in revenue cycle operations.	\$98.8 million	\$42.6 million	January 2024
Quality Program Management	Current	Target	Deadline
➤ Improve Leapfrog Value-Based Purchasing score.	50%	68% National Average	Fall 2023
Clinical Documentation Integrity (CDI) and Revenue Integrity	Current	Target	Deadline
➤ Improve Medical Diagnosis Related Group (DRG) documentation with Complication or Comorbidity (CC) or Major Complication or Comorbidity (MCC).	71.55%	81.00%	January 2024
➤ Improve Surgical DRG documentation with CC or MCC.	62.00%	70.00%	January 2024
Economic Development			
Enhance COVID Recovery	Current	Target	Deadline
➤ Reduce pandemic-related increase in contract nursing.	138 FTE	83 FTE	June 2025

### Major Budget Changes

#### Salaries & Employee Benefits

- \$24,430,399 Salary and benefits adjustments.
- \$5,860,672 Add 56 new positions.
- (\$633,659) Delete 4 vacant positions.
- (\$218,250) Transfer a Department Information Systems Analyst IV to County Support to Primary-

➤ (\$176,398)

➤ \$3,580,461

Preventive Health Care – Federally-Qualified Health Center (PPH-FQHC) budget (#4049800000).

Transfer a Business Analyst I-II to County Support to PPH-FQHC budget (#4049800000).

Increase in overtime.

# Hospital Enterprise Fund

## Health Services

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- (\$14,135,789) Increase in salary savings offset used to cover contracted labor costs.

- (\$5,884,790) Decrease in extra-help.

### Services & Supplies

- \$9,377,340 Increase in consumable medical supplies.
- \$5,758,484 Increase in contracted supplemental medical staffing and physician locum tenens costs.
- \$4,044,036 Increase in miscellaneous professional services.
- \$1,375,667 Increase in automation costs for EEG and laboratory services.
- \$770,195 Increase in non-consumable medical supplies and equipment.
- \$501,973 Increase in utilities costs.
- \$383,672 Increase in structures and grounds maintenance due to expiring warranties.
- \$232,568 Increase in food costs.
- \$217,072 Increase in rental costs for specialty beds.
- (\$898,440) Decrease in consulting fees due to completion of process improvement programs.
- (\$700,000) Decrease in payments to other County departments.

### Centrally-Budgeted Expenses

- \$1,189,538 Increase in Medical Malpractice insurance costs.
- \$1,039,194 Increase in Workers' Compensation and Casualty insurance costs.
- \$588,034 Increase in data processing charges.
- (\$108,118) Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$1,115,134 Capital contingency.
- \$650,000 Clinical documentation software.
- \$300,000 Server storage node.
- \$279,200 Surgical light.
- \$260,900 Portable cardiac monitor.
- \$216,000 Capacity management equipment.
- \$184,800 3D workstation.
- \$165,700 Replacement MRI patient monitor.
- \$124,600 EEG medical device.
- \$84,100 Ultrasound probe sterilizers (3).
- \$58,600 Ultrasound system.
- \$52,300 Refrigerator/freezer temperature monitoring system.
- \$46,700 Ventilator.
- \$44,300 UPS battery replacement.
- \$41,166 Steam sterilizer.
- \$34,900 Continuous renal replacement therapy device.
- \$31,100 Anesthesia monitoring device.
- \$12,400 ADA procedure chair.
- \$11,300 Bariatric lift.
- \$10,700 Bladder scanner.
- \$9,900 ADA exam table.
- \$9,900 ADA exam bed.
- \$5,900 Dual LED ceiling light.
- \$5,400 Catheter guidance device.

### Capital Expenditures - Structures & Improvements

- \$2,000,000 Sterile processing department renovation.
- \$1,500,000 Observation unit.

# Hospital Enterprise Fund

## Health Services

- \$1,000,000 Catheterization equipment replacement construction.
- \$1,000,000 Emergency department expansion.
- \$525,000 Clinical lab automation and robotic line upgrade.
- \$220,000 Time clock project.

### Revenues

- \$9,171,708 Increase in Medi-Cal revenue.
- \$7,851,495 Increase in Federal and State revenues.
- \$7,622,599 Increase in Quality Incentive Program revenue.
- \$6,758,157 Increase in Medicare revenue.
- \$2,521,756 Increase in insurance and private payer revenue.
- \$2,467,872 Increase in Enhanced Payment Program revenue.
- \$946,748 Increase in use of fund balance.
- (\$528,295) Decrease in contracts and grants revenue associated with San Joaquin Health Centers (SJ Health).

### Program Discussion

The 2023-2024 recommended budget for the Hospital Enterprise Fund totals \$483,357,353, which is an increase of \$36,859,373 from the 2022-2023 adjusted budget. A total of \$10.0 million in capital expenditures is budgeted for 2023-2024 representing a decrease of \$564,392 from 2022-2023. Similar to previous budgets, funding for capital items includes an allowance of \$1.1 million to address unanticipated capital needs during the year.

The recommended budget adds 56 new full-time positions, deletes 4 vacant positions, and transfers 2 positions to SJ Health for a net increase of 50 allocated positions.

Full-Time Positions	Net Change
Administrative Secretary	1
Audiologist	1
Business Analyst I-II	(1)
Clinical Social Worker I-II	2

Full-Time Positions	Net Change
Dept. Information Systems Analyst IV	(1)
Deputy Director I-II-SJGH	(1)
Deputy Director-SJGH Nursing	1
Food Service Worker I-III	8
Hospital Unit Clerk	4
Housekeeping Service Worker	9
Laundry Worker	2
Medical Laboratory Technician	1
Nurse Midwife	1
Nursing Assistant	7
Office Technician/Coordinator	(1)
Outpatient Clinic Assistant	1
Physical Therapist IV	1
Physician	3
Resident Physician Intern-4 <sup>th</sup> Year	5
Respiratory Care Practitioner I-II	1
Senior Nurse Practitioner-Inpatient	1
Senior Office Assistant	2
Staff Nurse I-V	1
Trauma Registrar I-II	2
<b>Total</b>	<b>50</b>

### Staff Recruitment Efforts

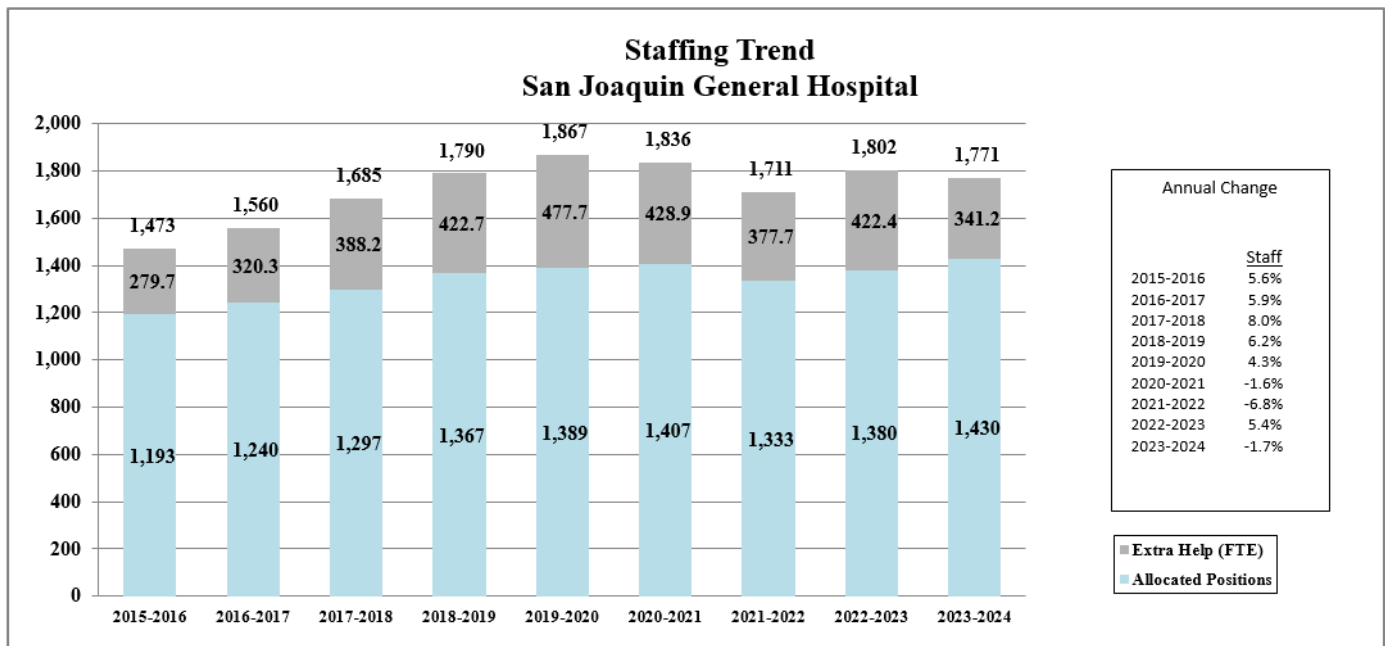
Of the 1,380 full-time positions allocated to SJGH, 218 positions (15.8%) were vacant as of April 7, 2023. Vacancies included 75 Registered Nurses (RNs) out of 445 (16.9%). This compares to a vacancy rate of 16.4% for the County as a whole on the same date.

The overall vacancy rate is higher than the 12.3% rate at this same time last year. Staff continue to work on hiring RNs and other clinical ancillary staff, including diagnostic imaging technicians. However, until vacancies are filled, full-time staff and extra-help are being augmented by the use of supplemental staffing to perform critical tasks. At midyear 2022-2023, supplemental staffing costs were projected at \$61.3 million, exceeding the adopted budget by \$46.2 million. The 2023-2024 budget includes \$18.1 million for supplemental staffing, an increase of \$3.0 million from 2022-2023. Salary savings of \$21.9 million are projected, offsetting budgeted supplemental staffing costs.



# Hospital Enterprise Fund

## Health Services



### Revenue

2023-2024 budgeted revenues of \$481.7 million consist of patient revenue of \$333.8 million and non-patient revenue of \$147.9 million, including the minimum \$2.1 million annual Maintenance of Effort contribution from the County General Fund. In 2023-2024 net patient revenue is projected to increase by \$18.5 million from the 2022-2023 budget, or 5.9%. Capacity is expected to remain high through 2023-2024 independent of the COVID-19 pandemic. Higher patient revenue is due to rate payer increases coupled with improved collections as a result of revenue cycle process improvements.

### Payer Mix

The 2023-2024 projected payer mix is based on actual experience through June 30, 2022, as follows:

Payer Mix	Hospital/Hospital-Based Clinics
Medi-Cal	53%
Medicare	24%
Insurance	21%
Private Pay/Indigent	2%
<b>Total</b>	<b>100%</b>

### Non-Patient Revenue

Projected 2023-2024 revenues from Federal, State, and local funding sources not directly related to patient care represent approximately 31% of total revenue. Non-patient revenues of \$147.9 million include supplemental funding of

\$118.0 million, \$2.1 million provided by the County General Fund, \$20.3 million in other non-patient revenues including interest, grants, and charges to other County departments, and \$7.5 million in net realignment revenue.

### Realignment Revenue

Realignment revenue is allocated based on sales tax and vehicle license fees collected by the State. Assembly Bill 85 legislation allows the State to take 80% of the County's net savings realized from implementation of the Affordable Care Act, up to the amount of realignment revenue allocated. Using a conservative approach, SJGH assumes revenues received will be taken back by the State, therefore, sets the funds aside as a reserve liability on the balance sheet pending the determination of the actual take-back amount. This process is generally completed two years after close of the respective fiscal year. Realignment revenue for 2023-2024 is estimated at \$24.5 million. Amounts received will be held as a reserve within the Hospital Enterprise Fund until the final take-back amount has been determined. Based on actual experience, reconciliation of prior year realignment revenue is projected to result in a net amount of \$7.5 million to be recognized during 2023-2024.

### Partnership with Dignity Health

A Management Services Agreement (MSA) with Dignity Health went into effect July 1, 2022. Approved by the Board of Supervisors on May 3, 2022 (R-22-94), the MSA allows Dignity Health to provide advice, assistance, and management oversight of the day-to-day administration of SJGH. The initial term of the MSA is 18 months, with an

# ***Hospital Enterprise Fund***

## ***Health Services***

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option for a 10-year term if agreed upon by both Dignity Health and the County.

Under the terms of the MSA, the County will continue to own and maintain authority and control of SJGH. SJGH's Designated Public Hospital (DPH) status will not change. It is important SJGH retain the DPH designation because of the substantial amount of supplemental funding available to SJGH only if that status is maintained.

Since July 1, 2022, the following MSA initiatives have begun:

- Revenue Cycle Improvement
  - Improve collection rate and lower accounts receivable days through consistent evaluation of closed accounts for underpayment recovery and growth and balances by major payers.
  - Patient financial accounting system uplift to be performed in May 2023. SJGH will partner with Cerner to evaluate current processes and systems and improve processes to match best practices.
  - Charge Description Master (CDM) review to evaluate charges and compare to reimbursement to market rates. Two separate projects will be performed over the 2nd quarter of 2023: a charge pricing analysis and a table review and update.
  - Development of policies and procedures to improve clinical documentation. This includes

coding audits to ensure services provided correspond to Diagnosis Related Group documentation billed on claims, maximizing reimbursement.

- Revenue integrity consultant hired to oversee charge capture projects and to monitor ongoing compliance.
- Improvement in Leapfrog Value-Based Purchasing Program scores, effected through hiring a new Interim Deputy Director of Standards and Compliance and through rigorous implementation of National Quality Forum safe practices, including medication safety.
- Group Purchasing Organization (GPO) conversion, allowing SJGH to aggregate its purchasing volume with other entities and use that leverage to negotiate discounts, went live in October 2022.
- Install electronic time clocks and utilize a time keeping system to reduce errors in payroll processing and integrate with productivity standards.

### **Fund Balance**

The SJGH projected cash balance as of June 30, 2023 is \$166.6 million. The 2023-2024 budget includes a \$1,662,341 drawdown of the Hospital Enterprise Fund balance to support planned activities.

# Hospital Enterprise Fund

## Health Services

### Income and Expenses

	Actual 2020-2021	Unaudited 2021-2022	Projected 2022-2023	Budgeted 2023-2024
<b>Operating Revenue</b>				
<i>Gross Patient Revenue Inpatient</i>	\$1,244,740,583	\$1,399,863,713	\$1,313,707,106	\$1,387,506,074
<i>Gross Patient Revenue Outpatient</i>	667,268,991	721,931,409	786,084,123	870,993,246
Total Gross Patient Revenue	\$1,912,009,574	\$2,121,795,122	\$2,099,791,229	\$2,258,499,320
Net Patient Revenue %	15.2%	15.4%	14.3%	14.8%
<i>Net Patient Revenue</i>	\$290,114,147	\$327,171,425	\$299,652,490	\$333,838,605
<i>Supplemental Payments</i>	122,848,308	145,663,882	134,060,140	117,955,301
<i>Other Operating Revenue</i>	21,574,936	32,512,940	36,365,136	20,263,053
<b>Total Operating Revenue</b>	<b>\$434,537,391</b>	<b>\$505,348,247</b>	<b>\$470,077,766</b>	<b>\$472,056,959</b>
<b>Operating Expenses</b>				
<i>Salaries and Benefits</i>	\$266,772,371	\$231,961,477	\$256,222,092	\$292,199,806
<i>Prof Fees – Physicians &amp; Locums</i>	19,849,012	20,106,400	22,931,893	29,607,623
<i>Prof Fees – Med Therapist</i>	6,125,891	13,595,936	10,503,019	7,632,684
<i>Prof Fees – Temp Staffing</i>	27,900,805	51,420,320	39,973,352	8,577,856
<b>Salaries &amp; Benefits*</b>	<b>\$320,648,079</b>	<b>\$317,084,132</b>	<b>\$329,630,356</b>	<b>\$338,017,969</b>
<i>Prof Fees – Consulting</i>	5,442,455	12,613,002	8,256,157	8,438,532
<i>Prof Fees – All Others</i>	2,695,049	5,456,376	6,235,740	2,913,175
<i>Supplies</i>	58,376,421	59,119,612	63,174,790	62,182,738
<i>Purchased Services</i>	31,301,675	33,464,946	30,806,790	39,664,951
<i>Other</i>	15,338,736	17,782,652	22,375,830	22,139,988
<i>Depreciation</i>	12,768,161	11,532,635	12,664,462	12,797,928
<b>Total Operating Expenses</b>	<b>\$446,570,576</b>	<b>\$457,053,355</b>	<b>\$473,144,125</b>	<b>\$486,155,281</b>
<b>Income from Operations</b>	<b>(\$12,033,185)</b>	<b>\$48,294,892</b>	<b>(\$3,066,359)</b>	<b>(\$14,098,322)</b>
Realignment	20,257,360	19,410,835	2,500,000	7,500,000
County General Fund Contribution	2,138,053	2,138,053	2,138,053	2,138,053
<b>Net Income</b>	<b>\$10,362,228</b>	<b>\$69,843,780</b>	<b>\$1,571,694</b>	<b>(\$4,460,269)</b>

Expenses exclude capital expenditures, but include depreciation expense.

\*Includes Contract Labor

# Hospital Enterprise Fund

## Health Services

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Inpatient (Average Daily Census)</b>					
Medical/Surgical	47.0	73.6	70.0	59.0	67.7
Medical Guarded Unit	20.6	17.2	17.2	12.7	16.7
Intensive Care/Cardiac Care	9.7	14.6	14.5	11.9	14.0
Pediatrics	2.5	0.0	0.0	0.0	0.0
Obstetrics	12.9	11.9	11.8	11.1	11.5
Intensive Care Nursery	11.8	10.9	11.1	13.8	10.8
Progressive Care Unit	25.5	22.7	23.8	22.8	23.0
<b>Total Inpatient</b>	<b>130.0</b>	<b>150.9</b>	<b>148.4</b>	<b>131.3</b>	<b>143.7</b>
<b>Newborn Nursery</b>	7.5	6.7	6.6	7.6	7.6
<b>Outpatient (Visits)</b>					
Specialty Care Clinics	54,677	58,590	57,385	56,042	58,683
Dialysis	26,803	25,448	24,685	20,377	23,850
Rehabilitation Therapies	40,886	39,196	39,921	40,670	32,723
Emergency Room	46,444	43,144	50,563	55,922	57,443
<b>Total Outpatient</b>	<b>168,810</b>	<b>166,378</b>	<b>172,554</b>	<b>173,011</b>	<b>172,699</b>
<b>Average Patients Per Day</b>					
Emergency Department	127	118	139	153	157
Clinics	223	224	225	209	226



ADOPTED BUDGET

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*Human Services*

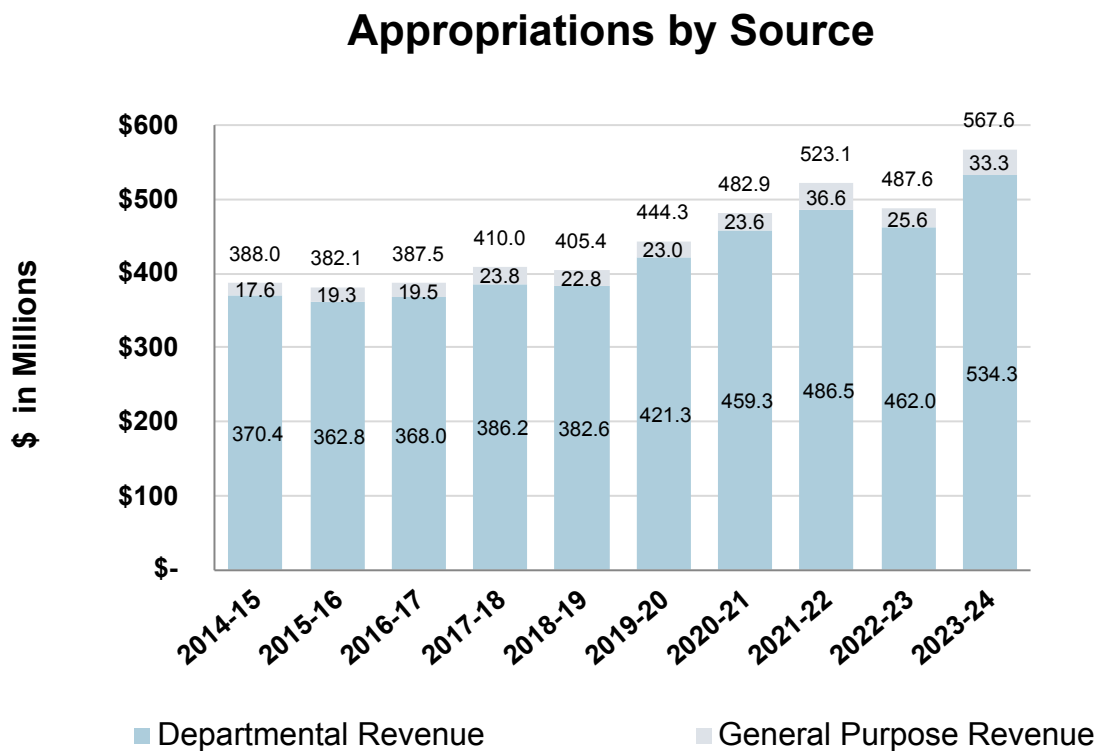
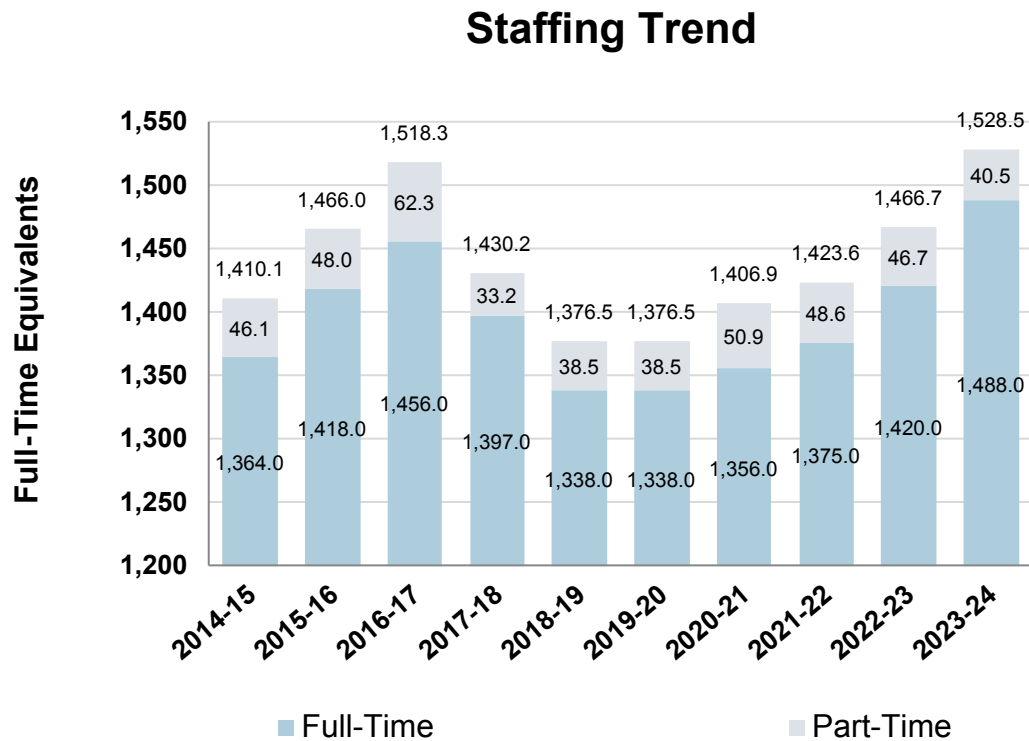
# Human Services

## Appropriations

	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Summary — All Human Services Agency Budgets</b>	G-4				
5050101000 Human Services Agency-Administration	G-6	\$413,079,842	\$490,177,457	\$490,177,457	\$77,097,615
5053900000 Mary Graham Children's Shelter	G-13	10,306,885	13,837,071	13,837,071	3,530,186
5054000000 Community Services	G-16	2,435,212	5,420,062	2,723,327	288,115
5054101000 Aging & Community Services	G-25	18,300,927	17,431,381	17,431,381	(869,546)
5055103000 Employment & Economic Development	G-31	26,040,994	25,348,242	25,348,242	(692,752)
5055246000 Neighborhood Preservation	G-38	16,619,955	16,806,164	16,806,164	186,209
5055600000 Veterans Services Office	G-43	783,009	1,233,842	1,233,842	450,833
<b>Total - Human Services</b>		<b>\$487,566,824</b>	<b>\$570,254,219</b>	<b>\$567,557,484</b>	<b>\$79,990,660</b>

# Human Services

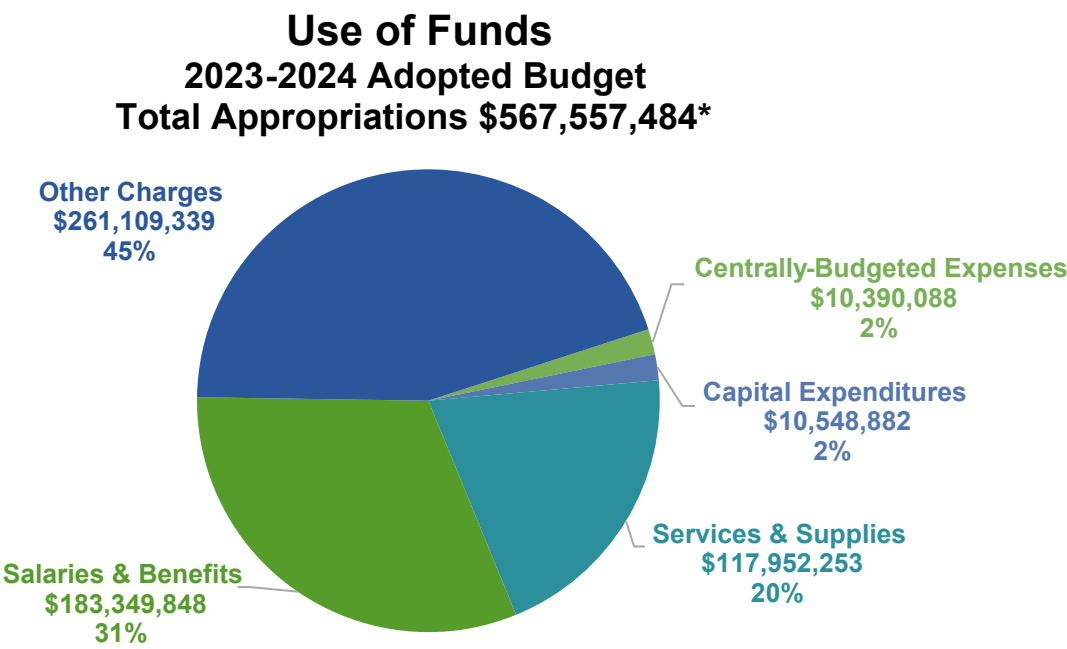
## Appropriations



Human Services

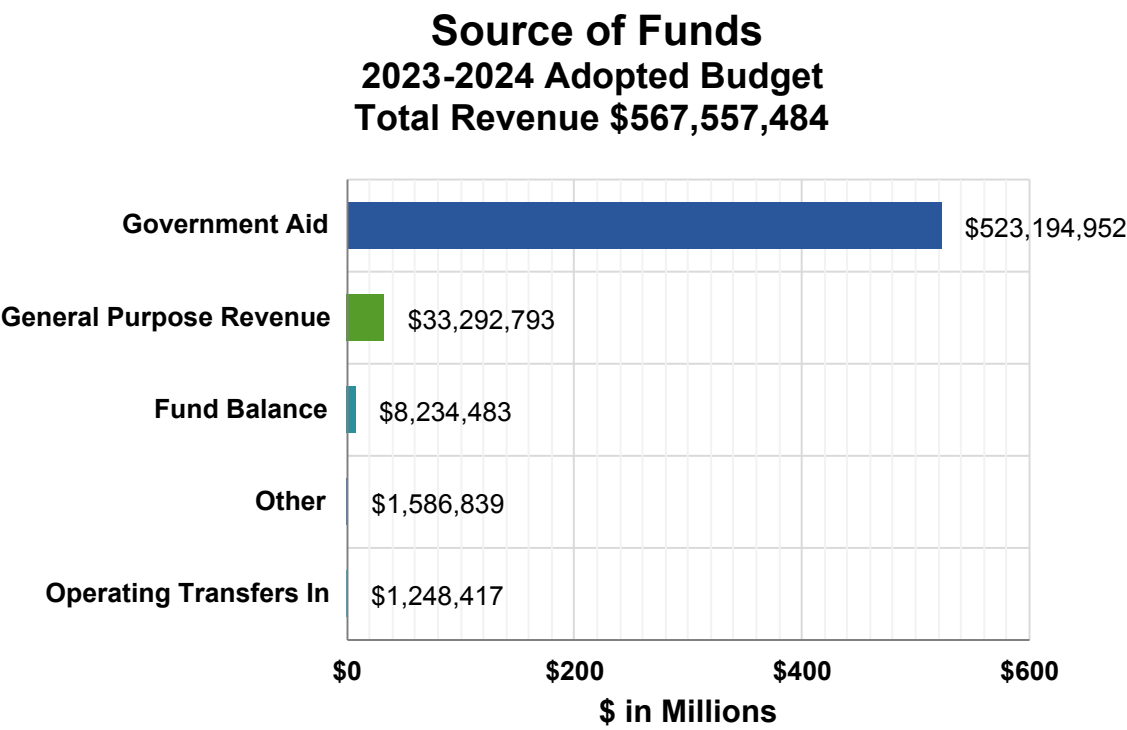
Appropriations

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*\* \$583,350,410 Expenditures less \$15,792,926 Cost Reimbursements*

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# Summary

## All Human Services Agency Budgets

Chris Woods, Human Services Director  
[www.sjchsa.org/](http://www.sjchsa.org/)

	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$127,379,085	\$147,593,879	\$172,974,925	\$172,974,925	\$25,381,046
Services & Supplies	54,699,578	78,038,384	97,766,637	97,766,637	19,728,253
Centrally-Budgeted Expenses	8,108,209	8,004,290	9,754,624	9,754,624	1,750,334
Other Charges & Uses	189,505,554	211,115,430	242,184,251	242,184,251	31,068,821
Capital Expenditures	1,414,810	7,456,622	10,146,000	10,146,000	2,689,378
Clearing Accounts	(20,559)	0	0	0	0
Total Expenditures	\$381,086,677	\$452,208,605	\$532,826,437	\$532,826,437	\$80,617,832
Expenditure Reimbursements	(4,984,877)	(8,416,743)	(9,514,446)	(9,514,446)	(1,097,703)
Total Appropriations	\$376,101,800	\$443,791,862	\$523,311,991	\$523,311,991	\$79,520,129
<b>Earned Revenues By Source</b>					
Interest/Rents	\$11,336	\$10,775	\$10,775	\$10,775	\$0
Aid From Other Governments	354,077,561	415,066,951	490,001,593	490,001,593	74,934,642
Charges For Services	2,556,284	0	0	0	0
Miscellaneous Revenues	617,706	540,000	539,500	539,500	(500)
Operating Transfers In	1,547,707	5,284,189	3,014,499	3,014,499	(2,269,690)
Total Revenues	\$358,810,594	\$420,901,915	\$493,566,367	\$493,566,367	\$72,664,452
<b>Net County Cost</b>	\$17,291,206	\$22,889,947	\$29,745,624	\$29,745,624	\$6,855,677
<b>Allocated Positions</b>	1,303.0	1,339.0	1,403.0	1,403.0	64.0
<b>Temporary (Full-Time Equivalent)</b>	35.7	28.1	27.6	27.6	(0.5)
<b>Total Staffing</b>	1,338.7	1,367.1	1,430.6	1,430.6	63.5

## Purpose

The Human Services Agency (HSA) provides State and Federal-mandated public assistance and a variety of social service programs for the residents of San Joaquin County.

The Human Services Agency (HSA) administers 11 budgets:

- 4049100000 Children & Families Program (First 5)
- 5050101000 HSA - Administration
- 5050106000 California Work Opportunity and Responsibility to Kids (CalWORKs)
- 5050107000 Foster Care
- 5050108000 Adoption Assistance
- 5050110000 General Assistance
- 5050118000 In-Home Supportive Services
- 5050132000 Temporary Homeless Shelter
- 5050144000 Refugee Cash Assistance
- 5053900000 Mary Graham Children's Shelter
- 5054101000 Aging & Community Services

# Summary

## All Human Services Agency Budgets

### Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Train Agency in the principles of Diversity, Equity, and Inclusion (DEI) to enable staff to better understand other cultures and facilitate genuine communication.	July 2022, 0% of staff trained	75% of staff trained 85% of staff trained	December 2023 December 2024
➤ Create a promotions page on the Agency's intranet to expose employees to career pathways and facilitate professional development and employee retention.	July 2022, page does not exist	Page will be deployed on the Agency's intranet	June 2023
➤ Decrease the Agency's vacancy rate, improving retention.	July 2022, 13.80% vacancy rate	Reduce by 0.5% Reduce by 0.8% Maintain at or below 13%	December 2023 December 2024 June 2025
Demonstrate Leadership Development	Current	Target	Deadline
➤ Train the Agency's leadership team to increase capacity and collaboration to better serve our clients and internal teams.	July 2022, No Supervisors, Managers, and Executives attended leadership training in current window	25% of staff trained 40% of staff trained 50% of staff trained	December 2023 December 2024 June 2025
Augment Digitization and Automation	Current	Target	Deadline
➤ Increase the Agency's social media presence in the community and create a uniform experience for all department social media sites.	5,186 current social media followers on Facebook and Instagram	10,000 social media followers	June 2025
➤ Reduce the Agency's storage footprint by 50% by digitizing eligibility files and destroying confidential hard copies of files.	July 2022, 28,498 boxes in storage	22,000 boxes in storage 14,249 boxes in storage	December 2024 June 2025

# 5050101000—Human Services Agency-Administration

## Human Services

Chris Woods, Human Services Director  
[www.sjchsa.org/](http://www.sjchsa.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$113,393,702	\$130,867,302	\$153,338,087	\$153,338,087	\$22,470,785
Services & Supplies	47,110,258	63,978,027	84,978,023	84,978,023	20,999,996
Centrally-Budgeted Expenses	7,373,714	7,248,237	8,698,047	8,698,047	1,449,810
Other Charges & Uses	189,505,528	211,110,430	242,182,151	242,182,151	31,071,721
Capital Expenditures	1,260,766	7,007,000	8,541,000	8,541,000	1,534,000
Clearing Accounts	(20,559)	0	0	0	0
Total Expenditures	\$358,623,409	\$420,210,996	\$497,737,308	\$497,737,308	\$77,526,312
Expenditure Reimbursements	(4,021,016)	(7,131,154)	(7,559,851)	(7,559,851)	(428,697)
Total Appropriations	\$354,602,393	\$413,079,842	\$490,177,457	\$490,177,457	\$77,097,615
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$340,732,942	\$396,974,719	\$469,720,568	\$469,720,568	\$72,745,849
Charges For Services	2,556,284	0	0	0	0
Miscellaneous Revenues	569,818	500,000	500,000	500,000	0
Total Revenues	\$343,859,044	\$397,474,719	\$470,220,568	\$470,220,568	\$72,745,849
<b>Net County Cost</b>	\$10,743,349	\$15,605,123	\$19,956,889	\$19,956,889	\$4,351,766
<b>Allocated Positions</b>	1,183.0	1,190.0	1,250.0	1,250.0	60.0
Temporary (Full-Time Equivalent)	2.7	1.8	3.9	3.9	2.1
Total Staffing	1,185.7	1,191.8	1,253.9	1,253.9	62.1

## Purpose

The Human Services Agency Administration budget reflects the combined administrative and financial assistance program costs and funding for the public assistance programs administered by HSA:

- 5050101000 Administration
- 5050106000 CalWORKs
- 5050107000 Foster Care
- 5050108000 Adoption Assistance
- 5050110000 General Assistance
- 5050118000 In-Home Supportive Services
- 5050132000 Temporary Homeless Shelter
- 5050144000 Refugee Cash Assistance

## Major Budget Changes

### Salaries & Employee Benefits

- \$15,390,204 Salary and benefits adjustments.
- (\$252,172) Delete two Social Worker Supervisors I.
- \$7,200,883 Add 62 new positions.
- \$131,870 Increase in extra-help.

# 5050101000—Human Services Agency-Administration

## Human Services

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### Services & Supplies

- |               |  |            |   |
|---------------|--|------------|---|
| ➤ \$7,710,066 | Increase in program contracted service expenses.   | ➤ \$90,000 | Network blade.  |
| ➤ \$3,071,952 | Increase in Housing Support Program allocation.  | ➤ \$50,000 | LED projectors for the Staff Development training room (5). |
| ➤ \$2,253,421 | Increase in Child Welfare Legal Assistance and District Attorney investigation expenses. | ➤ \$45,000 | Storage Area Network (SAN) device.                          |
| ➤ \$2,200,656 | Increase in child care expenses.   | ➤ \$31,000 | Printer replacements (4).                                   |
| ➤ \$2,091,890 | Increase in Child Welfare service expenses.  | ➤ \$25,000 | Diesel tank.  |
| ➤ \$1,314,986 | Increase in Employment and Economic Development Department expenses.                     | ➤ \$20,000 | Print shop equipment.                                       |
| ➤ \$697,781   | Increase in CalWORKs diaper distribution expenses.                                       |            |   |
| ➤ \$660,000   | Increase in Employment Services mileage reimbursement related expenses.                  |            |   |
| ➤ \$453,000   | Increase in postage expenses.  |            |   |

### Centrally-Budgeted Expenses

- |             |   |
|-------------|---|
| ➤ \$561,233 | Increase in data processing charges.                            |
| ➤ \$299,834 | Increase in Workers' Compensation and Casualty insurance costs. |
| ➤ \$588,743 | Cost Allocation Plan adjustment.                                |

### Other Charges

- |                |  |
|----------------|--|
| ➤ \$20,174,129 | Increase in CalWORKs program costs.                    |
| ➤ \$5,818,005  | Increase in Foster Care program costs.                 |
| ➤ \$3,470,339  | Increase in Adoption program costs.                    |
| ➤ \$1,485,231  | Increase in In-Home Supportive Services program costs. |

### Capital Expenditures - Equipment

- |               |                                  |
|---------------|----------------------------------|
| ➤ \$2,970,000 | Reconfigure workstations (495).  |
| ➤ \$1,250,000 | Badge access system replacement. |
| ➤ \$430,000   | Network equipment.               |

### Capital Expenditures - Structures & Improvements

- |               |  |
|---------------|--|
| ➤ \$1,500,000 | HSA main building roof replacement.                      |
| ➤ \$1,200,000 | Reconfigure the south lobby in the main HSA building.    |
| ➤ \$750,000   | Supply and return fan upgrades in the main HSA building. |
| ➤ \$130,000   | HSA main building door replacement.                      |
| ➤ \$50,000    | General building maintenance.                            |

### Expenditure Reimbursements

- |             |   |
|-------------|---|
| ➤ \$387,493 | Increase in reimbursement from other sources.         |
| ➤ \$41,204  | Increase in salary reimbursement from other agencies. |

### Revenues

- |                 |  |
|-----------------|--|
| ➤ \$46,025,893  | Increase in Federal and State funds to offset additional costs.                      |
| ➤ \$19,669,275  | Increase in Federal and State CalWORKs funding.                                      |
| ➤ \$5,397,547   | Increase in Federal and State Foster Care reimbursements.                            |
| ➤ \$3,230,663   | Increase in Federal and State Adoption Assistance Program reimbursements.            |
| ➤ \$121,350     | Increase in Federal and State CalWORKs Temporary Homeless Assistance reimbursements. |
| ➤ (\$1,698,879) | Decrease in State and Federal reimbursements for In-Home Supportive Services.        |

# 5050101000—Human Services Agency-Administration

## Human Services

### Program Discussion

The 2023-2024 recommended budget for Human Services Agency (HSA) totals \$497,737,308, which is an increase of \$77,526,312 from the 2022-2023 adjusted budget.

#### Administration – \$255,380,339

The Administration recommended budget contains administrative costs for the operation of all Agency programs and totals \$255,380,339, which is an increase of \$46,454,591 from 2022-2023.

The following new positions are included in the 2023-2024 budget:

Position	# Added
Administrative Assistant Jr-I	1
Contracts Analysts	2
Dept Info System Administrator	1
Eligibility Worker III	3
HSA Staff Analyst I-II	7
Management Analyst III	1
Office Supervisor	3
Paralegal I-II	2
Public Information Specialist	1
Senior Office Assistant	11
Social Worker I-II	4
Social Worker Supervisor II	3
Social Worker I-V	23
<b>Total</b>	<b>62</b>

### Realignment Impact

In 1991 and 2011, the State Legislature realigned programs, known as 1991 and 2011 Realignment, from the State to local governments. Realignment funds support critical programs at the local level, including health, behavioral health, public safety, and social services. The State Constitution protects these funds from being used for other purposes. However, the amount of funding available varies according to the economic conditions in the State because it is based on Sales Tax and Vehicle License Fees. Estimates from the County Welfare Directors Association project a 1.5% increase in the 1991 Realignment base and a 2% increase in 2011 Realignment funding for 2023-2024.

### Agency Structure

HSA is organized into five bureaus: Income Maintenance; Children's Services; Employment and Youth Services; Aging and Community Services; and Administrative Services.

#### Income Maintenance Bureau

The Income Maintenance Bureau is responsible for determining, issuing, and maintaining the correct and timely Federal and State-mandated benefits for the CalWORKs, CalFresh, Medi-Cal, Foster Care, and Refugee Cash Assistance programs.

HSA continues to collaborate with community partners to conduct outreach to potentially eligible households and to assist with benefit program application and renewal processes. Eligibility Workers are co-located at the Boggs Tract, Garden Acres, Kennedy, Larch Clover, Lodi, and Northeast Community Centers to provide County residents with increased access to the CalWORKs, CalFresh, and Medi-Cal programs. In collaboration with San Joaquin General Hospital (SJGH), HSA will continue to provide enhanced access to the Medi-Cal program by providing a Medi-Cal eligibility unit to process Medi-Cal applications for patients served at SJGH, including inmates that receive acute inpatient hospital services. Additionally, an Eligibility Worker will rotate between Channel Medical Center, Tracy Care Center, and Woodbridge Medical Center, to assist patients at those clinics with their Medi-Cal applications.

#### Children's Services Bureau

The Children's Services Bureau provides services that ensure the safety, permanency, and well-being of children who have been abused or neglected. The major components of the Children's Services programs are Child Abuse Prevention, Emergency Response, Intensive Family Preservation, Family Maintenance, Family Reunification, Permanent Placement, Adoption, Extended Foster Care, and Independent Living. Each component requires specific in-person service delivery by Social Workers to prevent or remedy neglect or abuse. State law requires Children's Services agencies to investigate reports of child maltreatment either within 24 hours or within 10 days, based upon the severity of the allegations and risk to the child. When CPS receives a report of suspected child abuse or neglect, Social Workers investigate the report to determine if the alleged child maltreatment is substantiated as defined in State law. Substantiated reports require further action, such as the provision of supportive services to the child and family, or if there is imminent risk to the child's safety, the removal of the child from the home.

The Governor signed Assembly Bill (AB) 403 into law on October 11, 2015. AB 403 provides a statutory and policy framework to ensure services are child-centered and support the goal of maintaining stable permanent families. The legislation advances California's long-standing goal to move away from the use of long-term group home care by increasing youth placement in family settings. This transformed existing group home care into an environment where youth who are not ready to be placed with families can

# **5050101000—Human Services Agency-Administration**

## **Human Services**

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receive short-term intensive treatment geared towards transitioning them to family-based care.

The Continuum of Care Reform adopted through AB 403, includes the mandate to conduct Child and Family Team (CFT) meetings within 60 days of a child's removal from the home, and then at least every six months thereafter while the Agency is providing services to the family. Additionally, CFT meetings must occur when a child changes placement. These meetings include the child's family members, service providers, and other support people. The goal is to discuss the strengths and safety concerns of each family and to incorporate stakeholder voices in the case service plan.

The Family First Prevention Services Act (FFPSA) became Federal law as part of the Bipartisan Budget Act on February 9, 2018. FFPSA Part IV was implemented in California on October 1, 2021. A qualified Social Worker must assess foster youth prior to placement in a short-term residential therapeutic program (STRTP). The Social Worker must provide additional documentation and receive Court approval within 60 days of placing a youth in a STRTP. The Child Welfare Agency is also required to provide, arrange, and/or ensure the provision of aftercare services for youth in transition from a STRTP to a home-based setting.

Ongoing case management services assist in the development of basic life skills necessary to keep the family intact or to develop alternate family structures when the child cannot safely remain in the home. The Children's Services Bureau provides support for approximately 12 months to children and families if the children are able to safely remain in the home. If it is determined that a child cannot remain in the home, even with intensive family preservation and support services, the Children's Services Bureau will arrange for foster placement in the setting most-consistent with the best interests of the child. Children and their families receive up to 18 months of services when a child is removed from the home and the family is making progress towards reunification. When a child cannot be safely returned to a home after services have been delivered, the child must be provided with a family-like living arrangement as soon as possible.

Adoption services provide permanency options for children who cannot be reunified with their birth parents. The Independent Living Program provides foster youth with education and other supportive services designed to help transition youth from foster care to living independently. Federal and State laws require Social Workers to visit foster children monthly.

### ***Employment and Youth Services Bureau***

The Employment and Youth Services Bureau provides employment, education, and training services under the CalWORKs program. Participation includes job preparation

and placement services, work experience, employment activities, vocational training and education, mental health and substance abuse treatment, and referrals to community services. The CalWORKs Employment Services program provides 60 months of flexibility for CalWORKs customers to receive a wide-array of services prior to entering the workforce.

The County's Home Visitation Program (HVP) focuses on health education using the Parents as Teachers curriculum, and addresses literacy, financial planning, and increased work participation rates for CalWORKs families. The Employment and Youth Services Bureau expects HVP, known locally as FamilyWORKs and coordinated for HSA by First 5 San Joaquin, to serve 400 families in 2023-2024, with \$3.1 million in funding.

CalWORKs Housing Support Program (HSP) provides homeless CalWORKs families with housing navigation and case management services. HSP, known locally as HousingWORKs, coordinated for HSA by First 5 San Joaquin, began in December 2019. In 2023-2024, the program will provide housing stability and case management services to 280 homeless CalWORKs families and 155 CalWORKs families at risk of becoming homeless. In 2023-2024, this program will receive \$3,236,661 in funding.

The General Assistance (GA) Division determines eligibility for the GA Program, which provides support to indigent adults who cannot support themselves and do not receive any other public assistance. The GA Division is also responsible for the AB 109 and the AB 720 (2013) programs. Because of AB 109, HSA will continue to work collaboratively with the Probation Department to enroll newly released individuals and probationers in the CalFresh and Expanded Medi-Cal programs by co-locating Eligibility Workers at the assessment center. In addition, with the enactment of AB 720, HSA is collaborating with the Sheriff's Office to enroll pre-sentenced inmates and inmates that receive acute inpatient hospital services in Medi-Cal. The GA Division also works with the Sheriff and local prison authorities to coordinate a pre-release program to begin the application process for Expanded Medi-Cal to shorten or eliminate any break in medical coverage upon release from jail or prison.

### ***Aging and Community Services Bureau***

The Aging and Community Services Bureau provides mandated services to abused, neglected, exploited, and/or disabled adults to prevent or reduce inappropriate institutional care. The Bureau strives to help individuals achieve and maintain the highest level of independence, self-support, and self-sufficiency within the range and scope of their abilities. Mandated services for adults include Information and Referral, In-Home Supportive Services (IHSS), and Adult Protective Services (APS).

# 5050101000—Human Services Agency-Administration

## Human Services

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The Budget Act of 2021 appropriated funds to APS to implement the Home Safe program. Home Safe supports the safety and housing stability of older adults and adults with disabilities served by APS who are experiencing or at risk of homelessness because of alleged elder abuse, neglect, or self-neglect. APS customers who are eligible for Home Safe include those who have received a judgment for eviction, a Notice to Pay Rent or Quit, eviction is imminent, or the nighttime residence is a shelter, motel or space not designed as a regular sleeping accommodation for human beings. Services include intensive case management, housing stabilization, housing navigation, and direct financial assistance. The program calls for coordination with the local homelessness response system and the application of a Housing First strategy that includes racial equity principles. APS implemented Home Safe in August 2022, with an end term of June 30, 2024. This program will serve a minimum of 35 older adults and adults with disabilities annually.

IHSS provides services to help elderly and disabled persons remain in their homes. To be eligible, customers must be over 65 years of age, disabled, or blind; and meet resource limits for the program. IHSS provides an alternative to out-of-home care, such as nursing homes or board and care facilities. The IHSS caseload continues to grow as the number of eligible Medi-Cal customers increases.

### *Administrative Services Bureau*

The Administrative Services Bureau provides support services throughout HSA related to policies and procedures, staff development and training, information systems, fiscal and accounting, quality control, fair hearings, benefit recovery, collections, personnel, reception and benefit issuance, and staff support.

Staff Development and Training has created a training curriculum and delivers comprehensive instruction to HSA staff, with a focus on the CalWORKs, CalFresh, Medi-Cal, and the California Statewide Automated Welfare System. To meet the demands of the complex programs administered by HSA, Eligibility Workers must complete a comprehensive training course and ongoing in-service refresher trainings. Topics range from Medi-Cal eligibility to determining when and how to provide expedited benefits and services to customers. This group will conduct three induction training classes in 2023-2024. These classes provide the foundational training necessary for newly-hired Eligibility Workers.

The Administrative Bureau will evaluate a modification to the office configuration and workstations throughout the second, third, and fourth floors. The changes will improve workflow and ensure compliance with the Americans with Disabilities Act.

The following are changes projected for the various assistance programs administered by HSA:

### **CalWORKs Assistance – \$113,918,542**

The CalWORKs program is the largest cash assistance program for children and families, providing financial help to meet basic needs (shelter, food, and clothing) when a family is unable to meet those needs on their own. The CalWORKs program is part of a welfare system that places a high value on recipients securing work. Eligible families must include a child under the age of 18, who lacks parental support because of absence, death, incapacity, or the unemployment of one or both parents. CalWORKs Assistance is time-limited for most adults in the household, and most recipients are required to work or attend Welfare to Work activities. Necessary supportive services, including childcare, are available to ensure employment is possible. The amount of a family's monthly assistance payment depends on several factors, including the number of people who are eligible and the special needs of those family members. The family's income is a factor when calculating the amount of cash aid the family receives.

The recommended budget reflects an increase of \$20,174,129 from 2022-2023. In 2023-2024, the average monthly caseload is projected to be 9,343. This represents a decrease of 7.0% from the 2022-2023 budgeted caseload, offset by a 28.5% cost per case increase.

### **Foster Care Assistance – \$61,395,356**

The Foster Care program provides support payments for children in out-of-home care. Counties administer this program in accordance with the regulations, standards, and procedures set by the California Department of Social Services as authorized by law. The out-of-home care system protects children who cannot safely remain with family. Most children who are removed from their parents are made dependents of the Juvenile Dependency Court. A smaller number are wards of Juvenile Probation or live with legal guardians.

Currently, these children are placed in family homes with relatives, resource family homes, homes certified by foster family agencies, and in short-term residential therapeutic programs. Statutorily, placement with relatives is given preference over other types of placements. All providers for these children are required to complete the Resource Family Approval process.

A written case plan is developed for each child and family to ensure care and protection is provided in the best interests and individual needs of the child. The plan includes a judicial or administrative review every six months to determine if out-of-home care and court monitoring is still required. As children in the program begin to mature, independent living training and services are made available to youth ages 16 to 24 to provide job and career development skills that will be needed to live independently. AB 12 extends Foster Care



# **5050101000—Human Services Agency-Administration**

## **Human Services**

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benefits to youth through age 21. To be eligible to receive extended Foster Care benefits, youth must be in Foster Care prior to age 18.

The recommended budget reflects an increase of \$5,818,005 from 2022-2023. In 2023-2024, the average monthly caseload is projected to be 1,365. This represents a decrease of 1.0% from the 2022-2023 budgeted caseload, offset by an 11.5% cost per case increase.

### **Adoptions Assistance Program (AAP) – \$35,751,334**

The AAP was developed to encourage the adoption of special needs children and remove the financial disincentives for families to adopt. If the child is deemed eligible, an adoption assistance agreement or a deferred adoption assistance agreement is executed with the adoptive parents prior to the adoption finalization. A reassessment of the child's needs and family's circumstances is conducted every two years. The amount of financial assistance is determined based on the individual needs of the child and the circumstances of the family.

AB 12 extended AAP benefits beyond the age of 18 for eligible youth adopted at age 16 or later. The intent of the extended AAP benefit is to help youth maintain a safety net as they transition to independence.

The recommended budget includes an increase of \$3,470,339 from 2022-2023. In 2023-2024, the average monthly caseload is projected to be 2,224. This represents no change from the 2022-2023 budgeted caseload. AAP expects a cost per case increase of 10.8%.

### **General Assistance (GA) – \$924,818**

The General Assistance (GA) Division determines eligibility for the GA Program, which provides support to indigent adults who cannot support themselves and do not receive any other public assistance. California Welfare and Institutions Code Section 17000 requires California counties to administer a GA program, and delegates the authority to define and develop the GA program to each county's Board of Supervisors. Participants repay GA payments by working a specified number of hours each month in the GA Work Program. Customers may also repay GA payments by collecting proceeds from the sale of real property, withholding an amount equal to the GA interim assistance payments from a lump sum Social Security award. GA payments may also be repaid by the recipient's sponsor.

The recommended budget reflects no change from 2022-2023. Historically, the County has funded 100% of the GA program. In 2015-2016, AB 109 funding became available to support the transitional housing portion of the GA

program for eligible AB 109 customers. This dedicated funding totaling \$174,818 for 2022-2023 represents 18.9% of the total projected GA expenditures.

### **In-Home Supportive Services (IHSS) – \$27,876,470**

The IHSS program provides specified supportive services to enable eligible persons to remain in their own homes as an alternative to out-of-home care, such as nursing homes or board and care facilities. Eligible persons are aged, blind, or disabled recipients of public assistance, or similar persons with low incomes. Disabled children are also eligible for IHSS. Services include domestic services such as meal preparation, laundry, shopping, and errands, personal care services, assistance while traveling to medical appointments or other sources of supportive services, protective supervision, teaching and demonstration directed at reducing the need for supportive services, and certain paramedical services ordered by a physician.

The recommended budget includes an increase of \$1,485,231 from 2022-2023. Senate Bill 80, effective July 1, 2019, established a Maintenance of Effort (MOE). The County's IHSS MOE payment increases annually according to an inflation factor, and the County's share of any locally negotiated wage and benefit increases. The State funds IHSS administrative costs through an allocation from the State's General Fund. The County must fund any administrative costs above the State General Fund allocation. IHSS expects caseloads to increase by 3.0% in 2023-2024.

The IHSS Public Authority (PA) is a separate and distinct entity that reports directly to the Board of Supervisors acting as the Governing Board of the PA. The PA assists IHSS recipients and providers within the IHSS program. The PA is the employer of record for providers, maintains the provider registry, and facilitates training for the providers.

### **Temporary Homeless Shelter – \$2,394,449**

Families who are eligible for CalWORKs assistance and are homeless may apply for a special-need payment to meet costs for temporary and permanent housing. The maximum homeless assistance payment is based on the size of a CalWORKs family. CalWORKs families may be eligible to apply for Homeless Assistance benefits to assist with the payment of rent arrearages. These payments are part of a family's Homeless Assistance payment.

The recommended budget reflects an increase of \$124,017 from 2022-2023. In 2023-2024, HSA expects the monthly caseload to be 1,791. This represents an increase of 2.5% from the 2022-2023 budgeted caseload and a 2.9% cost per case increase.



# 5050101000—Human Services Agency-Administration

## Human Services

### Refugee Cash Assistance – \$96,000

The Refugee Cash Assistance program provides up to eight months of cash assistance to needy refugees without children who are not otherwise eligible for any other cash aid. These refugees are unable to return to their country of origin because of persecution or a well-founded fear of persecution on

account of race, religion, nationality, or political opinion. These individuals may also be eligible to receive employment and other social services during the same eight-month period. Refugee Cash Assistance program expenses are eligible for 100% Federal reimbursement.

#### Workload Data

	Actual			Est./Act. 2022-2023	Projected 2023-2024
	2019-2020	2020-2021*	2021-2022		
<b>CalWORKs Assistance</b>	10,650	9,019	8,799	9,183	9,343
<b>Foster Care</b>					
<i>Resource Families Home</i>	711	782	751	823	849
<i>Group Home/STRTP</i>	184	153	130	135	139
<i>Foster Family Agencies</i>	343	306	311	365	377
<b>Adoption Assistance</b>	2,177	2,187	2,171	2,149	2,224
<b>CalFresh</b>	47,629	48,313	52,777	56,965	51,269
<i>CalFresh Dollars</i>	\$13,195,820	\$19,260,747	\$25,608,028	\$28,775,954	\$21,572,035
<b>General Assistance</b>	524	234	233	270	539
<i>General Assistance Dollars</i>	\$49,760	\$23,517	\$19,637	\$34,167	\$62,500
<b>In-Home Supportive Services</b>	6,973	7,750	7,908	8,800	9,108
<b>Medi-Cal</b>	114,854	124,649	135,186	141,024	126,922
<b>Refugee Cash Assistance</b>	2	3	28	20	13
<b>Temporary Homeless Shelter</b>	1,611	1,069	1,389	1,747	1,791

*Note: Workload Data represents average cases and dollar amounts per month.*

*\*Restated*

# 5053900000—Mary Graham Children’s Shelter

## Human Services

Chris Woods, Human Services Director  
[www.sjchsa.org/](http://www.sjchsa.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$6,035,776	\$7,277,226	\$9,428,356	\$9,428,356	\$2,151,130
Services & Supplies	1,293,993	2,819,163	2,850,162	2,850,162	30,999
Centrally-Budgeted Expenses	297,163	430,996	614,053	614,053	183,057
Capital Expenditures	154,044	380,000	1,545,000	1,545,000	1,165,000
Total Expenditures	\$7,780,976	\$10,907,385	\$14,437,571	\$14,437,571	\$3,530,186
Expenditure Reimbursements	(398,841)	(600,500)	(600,500)	(600,500)	0
Total Appropriations	\$7,382,135	\$10,306,885	\$13,837,071	\$13,837,071	\$3,530,186
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$4,497,074	\$6,383,172	\$8,017,972	\$8,017,972	\$1,634,800
Total Revenues	\$4,497,074	\$6,383,172	\$8,017,972	\$8,017,972	\$1,634,800
<b>Net County Cost</b>	\$2,885,061	\$3,923,713	\$5,819,099	\$5,819,099	\$1,895,386
<b>Allocated Positions</b>	49.0	76.0	76.0	76.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	13.7	3.7	3.7	3.7	0.0
<b>Total Staffing</b>	62.7	79.7	79.7	79.7	0.0

## Purpose

Mary Graham Children’s Shelter (MGCS) provides temporary protective custody and services to children alleged to be abused or neglected and who come within the jurisdiction of the Juvenile Court as dependents. The Welfare and Institutions Code and the California Code of Regulations, Title 22, mandate the Shelter’s services, which include food, clothing, health care, education, safety, supervision, counseling, recreation, and access to religious services.

## Major Budget Changes

### Salaries & Employee Benefits

- \$683,359 Salary and benefits adjustments.
- \$1,325,004 Full-year cost of thirteen positions added midyear 2022-2023.
- \$131,378 Add one HSA Staff Analyst I-II.
- (\$68,611) Delete one Housekeeping Service Worker.
- \$80,000 Increase in overtime.

### Services & Supplies

- \$16,520 Increase in furniture expenses.

- \$15,000 Increase in food costs.
- \$10,000 Increase in kitchen and laundry equipment costs.
- \$8,000 Increase in utility costs.
- (\$16,521) Decrease in small tools and instrument costs.

### Centrally-Budgeted Expenses

- \$14,219 Increase in data processing charges.
- \$11,405 Increase in Workers’ Compensation and Casualty insurance costs.
- \$157,433 Cost Allocation Plan adjustment.

# 5053900000—Mary Graham Children's Shelter

## Human Services

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### Capital Expenditure - Equipment

- \$120,000 Reconfigure 20 workstations.
- \$100,000 Heater replacement.

### Capital Expenditures - Structures & Improvements

- \$750,000 Perimeter fence improvements.
- \$500,000 Badge access system installation.
- \$75,000 General building maintenance.

### Revenues

- \$1,620,920 Increase in State reimbursements due to the currently eligible population.

## Program Discussion

The 2023-2024 recommended budget for Mary Graham Children's Shelter (MGCS) totals \$14,437,571, which is an increase of \$3,530,186 from the 2022-2023 adjusted budget.

The Board of Supervisors approved the addition of one Shelter Supervisor I position and twelve Shelter Counselor I-II positions on January 10, 2023 (R-23-4). For 2023-2024, one HSA Staff Analyst I/II position is included in the recommended budget and one Housekeeping Service Worker position has been deleted.

### Continuum of Care Reform (CCR)

On January 1, 2016, Assembly Bill (AB) 403 codified the Continuum of Care Reform (CCR), with full implementation on January 1, 2017. CCR is intended to advance California's goal of limiting the use of long-term group home care by increasing the placement of youth in family settings. For youth who are not ready to be placed with families, CCR provides places where they can receive short-term intensive treatment and services, as well as placement and treatment options for youth in foster care. As a Temporary Shelter Care Facility licensed by the California Department of Social Services (CDSS), Community Care Licensing Division (CCLD), children are expected to stay no longer than 10 calendar days at MGCS. For any stay that exceeds 10 calendar days, a written report must be submitted to CDSS within 24 hours, outlining the reasons and circumstances for the extended stay. The law also requires an assessment to be completed prior to the placement of any child in the Foster Care System. To expedite the placement process, MGCS performs assessments prior to placing children into care.

To meet statutory deadlines, MGCS holds Placement Meetings twice a week with Child Protective Services (CPS) and Behavioral Health Services staff. This effort has resulted in a reduction of the average daily population at MGCS from a high of 37 children in 2015-2016 to approximately 15 children during 2022-2023.

### Emergency Relative Placement Assessments

In-lieu of placement at MGCS, Shelter Social Workers perform Emergency Relative Placement Assessments (ERPA) to place children with approved relatives until permanent housing can be arranged. The Shelter Social Workers are available during every weekday shift to ensure they can perform the ERPA immediately upon a child's arrival. Shelter Social Workers engage with children and assist the transition to their next placement. They attempt to establish a rapport with the child and share the information they gather with the families and agencies caring for them. This practice increases the chance of success in the new placement.

Changes in procedures, including the ERPA process, allow MGCS to transition most children from the Shelter and into the Foster Care System within one or two days of their arrival. Children that stay longer at MGCS typically require specific accommodations for their mental health challenges, behavioral issues, medical conditions, developmental disabilities, and/or a history of trauma, abuse, or neglect. While in the care of MGCS, these children often require additional services and 1:1 supervision to better serve their needs.

### Family First Prevention Services Act (FFPSA)

The Family First Prevention Services Act (FFPSA) became Federal law in 2018. California implemented FFPSA Part IV on October 1, 2021. It requires a Qualified Individual to assess foster youth prior to placing them in a Short-Term Residential Therapeutic Program (STRTP) facility. The Social Worker is required to provide additional documentation and obtain Court approval within 60 days of placing a youth in a STRTP. Because of this new Federal requirement, there may be a delay in placing youth with complex needs.

### Facility

MGCS is a 24 hours a day, 7 days per week facility that includes two residential cottages with two separate living pods in each cottage. The residential cottages are utilized according to the current needs of the children in care.

The 2023-2024 recommended budget includes \$500,000 for the installation of a badge card access system. The MGCS facility also includes:

# 5053900000—Mary Graham Children’s Shelter

## Human Services

- **Child Advocacy Center** – The Center provides comprehensive services for child victims of sexual abuse and serves as a pediatric medical clinic for MGCS residents and local foster youth. The Center provides a safe and respectful location for the San Joaquin County Sexual Assault Response Team’s emergency evaluations, 24 hours a day, 7 days per week for child and adult victims.
- **Walter Britten Visitation Center** – Families with children in the child welfare system may visit daily under the guidelines set forth by social workers and the courts. The Walter Britten Visitation Center provides a safe space for these visits.
- **San Joaquin County Office of Education’s (SJCOE) Dorothy Biddick School** – The School shares its site and buildings with MGCS. The School offers many options for activities and collaboration, and facilitates the provision of comprehensive and integrated programs. The SJCOE ONE School (Field of Dreams) utilizes two classrooms for community and on-site elementary school children. The collaborative efforts are aimed at providing cost-effective services to MGCS residents and improving the likelihood they will develop into healthy individuals.

MGCS is a valuable resource in the system of care for youth in the County. Approximately 600 children are assessed or receive services at the facility annually. Many children are housed at the Shelter until they can be assessed and placed in an appropriate setting.

County Child Welfare Agencies, like HSA, struggle to secure appropriate therapeutic placements for youth who have a need for more intensive services and supports, which are provided in a STRTP. State and Federal legislation and policy changes have reduced the number of available placement options for youth with the most severe needs. On January 1, 2017, there were nine group homes in San Joaquin County with a total of 154 beds. As of February 1, 2023, there are three STRTPs with 28 beds.

### Plan of Correction

On November 3, 2022, the CDSS CCLD issued a Plan of Correction (POC) to HSA. The POC required a Non-Compliance Conference between CCLD and San Joaquin County staff to address and correct deficiencies cited at MGCS. The POC required enhanced staffing levels to provide increased supervision to youth, additional specialized training for staff on various subjects, improved documentation and communication, and enhanced clinical evaluations and assessments.

The POC is a two-year compliance plan and includes additional in-person visits from CCLD Program Analysts. In addition to these requirements, the HSA leadership team continues to work in collaboration with CCLD to meet or exceed the requirements of the POC. CDSS, County staff, and other system of care partners continue to participate in Technical Assistance conferences to address the specific and complex needs of individual youth in care when existing resources and strategies have been exhausted.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021*	2021-2022	2022-2023	2023-2024
<i>Children Provided Care **</i>	476	458	504	591	610
<i>Average Daily Population provided care</i>	9	16	18	15	15
<i>Average Length of Stay (Days)**</i>	10	11	19	20	20

*\*Restated*

*\*\*Figure includes services for individuals provided multiple occurrences of care throughout the year.*

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## Human Services

Jerome C. Wilverding, County Administrator  
[www.sigov.org/department/cao](http://www.sigov.org/department/cao)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Services & Supplies	\$3,551,030	\$100,000	\$0	\$0	(\$100,000)
Other Charges & Uses	13,818,208	2,335,212	5,420,062	2,723,327	388,115
Total Expenditures	\$17,369,238	\$2,435,212	\$5,420,062	\$2,723,327	\$288,115
Expenditure Reimbursements	1,155,538	0	0	0	0
Total Appropriations	\$18,524,776	\$2,435,212	\$5,420,062	\$2,723,327	\$288,115
<b>Earned Revenues By Source</b>					
Operating Transfers In	\$3,679,997	\$239,000	\$110,000	\$100,000	(\$139,000)
Total Revenues	\$3,679,997	\$239,000	\$110,000	\$100,000	(\$139,000)
Net County Cost	\$14,844,779	\$2,196,212	\$5,310,062	\$2,623,327	\$427,115

## Purpose

The Community Services budget provides funding contributions to non-County organizations for various community services. Funding for these programs is a Board of Supervisors' policy matter, and is reviewed annually as part of the budget process.

## Major Budget Changes

### Services & Supplies

- (\$100,000) Decrease in carryover for Family COVID Assistance Grants (FCAG) from 2021-2022.

### Other Charges

- \$388,115 Increase in funding to various non-County organizations.

### Operating Transfers In

- (\$100,000) Decrease in revenue for FCAG.
- (\$39,000) Decrease in revenue from the Domestic Violence Fund (#15304).

## Program Discussion

The 2023-2024 recommended budget for Community Services totals \$2,723,327, which is an increase of \$288,115 from the 2022-2023 adjusted budget. This budget provides funding to 26 non-County organizations.

For 2023-2024, the County Administrator's Office (CAO) provided guidance documents and an application to agencies requesting funding from the County. The guidance specifies

that funds should not be used to provide regular operating cost functions for the organization and should be considered as a one-time and not as a regular source of revenue for planning purposes. Agencies are required to include the following information:

- Demonstrate how requested funding will address one or more of the 2022-2023 through 2024-2025 Board Strategic Priorities;
- Organization's operating budget and financials;
- Other County funding received;
- Other non-County governmental funding received;
- Programmatic spending plans; and
- Performance-based metrics used in the evaluation of the projected outcomes.

### The Amelia Ann Adams Whole Life Center

The 2023-2024 recommended budget includes partial funding in the amount of \$79,800 for the Amelia Ann Adams Whole Life Center. Recommended funding will support videographer services to document success stories, the purchase of a van to transport program participants, and materials associated with several programs that focus on case management, leadership development, and transformational healing services within the County. It is recommended the organization establish partnerships within the community and

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## Human Services

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seek other funding or support of in-kind services for the remaining \$120,100 in the request.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities through the improvement of juvenile system of care and enhancing quality of life.

### **Bread of Life**

The 2023-2024 recommended budget includes partial funding in the amount of \$115,700 for the Bread of Life organization. Recommended funding will support the purchase of a refrigerated sprinter van to expand the organization's services throughout the County. Funding will ensure the continuity of food distribution throughout 40 locations within the County. Requested funding in the amount of \$4,300 was considered to be operating cost functions and does not qualify for this type of funding.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and expanding small business growth.

### **CeliaWay Foundation, Inc.**

The 2023-2024 recommended budget includes \$174,000 for the CeliaWay Foundation, Inc. Recommended funding will support American Disability Act upgrades to the Hunter Street House and the purchase of a van to transport program participants.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by providing adequate resources for public safety and criminal justice.

### **Child Abuse Prevention Council (CAPC)**

The 2023-2024 recommended budget includes \$32,000 for the Child Abuse Prevention Council. Recommended funding will support the purchase and implementation of the organization's case management system.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by improving organizational capacity through digitization and automation of case files.

### **Children's Home of Stockton**

The 2023-2024 recommended budget includes \$200,000 for the Children's Home of Stockton. Recommended funding will support the organization's Transition Aftercare program which provides behavioral health services in the form of short-term crisis management.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by supporting participants' quality of life and promoting the expansion of behavioral health clinicians and services.

### **Compassion Residio Services, Inc.**

The 2023-2024 recommended budget includes \$124,645 for the Compassion Residio Services, Inc. organization. Recommended funding will support the setup of a new housing unit for aging veterans, the purchase of a van to transport program participants, and acquire two generators for emergencies.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and expanding unsheltered bed capacity.

### **Congregation of Zion**

The 2023-2024 recommended budget includes partial funding in the amount of \$25,000 for the Congregation of Zion community organization. Recommended funding will support the setup of a computer lab for an after school program. Programming provided will focus on youth in grades 5<sup>th</sup> – 12<sup>th</sup> with an emphasis on interpersonal skill development, college preparedness, and conflict resolution. It is recommended the organization establish partnerships within the community and seek other funding or support of in-kind services for the remaining \$95,000 in the request.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and improving juvenile system of care.

### **Delta Humane Society**

The 2023-2024 recommended budget includes partial funding in the amount of \$254,400 for the Delta Humane Society animal shelter. Recommended funding will support the purchase and outfitting of a truck and trailer, and supplies to provide a mobile animal surgical hospital. Requested funding in the amount of \$243,760 was considered to be operating cost functions and does not qualify for this type of funding.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and expanding small business growth.

### **Delta Sculling Center**

The 2023-2024 recommended budget includes \$66,412 for the Delta Sculling Center. Recommended funding will support the construction and design of the organization's office space and the purchase of a four-person sculling boat.

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## Human Services

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The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by increasing the organization's capacity and expanding small business growth.

### **Empowering Marginalized Asian Communities (EMAC)**

The 2023-2024 recommended budget includes partial funding in the amount of \$92,000 for the Empowering Marginalized Asian Communities organization. Recommended funding will support the development of a media campaign for the hate crime reporting tool and hotline, and program materials. Requested funding in the amount of \$8,000 was considered to be operating cost functions and does not qualify for this type of funding.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by providing adequate resources for public safety and enhancing quality of life.

### **Equity Alliance Group, Inc.**

The 2023-2024 recommended budget includes partial funding in the amount of \$32,000 for the Equity Alliance Group, Inc. Recommended funding will support grant writing services, office equipment, and marketing and advertising. It is recommended the organization establish partnerships within the community and seek other funding or support of in-kind services for the remaining \$168,000 in the request.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing economic development through the expansion of small business growth.

### **Escalon Strong**

The 2023-2024 recommended budget includes partial funding in the amount of \$42,500 for the Escalon Strong organization. Recommended funding will support the purchase of mobility scooters for seniors with limited mobility and materials needed for fix it eviction repairs. Requested funding in the amount of \$157,500 was considered to be home improvements and does not qualify for this type of funding.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and preventing homelessness within the senior community of Escalon.

### **Five Keys Schools & Programs**

The 2023-2024 recommended budget includes \$99,834 for the Five Keys Schools and Programs organization.

Recommended funding will support the purchase of program materials, supplies, and equipment needed to upgrade the organization's meeting space.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and preventing homelessness.

### **Gospel Center Rescue Mission, Inc. (GCRM)**

The 2023-2024 recommended budget includes partial funding in the amount of \$90,000 for the Gospel Center Rescue Mission. Recommended funding will support the addition of an alternative power source for two key buildings on the GCRM campus. Requested funding in the amount of \$60,000 lacked sufficient information and is not recommended.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by providing adequate resources for public safety and enhancing quality of life.

### **Grand Foundation (Arts Leadership Alliance)**

The 2023-2024 recommended budget includes \$70,000 for the Grand Foundation organization. Recommended funding will support community access programs, art education and outreach, and art education for special needs members of the community.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by expanding small business growth and enhancing the community's quality of life.

### **Haven of Peace**

The 2023-2024 recommended budget includes \$55,000 for the Haven of Peace organization. Recommended funding will support the construction of a roadside easement for the organization's women's shelter.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by effectively managing one-time funds and improving quality of life.

### **Hoover Tyler Little League**

The 2023-2024 recommended budget includes \$123,183 for the Hoover Tyler Little League. Recommended funding will support the replacement costs of field three, its fencing, and bleachers for the baseball programs offered to ages 4 to 14.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and improving public safety.

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## Human Services

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### **Inspire Me, Inc.**

The 2023-2024 recommended budget includes \$12,000 for the Inspire Me, Inc. organization. Recommended funding will support materials for wellness camps and workshops for teens covering topics such as mental health, nutrition, and economic security.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and expanding small business growth.

### **Mary Magdalene Community Services**

The 2023-2024 recommended budget includes \$109,232 for the Mary Magdalene Community Services organization. Recommended funding will support repairs to the organization's building, upgrades to the conference room, and the purchase of a van and furniture.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and improving juvenile system of care.

### **Oasis City Center**

The 2023-2024 recommended budget includes \$316,595 for the Oasis City Center. Recommended funding will support the outfitting of a mobile soup kitchen and the expansion of the organization's outreach programs and partnerships.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and expanding small business growth.

### **Prevail (Women's Center)**

The 2023-2024 recommended budget includes \$227,000 for the Prevail organization. The amount of \$100,000 is recommended to be funded from the Domestic Violence General Fund Special Account (#15304), and \$127,000 from the General Fund. Funding from the Domestic Violence fund will support crisis intervention services while other funding will be used for roof repairs and the replacement of flooring and gates.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and public safety.

### **St. Basil's Greek Orthodox Church of Stockton**

The 2023-2024 recommended budget includes \$125,000 for the St. Basil's Greek Orthodox Church of Stockton.

Recommended funding will support one third of the costs to build a shade structure for community events.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and public safety.

### **Uplift All Foundation**

The 2023-2024 recommended budget includes \$137,878 for the Uplift All Foundation. Recommended funding will support the purchase and outfitting of a new van for the foundation's Loads of Hope mobile laundry and shower services.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and public safety.

### **Visionary Home Builders**

The 2023-2024 recommended budget includes partial funding in the amount of \$81,800 for the Visionary Home Builders organization. Recommended funding will support the purchase of desks, supplies, and materials for art therapy workshops. It is recommended the organization secure other funding to support the remaining \$118,200 in the request.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and public safety.

### **World of Wonders Science Museum**

The 2023-2024 recommended budget includes \$12,400 for the World of Wonders Science Museum. Recommended funding will support the purchase of a ball wall exhibit.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing COVID recovery and quality of life.

### **YMCA of San Joaquin**

The 2023-2024 recommended budget includes \$24,948 for the Young Men's Christian Association (YMCA) of Stockton. Recommended funding will support the purchase of materials and supplies for the after school program aimed at improving students' social and emotional learning.

The work of the organization addresses the Board's 2022-2023 through 2024-2025 Strategic Priorities by enhancing quality of life and public safety.



# 5054000000—Community Services

## Human Services

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### Unfunded Requests

#### A to Z Psychotherapy

A funding request totaling \$88,082 was submitted for program support consisting of salaries and benefits and operational costs. Based on the County's guidance, salaries and benefits, rent, utilities, internet, and travel are considered operating cost functions and do not qualify for this type of funding.

The funding request of \$88,082 has not been included in the 2023-2024 recommended budget.

#### American Seva Foundation

A funding request totaling \$3,060 was submitted to provide food bags to underserved communities in the Lathrop area. The application did not contain the required information and was disqualified.

The funding request of \$3,060 has not been included in the 2023-2024 recommended budget.

#### Blue Angel of Hope

A funding request totaling \$50,000 was submitted to provide support to law enforcement communities. The application did not contain the required information and was disqualified.

The funding request of \$50,000 has not been included in the 2023-2024 recommended budget.

#### Breaking Barriers

A funding request totaling \$200,000 was submitted to provide education services to youth and adults. The application did not contain the required information and was disqualified.

The funding request of \$200,000 has not been included in the 2023-2024 recommended budget.

#### Electric Auto Association San Joaquin Valley

A funding request totaling \$2,500 was submitted for the support of program materials needed to host an event for electric cars. The application was disqualified due to lack of sufficient information.

The funding request of \$2,500 has not been included in the 2023-2024 recommended budget.

#### Fruitful Cherry

A funding request totaling \$10,850 was submitted for the support of program materials, supplies, and workshops needed to host a retreat for women struggling with mental,

emotional, and physical wellness. The application was disqualified due to lack of sufficient information.

The funding request of \$10,850 has not been included in the 2023-2024 recommended budget.

#### Gods Church City of Stockton

A funding request totaling \$250,000 was submitted for the support of building repairs and upgrades. The application was disqualified due to lack of financial information.

The funding request of \$250,000 has not been included in the 2023-2024 recommended budget.

#### I Care Maternity Home

A funding request totaling \$199,800 was submitted for the set-up of housing for pregnant homeless women. The application was disqualified due to lack of financial information.

The funding request of \$199,800 has not been included in the 2023-2024 recommended budget.

#### Mims Corner

A funding request totaling \$200,000 was submitted to support the purchase of a building to store the organization's donations. The application was disqualified due to lack of project and financial information.

The funding request of \$200,000 has not been included in the 2023-2024 recommended budget.

#### New Genesis Housing Development

A funding request totaling \$20,000 was submitted for the support of a mobile vaccine clinic in the Victory Park area. The application was disqualified due to lack of project and financial information.

The funding request of \$20,000 has not been included in the 2023-2024 recommended budget.

#### Oracles of Truth

A funding request totaling \$59,989 was submitted for the support of Whole Person Care administration services. The funding request is to support the administration of programs and services similar to those currently offered by the County. Based on the County's guidance, these types of services are considered operating cost functions and do not qualify for this type of funding.

The funding request of \$59,989 has not been included in the 2023-2024 recommended budget.

# **5054000000—Community Services**

## **Human Services**

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### **Public Health Advocates**

A funding request totaling \$105,994 was submitted for the support of program materials, supplies, and space need for workshops and events. The application was disqualified due to lack of adequate financial information.

The funding request of \$105,994 has not been included in the 2023-2024 recommended budget.

### **Raising Youth Resilience**

A funding request totaling \$200,000 was submitted for the support of personnel to assist in the development of the organization's fundraising project. Based on the County's guidance, these types of expenses are considered operating cost functions and do not qualify for this type of funding.

The funding request of \$200,000 has not been included in the 2023-2024 recommended budget.

### **Tracy Chamber of Commerce**

A funding request totaling \$25,000 was submitted for the repairs to the roof of the organization's building. The application was disqualified due to lack of project and financial information.

The funding request of \$25,000 has not been included in the 2023-2024 recommended budget.

### **Tracy Earth Project**

A funding request totaling \$6,600 was submitted for the purchase and planting of 100 trees in the City of Tracy area. The application was disqualified due to lack of project information.

The funding request of \$6,600 has not been included in the 2023-2024 recommended budget.

### **Victory In Praise Church**

A funding request totaling \$300,000 was submitted for the purchase of a van and fork lift, and upgrades to conference rooms and classrooms. The application was disqualified due to lack of project and financial information.

The funding request of \$300,000 has not been included in the 2023-2024 recommended budget.

## **Fund Balance**

### **Domestic Violence Fund**

The Domestic Violence General Fund Special Account (#15304) revenue is derived primarily from marriage license fees and domestic violence fines, and is dedicated to domestic violence programs. As of March 31, 2023, the fund balance was \$236,889. Currently, the fund partially supports one non-County organization, Prevail (Women's Center).

# 5054000000—Community Services

## Human Services

### Contributions to Non-County Organizations

	2021-2022 Approved Budget	2022-2023 Approved Budget	2023-2024		Unfunded Requests
			Requested	Recommended	
<i>A to Z Psychotherapy</i>	\$0	\$0	\$88,082	\$0	\$88,082
<i>African American Chamber of San Joaquin Foundation</i>	0	39,450	0	0	0
<i>Amelia Ann Adams Whole Life Center</i>	0	43,469	199,900	79,800	120,100
<i>American Seva Foundation</i>	0	2,000	3,060	0	3,060
<i>Art Expressions*</i>	2,535	0	0	0	0
<i>Be Smooth, Inc.</i>	0	13,600	0	0	0
<i>Blue Angel of Hope</i>	0	0	50,000	0	50,000
<i>Bread of Life</i>	170,000	220,000	120,000	115,700	4,300
<i>Breaking Barriers</i>	0	0	200,000	0	200,000
<i>CeliaWay Foundation, Inc.</i>	0	0	174,000	174,000	0
<i>Chest of Hope, Inc.</i>	0	103,930	0	0	0
<i>Child Abuse Prevention Council</i>	98,107	24,563	32,000	32,000	0
<i>Children's Home of Stockton</i>	161,266	188,957	200,000	200,000	0
<i>Clinton McCausland American Legion Post 190</i>	175,000	0	0	0	0
<i>Community Partnership for Families for San Joaquin (CPFSJ)</i>	152,234	110,000	0	0	0
<i>Compassion Residio Services, Inc.</i>	0	0	124,645	124,645	0
<i>Congregation of Zion</i>	0	0	120,000	25,000	95,000
<i>Delta Humane Society</i>	0	0	498,160	254,400	243,760
<i>Delta Sculling Center</i>	0	48,000	66,412	66,412	0
<i>Electric Auto Association San Joaquin Valley</i>	0	2,500	2,500	0	2,500
<i>Empowered Men Built to Win</i>	0	60,000	0	0	0
<i>Empowering Marginalized Asian Communities</i>	0	76,000	100,000	92,000	8,000
<i>Equity Alliance Group, Inc.</i>	0	0	200,000	32,000	168,000
<i>Escalon Strong</i>	0	0	200,000	42,500	157,500
<i>First Tee-San Joaquin</i>	0	10,000	0	0	0
<i>Five Keys Schools &amp; Programs</i>	0	0	99,834	99,834	0
<i>Fruitful Cherry</i>	0	0	10,850	0	10,850

# 5054000000—Community Services

## Human Services

### Contributions to Non-County Organizations

	2021-2022 Approved Budget	2022-2023 Approved Budget	2023-2024		Unfunded Requests
			Requested	Recommended	
<i>Gods Church City of Stockton</i>	0	0	250,000	0	250,000
<i>Goodwill Industries of San Joaquin Valley</i>	0	197,500	0	0	0
<i>Gospel Center Rescue Mission, Inc.</i>	0	0	150,000	90,000	60,000
<i>Grand Foundation (Arts Leadership Alliance)</i>	0	0	70,000	70,000	0
<i>Haven of Peace</i>	125,300	0	55,000	55,000	0
<i>Hoover Tyler Little League</i>	0	60,000	123,183	123,183	0
<i>I Care Maternity Home</i>	0	0	199,800	0	199,800
<i>Inspire Me, Inc.</i>	0	1,842	12,000	12,000	0
<i>Jene Wah*</i>	0	20,304	0	0	0
<i>Lodi House</i>	0	80,178	0	0	0
<i>LOEL Senior Center</i>	0	200,000	0	0	0
<i>Mary Magdalene Community Services</i>	0	0	109,232	109,232	0
<i>Mexican Heritage Center &amp; Gallery*</i>	8,000	25,000	0	0	0
<i>Mims Corner</i>	0	25,244	200,000	0	200,000
<i>New Genesis Housing Development</i>	0	0	20,000	0	20,000
<i>Oasis City Center</i>	197,088	86,350	316,595	316,595	0
<i>Operation Dez Strong, Inc.</i>	0	50,000	0	0	0
<i>Oracles of Truth</i>	0	0	59,989	0	59,989
<i>Parents by Choice</i>	0	50,000	0	0	0
<i>People's Empowerment Center</i>	0	54,220	0	0	0
<i>Prevail (Women's Center)</i>	225,000	229,000	227,000	227,000	0
<i>Public Health Advocates</i>	0	0	105,994	0	105,994
<i>Raising Youth Resilience</i>	0	0	200,000	0	200,000
<i>St. Basil's Greek Orthodox Church of Stockton</i>	0	0	125,000	125,000	0

# 5054000000—Community Services

## Human Services

### Contributions to Non-County Organizations

	2021-2022 Approved Budget	2022-2023 Approved Budget	2023-2024		Unfunded Requests
			Requested	Recommended	
<i>Three Seeds Organization</i>	0	50,000	0	0	0
<i>Tracy Boys &amp; Girls Club</i>	0	10,000	0	0	0
<i>Tracy Chamber of Commerce</i>	0	0	25,000	0	25,000
<i>Tracy Earth Project</i>	0	0	6,600	0	6,600
<i>Tracy Interfaith Ministries</i>	60,000	60,000	0	0	0
<i>Transition U</i>	100,000	11,409	0	0	0
<i>United Way of San Joaquin County</i>	0	100,000	0	0	0
<i>Uplift All Foundation</i>	0	127,000	137,878	137,878	0
<i>Victory In Praise Church</i>	0	0	300,000	0	300,000
<i>Visionary Home Builders</i>	0	0	200,000	81,800	118,200
<i>World of Wonders Science Museum</i>	41,865	0	12,400	12,400	0
<i>YMCA of San Joaquin</i>	0	0	24,948	24,948	0
<b>Total County Contributions</b>	\$1,516,395	\$2,380,516	\$5,420,062	\$2,723,327	\$2,696,735
<b>Less Trust Fund Contribution</b>	(116,000)	(139,000)	(110,000)	(100,000)	N/A
<b>Total Net County Cost</b>	<b>\$1,400,395</b>	<b>\$2,241,516</b>	<b>\$5,310,062</b>	<b>\$2,623,327</b>	N/A

\*Included in the Cultural Services budget narrative (#7070800000).

# 5054101000—Aging & Community Services

## Human Services

Chris Woods, Human Services Director  
[www.sjchsa.org/](http://www.sjchsa.org/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$6,189,699	\$7,596,520	\$8,291,171	\$8,291,171	\$694,651
Services & Supplies	6,121,500	11,034,836	9,707,146	9,707,146	(1,327,690)
Centrally-Budgeted Expenses	437,323	280,038	364,994	364,994	84,956
Other Charges & Uses	26	5,000	2,100	2,100	(2,900)
Capital Expenditures	0	69,622	60,000	60,000	(9,622)
Total Expenditures	\$12,748,548	\$18,986,016	\$18,425,411	\$18,425,411	(\$560,605)
Expenditure Reimbursements	(554,020)	(685,089)	(994,030)	(994,030)	(308,941)
Total Appropriations	\$12,194,528	\$18,300,927	\$17,431,381	\$17,431,381	(\$869,546)
<b>Earned Revenues By Source</b>					
Interest/Rents	\$11,336	\$10,775	\$10,775	\$10,775	\$0
Aid From Other Governments	8,847,545	11,709,060	12,263,053	12,263,053	553,993
Miscellaneous Revenues	47,888	40,000	39,500	39,500	(500)
Operating Transfers In	175,027	3,179,981	1,148,417	1,148,417	(2,031,564)
Total Revenues	\$9,081,796	\$14,939,816	\$13,461,745	\$13,461,745	(\$1,478,071)
<b>Net County Cost</b>	\$3,112,732	\$3,361,111	\$3,969,636	\$3,969,636	\$608,525
<b>Allocated Positions</b>	58.0	60.0	65.0	65.0	5.0
<b>Temporary (Full-Time Equivalent)</b>	19.3	22.6	20.0	20.0	(2.6)
<b>Total Staffing</b>	77.3	82.6	85.0	85.0	2.4

## Purpose

The Aging and Community Services (ACS) budget administers Federal, State, private, and local funds allocated for services to adults age 60 and over, adults with disabilities, and low-income individuals and families.

Aging Services includes direct services for older adults such as ombudsman, in-home services, social day care, legal services, health services, congregate meals, Meals on Wheels, and long-term case management.

Community Services includes direct anti-poverty services such as translation and interpretation, assistance with forms, employment and client advocacy, recreation activities for low-income youth and older adults, food distribution, payment of water and energy bills, and home weatherization.

## Major Budget Changes

### Salaries & Employee Benefits

- \$102,948 Add a Social Worker I-II.
- \$83,985 Add an Energy Program Specialist.
- (\$84,674) Delete a vacant Office Supervisor.
- \$470,534 Salary and benefits adjustments.
- \$49,340 Increase in overtime costs.
- \$242,964 Add three Senior Office Assistants.
- (\$286,913) Decrease in extra-help costs.
- \$116,467 Add an Accountant I.

# 5054101000—Aging & Community Services

## Human Services

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### Services & Supplies

- \$640,249 Increase in subcontracts for one-time costs related to legal services for older adults, nutrition infrastructure, and improving access to technology.
- \$638,700 Increase in maintenance costs for community centers due to projects to replace lighting and flooring.
- \$106,940 Increase in Area Plan subcontracts for client items and services for older adults.
- (\$1,064,207) Decrease in food purchase costs related to the Food for You Program.
- (\$582,854) Decrease in ARPA-funded Community Center repairs and upgrades as a result of completed projects.
- (\$543,335) Decrease in advertising needs related to one-time funding.
- (\$446,335) Decrease in professional services and client items related to one-time funding.

### Centrally-Budgeted Expenses

- \$12,163 Increase in rents and leases of automated equipment.
- \$66,457 Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$60,000 Purchase one replacement vehicle assigned to the Food for You program.

### Expenditure Reimbursements

- \$356,516 Increase in cost reimbursements for ARPA-funded community center upgrades.
- \$99,016 Increase in CalWORKs reimbursements.
- (\$146,591) Decrease in reimbursable expenses to other County departments.

### Revenues

- \$2,294,292 Increase in State revenue for older adult programs for nutrition, family caregivers, social interaction, and legal services.
- (\$1,725,299) Decrease in one-time Federal grant funds for utility assistance and Food For You.

### Operating Transfers In

- (\$2,031,564) Decrease in operating transfers related to one-time funding for older adults and a shift of ARPA-funded community center upgrades to expenditure reimbursements.

## Program Discussion

The 2023-2024 recommended budget for Aging & Community Services (ACS) totals \$18,425,411, which is a decrease of \$560,605 from the 2022-2023 adjusted budget.

The recommended budget includes six new positions to administer new and expanded funding in the Home Energy Assistance Programs and grants for older adults. The recommended budget also deletes one vacant Office Supervisor position.

The 2023-2024 recommended budget only includes funding that ACS has formally accepted. Should additional funding become available, the Human Services Agency will return to the Board of Supervisors during 2023-2024 to request the necessary budget adjustments.

### Aging Services

As the County's designated Area Agency on Aging, the Older Americans Act (OAA) funds the ACS Bureau. OAA and the Older Californians Act mandate a variety of services for adults age 60 and over. Services include Family Caregiver Support, Ombudsman Program, Congregate Meals, Meals on Wheels, Legal Services, Adult Day Care, Information and Assistance, and Disease Prevention/Health Promotion. State grants fund additional programs, including Fall Prevention.

ACS has built partnerships throughout the community to expand its core services. These partners currently include local and regional organizations, non-profit organizations, local government entities, and other County agencies.

# 5054101000—Aging & Community Services

## Human Services

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ACS provides the following programs:

- **Congregate Meals Program for Older Adults** – Congregate Meals, also known as Senior Lunch, provides older adults with a hot meal that meets United States Department of Agriculture (USDA) nutritional guidelines. ACS partners with San Joaquin General Hospital and Stockton Community Kitchen to prepare daily hot meals for adults age 60 and over. The Program funds 19 locations throughout the County. Congregate Meals serves food in Escalon, Lathrop, Lockeford, Lodi, Manteca, Ripon, Stockton, and Tracy.
- **Meals on Wheels Program for Older Adults** – Also known as home-delivered meals, this program provides frozen meals for homebound adults aged 60 and over, with meals delivered once a week.
- **Ombudsman Program** – Investigates reports of abuse or neglect, and advocates on behalf of residents of skilled nursing facilities, residential facilities for the elderly, assisted living, and adult day health care facilities. The program regularly monitors facilities and serves as a liaison between facility staff, residents, and families.
- **Case Management** – Provides support to adults age 60 and over who are living alone, and to non-paid caregivers aged 18 and over who are taking care of their older adult family members. Services include assessment, referrals, advocacy, transportation, home-maker services, assistance navigating health insurance, assistance obtaining needed equipment and supplies, coordinating respite hours, and identifying other resources that allow the older adult to remain safe in their home.
- **Information and Assistance** – Provides individuals with information and referrals to programs and resources that are available for older adults, caregivers, and disabled adults. ACS conducts community outreach throughout the year, and assistance is available through a helpline at: (209) 468-1104.
- **Fall Prevention** – Older adults have an increased risk of falling, which can cause serious injuries, such as broken bones or head injuries. These injuries can affect an individual's quality of life, making it more difficult to conduct everyday activities or live independently. ACS assesses clients for fall risk, provides information to reduce future falls, and evaluates homes to identify potential locations for ramps, grab bars, and other equipment. ACS also provides home modification services to prevent falls.

## Community Services/Centers

### Community Services

The Community Services program focuses on improving the quality of life for all ages, from youth to older adults. The Community Services Division offers the following programs:

- **Food for You Program** – Operating as the State-designated emergency food bank in the County, the Program receives surplus USDA, State, and donated food from local businesses. Food for You distributes food through the County's eight community centers, plus 13 other local distribution sites. The Program assists over 170,000 low-income persons annually and distributes more than three million pounds of food per year. The type and quantity of food provided to each household will vary depending on product availability, participation rate, and household size.
- **Weatherization Program** – The Weatherization Program can assist income-qualifying renters or owners by installing energy-saving measures and through repairs to homes, multi-unit dwellings, and mobile homes. Services may include repair or replacement of a refrigerator, stove, water heater, microwave, insulation, LED light bulbs, smoke and carbon monoxide detectors, shade screens, doors, weather-stripping, and other measures to improve the energy efficiency of the dwelling.

The Weatherization Program is funded by the Low-Income Home Energy Assistance Program (LIHEAP) and the Department of Energy-Weatherization Assistance Program.

- **Home Energy Assistance Programs** – ACS provides financial assistance to low-income households through the payment of utility bills such as gas, electricity, wood, propane, oil, and water. Those who are eligible for bill payment may also receive repair or replacement of home heating or cooling units. Along with the credit to their bill, clients will also receive valuable information about energy conservation and practical tips on how to save energy. The Home Energy Assistance Programs are funded by LIHEAP and the Low-Income Household Water Assistance Program.

### Community Centers

The County has strategically located its eight Community Centers near areas where residents may have a higher need for supportive services and city services are not nearby. The comprehensive array of services offered at the Centers



# 5054101000—Aging & Community Services

## Human Services

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support low-income individuals and families by providing the resources and opportunities necessary for them to become self-sufficient. Services provided include information and referral, assistance with forms, advice on assistance programs (e.g., CalWORKs, CalFresh, Medi-Cal), translation and interpreter services, health fairs, food assistance, congregate lunches, after-school programs, and recreation for youth and older adults.

Each Community Center is open from 8:00 a.m. to 5:00 p.m., Monday through Friday at the following locations:

Community Centers	Location
Boggs Tract Center	Stockton
Garden Acres Center	Stockton
Kennedy Center	Stockton
Larch Clover Center	Tracy
Lodi Center	Lodi
Northeast Center	Stockton
Taft Center	Stockton
Thornton Center	Thornton

The Centers located near schools serve as a location for youth to participate in after-school activities. Typically, activities are available year-round, with additional programming during the summer months.

- **Recreation Program** – The Program offers youth an opportunity to participate in seasonal sports such as basketball and flag football, and a year-round dance program. Older adult activities, such as walking groups and other exercise classes, are available to keep patrons invested in their health. The youth and older adult activities provide a free alternative to commercial exercise and sports activities.

- **Summer Youth Enrichment Program** – The Centers provide recreational and educational services to youth during the summer. Field trips, arts and crafts, intramural sports, motivational speakers, and summer reading programs provide positive activities for youth.
- **Summer Aquatics Program** – Community Services has completed repairs to the pool at the Kennedy Community Center, and it will reopen this summer. The Department is currently searching for an organization to run the program. The aquatics program will open Memorial Day and run until school resumes in the fall. Community Services offers recreational and instructional swimming as a constructive activity for the community.

## Fund Balance

### ACS Funds

ACS uses six General Fund Special accounts and Trust Funds to provide community services, and each is restricted to a specific purpose.

ACS is requesting to rename account #15309, from Senior Awareness Program to Older Adult Community Outreach. ACS created this trust account in 1983 to track donations and event expenditures for Senior Awareness Day, an older adult outreach event that was last held in 2019 in Stockton. In the future, the Department will hold community events throughout the County in partnership with cities and local municipalities. The existing balance will support community outreach events for older adults. This support may include outreach materials, imprinted items, and raffle or event items.

# 5054101000—Aging & Community Services

## Human Services

Aging & Community Services Fund Accounts	Fund	Balance as of March 31, 2023	Interest Bearing	Restricted
<b>General Fund Special Accounts</b>				
<b>Weatherization Materials</b> <i>Accounts for weatherization material cost. One-time funds were utilized to establish a beginning balance. The account is charged as materials are purchased and placed in inventory. Credit is provided as materials are consumed by the program.</i>	15302	\$93,247	No	Yes
<b>Older Adults Program</b> <i>Accounts for revenue advanced from the California Department of Aging. This account reimburses the General Fund for actual program expenses on a periodic basis.</i>	15306	\$625,371	Yes	Yes
<b>Community Action Agency – Donation</b> <i>Accounts for donations to County Community Centers and related expenditures of these discretionary funds.</i>	15307	\$158,048	No	Yes
<b>Senior Awareness Program</b> <i>Tracks donations made to the Department and event expenditures for community outreach events geared towards older adults.</i>	15309	\$51,535	Yes	Yes
<b>Trust Funds</b>				
<b>Department of Aging</b> <i>Accounts for revenue earned through operations of the aging and adult service programs.</i>	81872	\$492,047	No	Yes
<b>Ombudsman</b> <i>Administers donations made to the Department for Ombudsman Program.</i>	81896	\$17,128	No	Yes

# 5054101000—Aging & Community Services

## Human Services

### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Aging Services</b>					
<i>Clients Served <sup>1</sup></i>	15,375	19,900	21,343	21,720	21,900
<i>Congregate Meals <sup>2</sup></i>	134,020	355,857	130,875	107,136	108,220
<i>Meals on Wheels <sup>2</sup></i>	89,175	104,094	124,569	104,000	117,000
<i>In-Home Assistance Hours Served <sup>1</sup></i>	10,580	9,524	15,756	14,772	14,982
<i>Long-Term Case Management</i>	41	90	103	110	110
<i>Ombudsman Complaints Investigations <sup>1</sup></i>	608	456	1,206	1,200	1,200
<b>Community Services</b>					
<i>Anti-Crime <sup>1</sup></i>	780	807	808	858	860
<i>Clients Served (Unduplicated) <sup>1</sup></i>	12,553	9,688	9,381	9,550	9,600
<i>Food Assistance Households Served</i>	44,157	49,159	56,111	58,764	65,040
<i>Emergency Food &amp; Clothing <sup>1</sup></i>	2,471	2,719	2,483	2,704	2,700
<i>Units of Service Provided to Clients <sup>1</sup></i>	86,682	107,942	104,814	107,153	108,000
<b>Energy Programs</b>					
<i>Utility Payments <sup>3</sup></i>	5,719	5,717	5,319	5,893	7,163
<i>Weatherization Projects <sup>4</sup></i>	276	291	335	240	288

**Figures can include multiple services to individuals/households throughout the year.**

<sup>1</sup> This program was adversely impacted by the inability to provide in-person services due to the pandemic.

<sup>2</sup> Congregate and Home Delivered Meals were expanded during the pandemic. Congregate Meals included to-go servings in 2020-2021, doubling the number of meals provided to older adults.

<sup>3</sup> The Utility Assistance program received additional allocations of LIHEAP funding in 2023.

<sup>4</sup> The Department's 2022 Department of Energy (DOE) funding allocation was smaller than normal, which reduced the number of weatherized dwellings that year.

# 5055103000—Employment & Economic Development

## Human Services

Patricia Virgen, *EEDD Director*  
[www.sjworknet.org/](http://www.sjworknet.org/)

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$7,251,501	\$9,097,969	\$9,780,655	\$9,780,655	\$682,686
Services & Supplies	25,240,385	20,300,275	19,837,290	19,837,290	(462,985)
Centrally-Budgeted Expenses	401,714	432,719	604,887	604,887	172,168
Capital Expenditures	0	15,000	90,000	90,000	75,000
Total Expenditures	\$32,893,600	\$29,845,963	\$30,312,832	\$30,312,832	\$466,869
Expenditure Reimbursements	(5,439,823)	(3,804,969)	(4,964,590)	(4,964,590)	(1,159,621)
Total Appropriations	\$27,453,777	\$26,040,994	\$25,348,242	\$25,348,242	(\$692,752)
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$18,140,404	\$14,962,616	\$16,077,195	\$16,077,195	\$1,114,579
Charges For Services	248,851	674,328	565,941	565,941	(108,387)
Miscellaneous Revenues	206,272	404,050	470,623	470,623	66,573
Operating Transfers In	20,016,000	10,000,000	0	0	(10,000,000)
Fund Balance	(11,157,750)	0	8,234,483	8,234,483	8,234,483
Total Revenues	\$27,453,777	\$26,040,994	\$25,348,242	\$25,348,242	(\$692,752)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	71.0	77.0	77.0	77.0	0.0
<b>Temporary (Full-Time Equivalent)</b>	9.9	15.7	12.9	12.9	(2.8)
<b>Total Staffing</b>	80.9	92.7	89.9	89.9	(2.8)

## Purpose

The Employment and Economic Development Department (EEDD) provides employment training, education, and economic development services throughout the County. It serves as staff to the Workforce Development Board (WDB), San Joaquin County Economic Development Association (EDA), and the Revolving Loan Fund (RLF). Employment and training services for the California Work Opportunity and Responsibility to Kids Act (CalWORKs) Program are also provided under a cooperative agreement with the Human Services Agency (HSA).

Local Workforce Development Area (LWDA) levels of service must conform to standards established by law. EEDD is the designated administrative entity and is responsible for managing these functions and ensuring compliance with Federal and State program guidelines. The EEDD budget is primarily supported by Federal and State funds from the Workforce Innovation and Opportunity Act (WIOA), the CalWORKs Program, and special grants.

## Board Strategic Priorities 2022-2023 through 2024-2025

The Department's 2023-2024 recommended budget focuses on the implementation of the Board Strategic Priorities as adopted on May 24, 2022 (B-22-243). The following SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals have been developed in support of the Strategic Priorities:

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## Human Services

Organizational Capacity/Technology Utilization			
Improve Recruitment and Retention Rates	Current	Target	Deadline
➤ Improve office vacancy rate	25% as of April 30, 2023	15%	January 2024
Augment Digitization and Automation	Current	Target	Deadline
➤ Implement a process and provide ongoing training for staff to effectively digitize program application eligibility, case management, and performance-related documents in CalJOBS to eliminate hard copies	80% as of June 30, 2023	100%	January 2024
➤ Implement Track-It system to monitor Information Systems Division requests and completion of projects	50% as of June 30, 2023	100%	January 2024
Fiscal Optimization			
Effectively Manage One-Time Funds	Current	Target	Deadline
➤ Fully implement migration of financial management system to PeopleSoft	20% as of June 30, 2023	100%	June 2025
Economic Development			
Enhance COVID Recovery	Current	Target	Deadline
➤ Round 5 of Small Business Assistance Grant	0	300 Businesses	June 2024
➤ Provide \$5,000 Microbusiness grants to microbusinesses in the County	203 grants	316 grants	December 2022
➤ RAD Card (Round 4) to provide small business relief funds for COVID-19 recovery	212 Businesses as of June 30, 2022	450 Businesses	April 2023
Expand Small Business Growth	Current	Target	Deadline
➤ Complete and open the Small Business Concierge Center	50%	100%	June 2023
➤ Develop a Small Business Growth Academy combining resources from various County departments and community organizations to assist small businesses who are interested in growing or expanding by learning how to apply for funding	0	50 Businesses	December 2023

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## Human Services

Increase Transportation/Logistics/ Warehousing Businesses	Current	Target	Deadline
➤ 50% of program development of training for transportation, logistics, and warehousing – First cohorts started at the Manteca Adult Schools	50%	100%	September 2023

### Major Budget Changes

#### Salaries & Employee Benefits

- \$411,067 Salary and benefits adjustments.
- \$368,688 Full-year cost of four Employment Training Specialists I-II added midyear 2022-2023.
- \$196,593 Add a Deputy Director, Employment and Training.
- (\$197,911) Delete an EEDD Economic Development Director.
- \$8,104 Increase in overtime costs.
- (\$103,855) Decrease in extra-help.

#### Services & Supplies

- \$1,868,872 Increase in grant program costs for Prison to Employment (P2E) Grant and customer training.
- \$1,148,000 Increase in costs due to re-budgeting of Small Business Assistance Grant (SBAG) funds.
- (\$3,406,000) Decrease in costs due to completion of Relief Across Downtown (RAD) Card Program and California Microbusiness COVID-19 Relief Grant (MBCRG) Program.

#### Centrally-Budgeted Expenses

- \$95,351 Increase in data processing charges.
- \$44,583 Increase in Workers' Compensation and Casualty insurance costs.
- \$32,234 Cost Allocation Plan adjustment.

#### Capital Expenditures - Equipment

- \$90,000 Firewall equipment upgrade.

#### Expenditure Reimbursements

- \$1,015,049 Increase in reimbursement from Human Services Agency for Employment Works Program.
- \$88,874 Increase in reimbursement from Veterans Services Office for office space.

#### Revenues

- \$795,000 Increase in State revenue for P2E and Regional Equity and Recovery Partnership (RERP) grants.
- \$229,042 Increase in WIOA funding.

#### Operating Transfers In

- (\$10,000,000) Decrease in transfers for SBAG.

### Program Discussion

The 2023-2024 recommended budget for the Employment and Economic Development Department (EEDD) totals \$30,312,832, which is an increase of \$466,869 from the 2022-2023 adjusted budget.

#### Increased Staffing

On November 29, 2022, the Board of Supervisors approved the addition of four Employment Training Specialists I-II (R-22-217). The additional positions will support the California Work Opportunity and Responsibility to Kids Act (CalWORKs) Job Search/Job Readiness Program by providing training for CalWORKS clients. The 2023-2024 recommended EEDD budget includes the addition of a Deputy Director-Employment and Training and the deletion an EEDD Economic Development Director. The new position will allow the Department to leverage ongoing grant funds to partially fund the position while enhancing

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## Human Services

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cohesiveness between workforce service programs and economic development.

### **Workforce Innovation & Opportunity Act (WIOA)**

The recommended budget reflects anticipated WIOA funding totaling \$13.3 million for employment and training services. As the designated administrative entity of the WIOA funding, EEDD administers WorkNet Centers in Stockton, Lodi, Manteca, Tracy, and on the San Joaquin Delta College campus.

Demand for employment and training services in the County will remain high in 2023-2024. EEDD also functions as a service provider to HSA, and in 2023-2024, EEDD will continue to partner with HSA to leverage resources from the CalWORKs and WIOA programs.

The County experienced a 6.4% unemployment rate in February 2023. This compares with an unadjusted unemployment rate of 4.8% for California and 3.9% for the nation during the same period. WorkNet service levels are dependent on WIOA funding and employment opportunities.

### **2023-2024 Funding Outlook**

In 2023-2024, Federal and State economic stimulus packages are expected to continue to provide workforce development funding to support businesses and facilitate the re-entry of displaced workers into the labor market as the COVID-19 pandemic subsides and the economy recovers.

The Department of Labor (DOL) allocates funding to States using the Federal formula that takes into consideration the current and long-term unemployment rate, poverty rate, natural disasters, and high-risk populations. States will then use a similar formula to allocate funding to LWDAs. Based on the preliminary planning figures provided, the recommended 2023-2024 EEDD budget assumes a status quo of the 2022-2023 WIOA allocations.

### **Youth Programs**

#### **Youth Services**

WIOA youth funding allows EEDD to provide at-risk and low-income youth with employment and training opportunities tailored to their specific needs and career interests to prepare them for high school graduation and assistance entering post-secondary vocational training, education, and employment. Youth service providers are contracted to operate year-round programs.

The recommended budget includes \$4.4 million in WIOA funding for the Youth Programs, a decrease of approximately \$772,000 from 2022-2023, due to a reduced projected carry-over compared to the previous budget year.

### **Students' Training and Employment Program (STEP)**

For the 2023-2024 program, EEDD anticipates receiving a \$750,000 allocation (unchanged from prior year) from the State Department of Rehabilitation. The STEP offers employment training for students with disabilities ages 16 to 21.

### **Local Workforce Development Areas (LWDAs)**

EEDD continues to pursue additional funding as opportunities become available. As a founding member of the Central California Workforce Collaborative (CCWC), EEDD partners with the seven other Central Valley LWDAs to leverage resources and apply for regional grants. In July 2022, EEDD applied on behalf of the Regional Planning Unit (RPU) for a second round of State Prison to Employment (P2E) program funding. EEDD has been notified that the RPU will receive \$3.1 million, with the County retaining \$706,000 over the three-year term of the grant. EEDD will serve as the administrative entity and fiscal agent for the RPU. The 2023-2024 budget includes \$1.2 million of this grant funding.

Another CCWC regional grant is the Regional Equity and Recovery Partnership (RERP) Grant. This grant is earmarked for the County to focus on building pathways to quality jobs working in partnership with community colleges, multiple employers, and other stakeholders concentrating on the manufacturing sector. Stanislaus County is the administrative entity of this grant totaling \$4.9 million. EEDD's share of this grant is \$569,000, continuing until September 2025. The 2023-2024 budget includes \$285,000 for this grant.

### **Economic Development Association (EDA)**

In partnership with the Board and the WDB, EEDD will continue working collaboratively with partner agencies and the business community to stimulate economic development in the County by implementing new employment training and job placement services where the needs of businesses are the focus. EEDD administers and staffs the EDA, the County's lead agency for promoting Countywide economic development, job creation, business retention and expansion, and entrepreneurial development.

The EDA will continue to work collaboratively with the County Administrator's Office and regional partners on economic development activities focused on business retention and expansion, job creation, and business attraction. The EDA will continue to administer the Business Team San Joaquin to enhance the County's regional efforts. The EDA will also prepare the annual Comprehensive Economic Development Strategy (CEDS) update.

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## Human Services

The EDA will continue to explore other State and Federal programs and legislation that would benefit the County and its businesses and industries.

### *Business Retention and Expansion Program (BREP)*

EEDD will continue to administer and implement its comprehensive BREP through the EDA in partnership with the local municipalities, Chambers of Commerce, and other organizations that deliver resources and services to new and existing businesses to support business growth. In 2022-2023, EEDD added two EEDD Business Retention and Expansion Specialists (BREPS) to enhance services to the business community. BREPS have been successfully coordinating economic development strategies and outreach to businesses to promote economic development in the County.

### *Business Concierge Center and Services*

EEDD has created a Business Concierge Center to provide small local businesses with the resources many were lacking through the COVID-19 pandemic and that will allow them to submit applications for permits, licenses, and funding opportunities with the assistance of EEDD staff. Technical assistance will also be provided through partnerships forged with the local Chambers of Commerce, Women’s Business Centers, Small Business Development Center (SBDC) and others. This one-stop location for businesses is planned to open in June 2023.

### **Other Services/Programs**

#### *Revolving Loan Fund (RLF) Program*

The RLF Program provides financing to businesses in the County that cannot obtain financing from traditional sources, and meet program eligibility requirements. As of

March 31, 2023, the RLF had nine active loans totaling \$905,036, consisting of \$828,130 of principal outstanding and \$76,906 that has yet to be drawn down. Approximately \$5.0 million will be available for RLF lending in 2023-2024. The RLF anticipates funding four to six traditional RLF loans totaling \$2.0 million in 2023-2024.

On May 7, 2020, the U.S. EDA announced its Coronavirus Aid, Relief, and Economic Security Act (CARES Act) supplemental appropriation. The County was granted authorization to establish a Sudden & Severe Economic Dislocation Revolving Loan Fund (SSED RLF) offering significant flexibility, low interest rates, and relaxed underwriting criteria. As of March 31, 2023, the SSED RLF had 11 active loans totaling \$3.7 million, consisting of \$3.7 million of principal outstanding and \$1,496 that has yet to be drawn down. The table below combines both the traditional RLF and SSED funding for a year-to-year comparison:

<b>Program Year-End</b>	<b>Outstanding Principal</b>	<b>Active Loans</b>	<b>Cumulative Loans</b>
2023 (Mar 31)	\$4,557,252	20	207
2022	\$2,232,306	14	202
2021	\$2,113,428	20	195

### *Social Media*

EEDD has been successful in expanding the promotion of services and employment opportunities on social media platforms, including Facebook, Instagram, LinkedIn, and Twitter. In 2023-2024, EEDD will continue to explore additional means of technology to better serve the citizens of San Joaquin County.



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## Human Services

### Employment and Economic Development Department Funding Sources

Program	2022-2023 Funding	2023-2024 Funding	% of 2023-2024 Budget	Change + / (-)
<i>Workforce Innovation and Opportunity Act</i>	\$13,019,113	\$13,348,155	44.0%	\$329,042
<i>WIOA COVID Employment Recovery National Dislocated Worker Grant</i>	100,000	0	0.0%	(100,000)
<i>Regional Equity and Recovery Partnership Grant</i>	0	285,000	0.9%	285,000
<i>Small Business Assistance Grant</i>	9,447,000	8,234,482	27.2%	(1,212,518)
<i>Microbusiness Assistance Grant</i>	1,243,000	0	0.0%	(1,243,000)
<i>Human Services Agency</i>	2,778,617	3,793,666	12.5%	1,015,049
<i>SJC Economic Development Association</i>	561,828	525,941	1.7%	(35,887)
<i>Revolving Loan Fund</i>	403,503	494,040	1.6%	90,537
<i>Community Corrections Partnership/AB 109</i>	856,157	911,855	3.0%	55,698
<i>Prison to Employment Grant</i>	0	1,200,000	4.0%	1,200,000
<i>Students' Training and Employment Program Grant</i>	750,000	750,000	2.5%	0
<i>Miscellaneous Revenue</i>	686,745	769,693	2.5%	82,948
<b>Total</b>	<b>\$29,845,963</b>	<b>\$30,312,832</b>	<b>100.00%</b>	<b>\$466,869</b>

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## Human Services

### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Adult Services</b>					
<i>Job Seekers Served</i>	29,411	14,128	15,859	15,206	15,851
<i>Job Seeker Services</i>	140,689	49,907	72,299	69,081	72,189
<i>Enrolled Participants</i>	1,344	1,281	866	1,153	1,217
<i>Job Placements</i>	395	407	437	193	208
<i>Average Hourly Earnings*</i>	\$15.69	\$21.18	\$22.40	\$25.45	\$24.89
<i>Major/Targeted Job Fairs</i>	279	349	395	435	435
<i>Employers Participating</i>	603	440	623	840	840
<b>Youth Services</b>					
<i>Youth Served</i>	2,281	364	352	615	1,351
<i>Youth Services</i>	5,766	1,905	2,314	3,466	5,836
<i>Work Experience</i>	313	314	192	248	280
<i>Job Placements</i>	692	48	66	141	310
<b>Business Services</b>					
<i>Businesses Served</i>	5,679	3,125	3,446	1,979	1,653
<i>Business Service Referrals</i>	14,751	803	1,767	289	303
<i>Layoff Aversion/Business Retention</i>	1,849	1,010	1,961	830	900
<i>Revolving Loan Fund Inquiries</i>	63	40**	50	60	63
<b>Rapid Response</b>					
<i>Businesses Affected</i>	209	56	30	8	10
<i>Orientations</i>	126	36	30	8	10
<i>Impacted Employees</i>	10,063	1,237	692	313	225
<b>Website Usage</b>					
<i>User Sessions</i>	273,903	347,510	359,754	413,574	413,574
<i>Site Hits</i>	2,779,682	4,820,191	3,608,101	3,651,850	3,651,850
<b>CalWORKs/Welfare-to-Work</b>					
<i>Work Experience/Community Service/E-Works</i>	252	7	3	185	299
<i>Client Assessment</i>	265	213	190	143	150
<b>Homeless Served</b>	50	38	94	100	105

\* WIOA only.

\*\* Restated.

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## Human Services

Greg Diederich, *Health Care Services Director*  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$1,161,530	\$1,390,127	\$1,456,955	\$1,456,955	\$66,828
Services & Supplies	51,380	287,897	298,844	298,844	10,947
Centrally-Budgeted Expenses	(5,675)	139,423	49,677	49,677	(89,746)
Other Charges & Uses	14,661,022	15,837,635	16,201,761	16,201,761	364,126
Capital Expenditures	517,819	315,000	312,882	312,882	(2,118)
Total Expenditures	\$16,386,076	\$17,970,082	\$18,320,119	\$18,320,119	\$350,037
Expenditure Reimbursements	(1,220,581)	(1,350,127)	(1,513,955)	(1,513,955)	(163,828)
Total Appropriations	\$15,165,495	\$16,619,955	\$16,806,164	\$16,806,164	\$186,209
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$15,131,277	\$16,619,955	\$16,806,164	\$16,806,164	\$186,209
Total Revenues	\$15,131,277	\$16,619,955	\$16,806,164	\$16,806,164	\$186,209
<b>Net County Cost</b>	\$34,218	\$0	\$0	\$0	\$0
<b>Allocated Positions</b>	10.0	10.0	10.0	10.0	0.0
Temporary (Full-Time Equivalent)	0.8	0.8	0.0	0.0	(0.8)
Total Staffing	10.8	10.8	10.0	10.0	(0.8)

## Purpose

Neighborhood Preservation administers, plans, coordinates, and implements the County's grant-funded housing and community development programs. Neighborhood Preservation also performs these functions for the San Joaquin Continuum of Care (CoC) under a memorandum of understanding as their Collaborative Applicant and Administrative Entity.

Federal funding for these activities comes from the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant (CDBG), Emergency Solutions Grant (ESG), HOME Investment Partnership (HOME) programs for the unincorporated County and five participating cities (Escalon, Lathrop, Manteca, Ripon, and Tracy), and the CoC program.

State-funded programs administered by the California Department of Housing and Community Development (HCD) include the State ESG; California Emergency Solutions and Housing (CESH); Homeless Housing, Assistance, and Prevention (HHAP); and Permanent Local Housing Allocation (PLHA).

## Major Budget Changes

### Salaries & Employee Benefits

- \$95,259 Salary and benefits adjustments.
- (\$28,431) Eliminate extra-help budget.

### Services & Supplies

- \$16,000 Establish budget for Lathrop office data connectivity.
- \$9,300 Establish budget for Lathrop office utilities and janitorial.
- (\$18,000) Decrease budget for Lathrop office rent expense based on executed lease.

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## Human Services

### Centrally-Budgeted Expenses

- \$6,593 Increase in data processing charges.
- (\$98,069) Cost Allocation Plan adjustment.
- (\$569,766) Decrease in CDBG Cares Act grants due to completed projects.
- (\$527,135) Decrease in State ESG Cares Act grants exhausting midyear 2023-2024.

### Other Charges

- \$1,574,111 Increase in PLHA program costs due to Round 3 projects.
- \$525,853 Increase in HHAP costs due to Round 3 projects.
- \$302,129 Increase in CoC grant activity for homeless programs.
- \$266,981 Increase in CESH program activity.
- \$60,452 Increase in HOME program activity.
- (\$1,446,416) Decrease in Fed ESG Cares Act grants exhausting midyear 2023-2024.
- (\$527,135) Decrease in State ESG Cares Act grants exhausting midyear 2023-2024.
- (\$383,183) Decrease in CDBG Cares Act grants due to completed projects.

### Capital Expenditures - Structures & Improvements

- \$312,882 South Stockton Sidewalks project.

### Expenditure Reimbursements

- \$163,828 Increase in reimbursement from HUD/State grants and Local Community Corrections based on increases in staffing costs.

### Revenues

- \$1,574,111 Increase in PLHA program revenue due to Round 3 projects.
- \$525,853 Increase in HHAP revenue due to Round 3 projects.
- \$302,129 Increase in CoC grant revenue for homeless programs.
- \$266,981 Increase in CESH program revenue.
- \$60,452 Increase in HOME program revenue.
- (\$1,446,416) Decrease in Fed ESG Cares Act grants exhausting midyear 2023-2024.

## Program Discussion

The 2023-2024 recommended budget for Neighborhood Preservation totals \$18,320,119, which is an increase of \$350,037 from the 2022-2023 adjusted budget.

### Transition to Health Care Services Agency

On December 8, 2020, the Board of Supervisors adopted a resolution (R-20-200) amending the department allocation listing and transferring the Neighborhood Preservation Division from the Community Development Department (CDD) to the Health Care Services (HCS) Agency, effective December 21, 2020, along with the Program Administrator-Homeless Initiatives position transferred from the County Administrator's Office.

This consolidation of resources allows closer integration of various programs and staffing such as ESG, CoC, CESH, HHAP, CDBG, PLHA, and No Place Like Home. Furthermore, it provides greater opportunity for enhanced collaboration with other HCS Agency responsibilities such as Behavioral Health, Public Health, Veterans Services, and Whole Person Care and for programming opportunities resulting from changes to Medi-Cal services under various California Advancing and Innovating Medi-Cal (CalAIM) initiatives. In conjunction with the restructuring and transition from CDD, a vacant Deputy Director-Programs and Administration position was deleted, and the duties were assumed by HCS Agency leadership. HCS continues to review its need for a Director position within Neighborhood Preservation.

Neighborhood Preservation staff relocated from long-term office space within CDD to leased space in Lathrop in August 2022.

### COVID-19

In February 2020, HCD announced the funding award for the COVID-19 ESG program. The County received a grant for \$750,500 (Round 1) and \$3,000,000 (Round 2) which were authorized by the Board on July 7, 2020 (R-20-122) and November 3, 2020 (R-20-177), respectively. These funds are being used to prevent, prepare for, and respond to COVID-19 impacts, and must be expended within a limited timeframe. Eligible activities include emergency shelter operations, street outreach, renovation, major rehabilitation, and rapid re-housing. The budget includes \$226,778 for projects not yet completed.

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## Human Services

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In April 2020, HUD announced the availability of grant funding from the Coronavirus Aid, Relief, and Economic Security Act (CARES) to provide economic stimulus in response to the distress caused by the COVID-19 pandemic. As a result, the County received an additional \$935,414 (Round 1) through the CDBG program and \$818,545 (Round 1) and \$4,326,957 (Round 2) through the Federal ESG program, authorized by the Board August 4, 2020 (B-20-469). An additional \$1,009,737 for Round 3 of the CDBG program was authorized on April 20, 2021 (B-21-250). This funding is being used to prevent, prepare for, and respond to COVID-19 impacts, and must be expended within a limited timeframe. The budget includes \$500,000 of Federal ESG funding for projects not yet completed.

### Community Development Block Grant (CDBG)

The County uses CDBG funds for infrastructure, public facilities, public services, recreation projects, and affordable housing. During 2023-2024, the County plans to use \$926,776 in new CDBG funding, including funding for capital projects. In addition, \$749,440 is being budgeted in 2023-2024 for projects not yet completed.

### Capital Projects

Funded by CDBG, Capital Projects for 2023-2024 consist of \$312,882 for the South Stockton Sidewalks project. These projects generally consist of public facility construction, enhancements for facilities located in low-income neighborhoods, or facilities to provide services to predominantly low-income individuals.

### HOME Investment Partnerships

In 2023-2024, the unincorporated County's share of funding is approximately \$435,051, which includes a nonprofit housing developer set-aside, with the remainder designated to the five participating cities (Escalon, Lathrop, Manteca, Ripon, and Tracy). The County's funds will be utilized for down payment assistance for first-time homebuyers, Countywide rehabilitation of single-family housing, and overall program administration. A local nonprofit housing corporation will be funded to conduct eligible housing activity providing a benefit to low-income households. An additional \$912,152 is budgeted in 2023-2024 for projects not yet completed.

The HCS Agency's 2022-2025 SMART goals include development of a project list for HOME-American Rescue Plan (ARP) funding and the allocation of 100% of available funding to increase emergency shelter bed capacity and permanent supportive housing by July 2023.

### Homeless Programs

#### *Emergency Solutions Grant (ESG)*

In 2023-2024, \$346,319 in Federal ESG funding will support the operational costs of 14 homeless services and shelter providers in the County and \$236,350 in State ESG funding will support 11 homeless services and shelter providers.

Neighborhood Preservation acts as the administrative entity for these programs and is tasked with financial oversight and ensuring that projects are timely and in compliance with all regulations and agreements.

#### *Continuum of Care (CoC)*

The CoC is a non-governmental, non-incorporated association meeting Federal requirements as a collaborative and coordinating system including government, non-profit homeless housing and service providers, and other community stakeholders, increasing public awareness and promoting programs addressing the needs of people experiencing homelessness. Neighborhood Preservation collaborates with the CoC Board and Committees through the County's Program Administrator-Homeless Initiatives on programs intended to make homelessness rare, brief, and non-recurring. Funding for this position requires a minimum 25% compliant source of local match, which has been provided through ongoing support from the Community Corrections Partnership (CCP) via Assembly Bill 109 funding. An annual request to renew this funding is presented to the CCP every March and became a baseline CCP funded activity in 2021-2022. Absent this CCP funding, the local match may require direct County General Fund support. The 2023-2024 budget includes \$55,000 in anticipated reimbursements from CCP.

The County, on behalf of the CoC, received renewed funding commitments for seven existing CoC housing programs and the Homeless Management Information System, totaling \$4.7 million.

All CoC program funds will be used to continue providing housing and supportive services to homeless individuals and families. In 2023-2024, applications for programs will be submitted to maximize the availability of supportive services and housing.

#### *California Emergency Solutions and Housing Program (CESH)*

In 2023-2024, CESH funds will be used for rental assistance and housing relocation, affordable permanent housing for the homeless, emergency housing, and system support for the Coordinated Entry and/or Homeless Management Information System. Unexpended Round 1 funds of \$392,689

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## Human Services

and Round 2 funds of \$376,412 are budgeted in 2023-2024 for projects not yet completed.

### *Homeless Housing, Assistance, and Prevention (HHAP)*

In 2023-2024, HHAP funds will be used for rental assistance and rapid re-housing designated for youth and new temporary and emergency shelter activities.

The 2023-2024 budget includes unexpended Round 1 funds of \$1,525,123, unexpended Round 2 funds of \$456,630, and new Round 3 funding of \$1,903,268.

### *Permanent Local Housing Allocation (PLHA)*

In 2023-2024, PLHA funds will be partially used by the Whole Person Care (WPC) Pilot Program to provide homeless individuals with supportive services, in coordination with emergency shelters, and placement into housing as the WPC Program transitions toward increasing the amount of direct Medi-Cal funding provided under CalAIM. PLHA funds may also be used to support navigation centers or for expanded congregate or non-congregate shelter capacity. Neighborhood Preservation continues to explore establishing a regional housing pool for the development of permanent supportive housing projects with PLHA funding. Unexpended Round 1 and Round 2 funds of \$2,071,866 are budgeted in 2023-2024 for projects not yet completed. This includes \$497,486 in Round 1 funding to be used by the

Housing Authority of the County of San Joaquin for the Sonora Square project, providing permanent supportive housing to individuals at risk of or experiencing homelessness. Round 3 funds are included in the budget in the amount of \$747,016. These funds will also be used for permanent housing projects.

Program	New Funding	Rollover Funding	2023-2024 Program Budget
State ESG*	\$0	\$226,778	\$226,778
Federal ESG*	0	500,000	500,000
CDBG	926,776	749,440	1,676,216
HOME	435,051	912,152	1,347,203
ESG Federal	180,068	166,251	346,319
ESG State	199,467	36,883	236,350
CoC	3,809,182	899,591	4,708,773
CESH	0	769,101	769,101
HHAP	1,903,268	1,981,753	3,885,021
PLHA	747,016	2,071,866	2,818,882
<b>Total</b>	<b>\$8,200,828</b>	<b>\$8,313,815</b>	<b>\$16,514,643**</b>

\*COVID-19

\*\*Other Charges & Uses + Capital Expenditures

# 5055246000—Neighborhood Preservation

## Human Services

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>Program Expenditures</b>					
<i>CDBG Expense</i>	\$901,723	\$1,674,153	\$2,263,308	\$2,071,659	\$1,967,737
<i>Emergency Solutions Grant</i>	\$226,950	\$118,638	\$3,325,667	\$2,276,897	\$846,319
<i>HOME Expense</i>	\$577,439	\$295,893	\$65,170	\$1,286,751	\$1,347,203
<i>Continuum of Care</i>	\$4,853,325	\$3,880,259	\$4,667,472	\$4,626,509	\$4,708,773
<i>State ESG</i>	\$230,124	\$401,608	\$2,671,656	\$1,170,856	\$463,128
<i>CESH</i>	\$228,222	\$225,387	\$116,924	\$502,120	\$769,101
<i>HEAP*</i>	\$2,433,943	\$138,462	\$77,902	N/A	N/A
<i>HHAP</i>	\$555	\$32,817	\$1,902,443	\$3,359,168	\$3,885,021
<i>CEHF*</i>	\$192,995	\$708,720	\$82,747	N/A	N/A
<i>PLHA</i>	N/A	\$1,909	\$5,552	\$1,244,771	\$2,818,882
<b>Housing Rehabilitation (Units)</b>					
<i>Homeless Prevention (Households)</i>	104	105	286	353	125
<i>Housing Rehabilitation (CDBG &amp; HOME)</i>	8	7	2	9	7
<i>First Time Homebuyers Assistance (CDBG &amp; HOME)</i>	12	4	1	0	5
<i>Tenant Based Assistance (CoC)</i>	889	938	1,105	975	975
<i>CESH (Individuals)</i>	169	105	44	28	26
<i>HEAP (Individuals)*</i>	62	26	43	N/A	N/A
<i>CEHF (Individuals)*</i>	4,828	7,464	811	N/A	N/A
<i>HHAP</i>	N/A	N/A	1,939	5,780	6,500

\*Grant ended June 30, 2021. Activity for 2021-2022 reflects run-off.

# 5055600000—Veterans Services Office

## Human Services

Greg Diederich, *Health Care Services Director*  
[www.sigov.org/department/hcs](http://www.sigov.org/department/hcs)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$383,426	\$679,651	\$1,054,624	\$1,054,624	\$374,973
Services & Supplies	91,686	179,566	280,788	280,788	101,222
Centrally-Budgeted Expenses	47,323	83,792	58,430	58,430	(25,362)
Total Expenditures	\$522,435	\$943,009	\$1,393,842	\$1,393,842	\$450,833
Expenditure Reimbursements	(163,001)	(160,000)	(160,000)	(160,000)	0
Total Appropriations	\$359,434	\$783,009	\$1,233,842	\$1,233,842	\$450,833
<b>Earned Revenues By Source</b>					
Aid From Other Governments	\$238,663	\$309,344	\$310,000	\$310,000	\$656
Total Revenues	\$238,663	\$309,344	\$310,000	\$310,000	\$656
<b>Net County Cost</b>	\$120,771	\$473,665	\$923,842	\$923,842	\$450,177
<b>Allocated Positions</b>	4.0	7.0	10.0	10.0	3.0
Temporary (Full-Time Equivalent)	2.2	2.1	0.0	0.0	(2.1)
Total Staffing	6.2	9.1	10.0	10.0	0.9

## Purpose

The San Joaquin County Veterans Services Office (VSO) assists veterans and their families navigating the complex Federal and State regulatory systems to apply for United States Department of Veterans Affairs (VA) and State of California benefits earned by members of the United States Armed Services in defense of our nation.

State and Nationally accredited County Veterans Service Representatives (VSR) assist veterans and their families with services to include National, State, and local cemetery admissions; burial honors; aid for housebound assistance; DMV veteran license and license plate identifiers; widow/widower pensions; State and Federal home loan programs; VA/HUD-VASH housing vouchers; State Veteran Home Admissions; Veteran Life and Disability Insurance; education, rehabilitation and employment services; veteran-owned small business information; disability and pension assistance; and more.

Many of the approximately 27,000 veterans living in San Joaquin County are eligible to receive earned benefits. VA's processes contain strict procedures and timelines. Correctly filed claims results in millions of dollars in compensation awarded annually to San Joaquin County veteran families. Additionally, the County receives financial reimbursement for workload units through the State of California subvention awards program.

The VSO performs outreach events and collaborates with governmental, private, non-profit, educational, and correctional agencies to encourage community awareness and the cooperation needed to provide supportive services for veterans and their families.

The VSO serves as a liaison between the Board of Supervisors; the Veterans Advisory Commission; Veterans Treatment Court; VA Healthcare Systems; national, State, and local Veteran Service Organizations; other County agencies; and the public, ensuring veterans receive the maximum level of benefits and advocacy they deserve.



# 505560000—Veterans Services Office

## Human Services

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### Major Budget Changes

#### Salaries & Employee Benefits

- (\$9,234) Salary and benefits adjustments.
- \$191,356 Full-year cost of two Veterans Service Representatives I-II added midyear 2022-2023.
- \$103,199 Add a Mental Health Specialist I-II.
- \$95,676 Add a Veterans Service Representative I-II.
- \$84,674 Add an Office Technician/Coordinator.
- (\$90,698) Decrease in extra-help.

#### Services & Supplies

- \$87,908 Establish budget for lease expense for relocated office.
- \$8,000 Increase in training costs due to new staff.

#### Centrally Budgeted Expenses

- (\$31,548) Cost Allocation Plan adjustment.

### Program Discussion

The 2023-2024 recommended budget for the Veterans Services Office (VSO) totals \$1,393,842, which is an increase of \$450,833 from the 2022-2023 adjusted budget.

The effort to improve services and fill vacancies at the VSO was bolstered during 2022-2023 by: increases in pay for Service Employees' International Union (SEIU) Local 1021 employees adopted by the Board of Supervisors on October 18, 2022 (B-22-567); a side letter agreement with SEIU Local 1021 providing a 10% compensation increase for the Veterans Service Representative (VSR) series classification adopted on January 10, 2023 (B-23-14); the adoption of revisions to the VSR I classification allowing a new pathway for applicants with lived experience, expanding the applicant pool; and the allocation of two additional full-time VSR positions on December 13, 2022 (R-22-236).

Action taken by the Board in December 2022 increased the number of allocated full-time VSRs to five and positions the VSO to better meet the high demand for appointments and walk-in services, to eventually establish services at several new satellite office locations in partnership with veteran-affiliated entities, and to further expand services to a variety of veterans once the positions are filled.

After more than 23 years at its downtown Stockton location, the VSO moved to a new interim location within the County's Employment and Economic Development Department located in central Stockton in February 2023. The new location provides free parking, security screening at the front lobby, and can accommodate assistive mobility devices.

The VSO continues to work with the General Services Department, Community Development, and the County Administrator's Office on plans for construction of a new VSO site in French Camp, adjacent to the Victory Gardens housing project as a component of a future HomeKey application to construct additional low-income housing units on County-owned land. The notice of funding availability for the next HomeKey round is expected to be released in May 2023.

The proposed new satellite office locations will operate on a rotating schedule and will focus on addressing the needs of underserved veteran populations such as rural veteran families; low-income college students; housebound, hospice, and incarcerated veterans; and those with limited transportation resources.

#### Veterans Service Officers Model

The County VSO model utilizes uniquely qualified and accredited VSRs to ensure County veterans receive new monetary benefits, retroactive payments, and other forms of assistance. Staff help veterans and their families, dependents, and survivors find and qualify for a wide variety of Federal and State benefits earned by their service in defense of their Nation. This work involves filing claims for compensation and monetary pension benefits, assisting with the Federal appeals process, managing complex cases requiring opening Congressional inquiries, implementing burial/cemetery rights, and verifying educational benefits for children of veterans and service members, among other duties.

It is estimated \$5.2 million in benefits will be paid to San Joaquin County families during Fiscal Year 2022-2023. VSO outreach included participating in the first San Joaquin County Stand Down in over seven years and adding over 30 outreach events to the annual calendar.

#### Community and Veterans Affairs Affordable Housing Projects and Awards

The County is experiencing increased population growth and housing development. As the overall County population grows, so does the County's veteran population and the need for additional affordable housing.

San Joaquin County is fortunate to have four affordable veteran housing projects. In 2016, Anchor Village became the first Cap-and-Trade-funded transit project in the Central

# 5055600000—Veterans Services Office

## Human Services

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Valley, with 51 affordable housing units with a veteran's preference and also serving other low-income families.

Liberty Square, a 70-unit, 3-story, housing project located in downtown Stockton, was completed in December 2021 with a focus on serving low-income veterans.

For the first time in the County's history, the State Veteran Housing and Homelessness Prevention Program (VHHP) partnered with the Housing Authority of the County of San Joaquin to create Victory Gardens, a \$27.0 million, 48-unit veterans housing project located on County-owned land in French Camp, which was completed fall 2022.

The County is also fortunate to have a Department of Housing and Urban Development-Veterans Affairs Supportive Housing (HUD-VASH) program which combines Housing Choice Voucher rental assistance for homeless veterans with case management and clinical services provided by the Department of Veterans Affairs (VA). The VA provides these services to participating veterans eligible for VA health care.

The VSO has long-standing partnerships with the Central Valley HUD-VASH team and community non-profit veteran housing support agencies such as Catholic Charities, Westcare, and the Berkeley Food and Housing Project, recipients of Supportive Services for Veteran Families Federal VA grants. All agencies work together to assist homeless and unstably housed veteran families through utilities, rental, security deposit, housing goods, child care, financial support, and VA benefit applications.

The VSO assists HUD-VASH social workers by determining a veteran's health care eligibility, requesting copies of discharge papers, and submitting disability and pension claims, often resulting in increasing a veteran's income, greatly stabilizing their housing situation.

### **Stockton VA Community-Based Outpatient Clinic (CBOC) Progress and Planning for San Joaquin County's First Veteran Community Living Center (CLC - Nursing Home)**

By November 2023, VA Northern California Health Care and the Army Corps of Engineers are expected to complete the construction of a new 158,000 square foot VA Stockton CBOC facility located in French Camp. Patient services are expected to begin in January 2024.

The facility is anticipating 89,000 veteran visits per year and will feature the VA's Patient Aligned Care Team model, telehealth, mental health, pharmacy, and many other specialty care services.

The Stockton/French Camp VA campus was also selected for the construction of an 80-bed, Community Living Center (CLC) scheduled to be completed in early 2025.

The much-anticipated French Camp CLC move will bring a skilled nursing facility level of care to the Central Valley and provide much needed long-term care for County veterans. It will also significantly reduce commute time and fuel costs for the many Central Valley families wishing to frequently visit their loved one residing in a CLC.

### **Veterans Treatment Court (VTC) Funding**

The 2023-2024 recommended budget includes \$45,000 for activities related to the VTC. Funding will be used to support mental health and substance abuse counseling groups for VTC clients awaiting access to VA services, veterans ineligible for VA health care, and other veterans in need of counseling supports. The funds may also be used to support continuing education and training, transportation costs to court if needed, peer mentor support for low-income veterans, and the cost of court-mandated domestic violence and anger management courses for veterans unable to pay for such services.

This funding will also support case management services for VTC clients and an update of the collaborative VTC participant handbook and resource guide, which helps secure adequate community care and support of vulnerable veterans who lack adequate health care coverage.

### **Veterans Advisory Commission (VAC)**

On November 6, 2018, the Board of Supervisors adopted a resolution establishing the San Joaquin County Veterans Advisory Commission and approved the Commission By-Laws (R-18-143). The Commission works in conjunction with the VSO to provide a forum for various representatives working with the County's veterans and also works closely with other organizations to support and promote veterans' advocacy, benefits, and services, and serves as a liaison between the veteran community and the Board of Supervisors.

During 2022-2023, the VAC helped address a list of concerns presented by a local veteran service organization group. Concerns included personal safety and security accessing the VSO office, parking fees and lack of available parking, accessibility issues, and other facility-related concerns. These issues were resolved with the move to the new interim office location in February 2023.

Other concerns include staffing levels, service capacity, and a lack of mental health access. The VAC is developing a strategic plan to present to the Board in 2023-2024 and will continue to address concerns of community members.

# 5055600000—Veterans Services Office

## Human Services

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### Supplemental Requests

The VSO is requesting supplemental funding totaling \$303,959 for the following:

#### *Lease Costs*

Funding of \$87,908 is requested for rent and utilities expense associated with the Office's February 2023 move to central Stockton.

#### *Staffing*

Funding of \$283,549 is requested for the following new full-time positions: Veterans Service Representative II, Mental Health Specialist II, and Office Technician/Coordinator. An offsetting decrease in extra-help of \$67,498 results in a net request of \$216,051.

Human Resources is processing a classification study to establish a new supervisory class of Veterans Services Representative III. Upon approval by the Board of Supervisors, the Veterans Service Representative II position (\$95,676) will be reclassified to Veterans Service Representative III.

This position's responsibilities will include providing supervision and training to subordinate staff, coordinating remote satellite office sites, managing the Veteran Affairs Federal Work Study program, serving as the technical training expert for the Code of Federal Regulations, correctly applying State statutes, preparing arguments and documentation, and representing clients at the Federal Appellate Court level on benefit appeal issues.

A Mental Health Specialist I-II (\$103,199) is requested to effectively provide direct intensive case management for veterans presenting with mental health and/or substance abuse symptomology, suicidality history, are homeless or unstably housed, are justice involved or have been diagnosed with a severe cognitive impairment, such as traumatic brain injury, Alzheimer's disease, or stroke.

An Office Technician/Coordinator position (\$84,674) is requested to manage the increase in VSO performance tracking metrics, VetPro software changes, data collection, audits, equitable workload transference, State subvention funding reports, and intensive case management coordination.

The recommended budget has been augmented by \$303,959 to address these requests.

# 5055600000—Veterans Services Office

## Human Services

### Workload Data

	2019-2020	Actual 2020-2021	2021-2022	Est./Act. 2022-2023	Projected 2023-2024
<b>Veteran Visits</b>					
<i>Appointments</i>	3,006	3,547	1,632	1,600	1,750
<i>Drop-Ins</i>	2,070	1,791	2,235	2,300	2,400
<b>Benefits Claims</b>					
<i>All Claims Activity</i>	4,122	3,547	2,780	2,700	2,900
<i>Benefits Claims Filed/Re-Opened</i>	1,456	1,190	1,096	1,200	1,300
<i>Benefits Claims Granted</i>	1,053	835	891	820	850
<i>Claims for VA Medical Care</i>	215	286	140	135	145
<i>Medi-Cal Cost Avoidance Claims</i>	133	138	102	100	100
<i>Verification of Veterans Benefits         to Other Agencies</i>	84	98	95	95	100
<b>Other Assistance Provided</b>					
<i>Auditable Forms Filed</i>	2,573	2,327	1,731	1,500	1,750
<i>Educational Fee Waivers</i>	349	322	268	250	250
<i>Veterans Court Participants</i>	78	54	85	60	55
<b>Homeless Veterans Served</b>					
<i>Received Services from VSO</i>	105	N/A	35	41	30
<i>Referred to HUD-VASH</i>	32	N/A	30	35	25
<i>Referred to Behavioral Health Services</i>	8	N/A	7	8	10
<i>Benefits Claims Filed/Re-Opened</i>	45	N/A	N/A	40	45
<i>Benefits Claims Granted</i>	45	N/A	N/A	30	35
<b>New Benefits Paid to Veterans/Dependents</b>	\$11,560,946	\$12,134,769	\$9,134,524	\$5,191,188	\$6,800,000



# ADOPTED BUDGET

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## *Education*

# Education

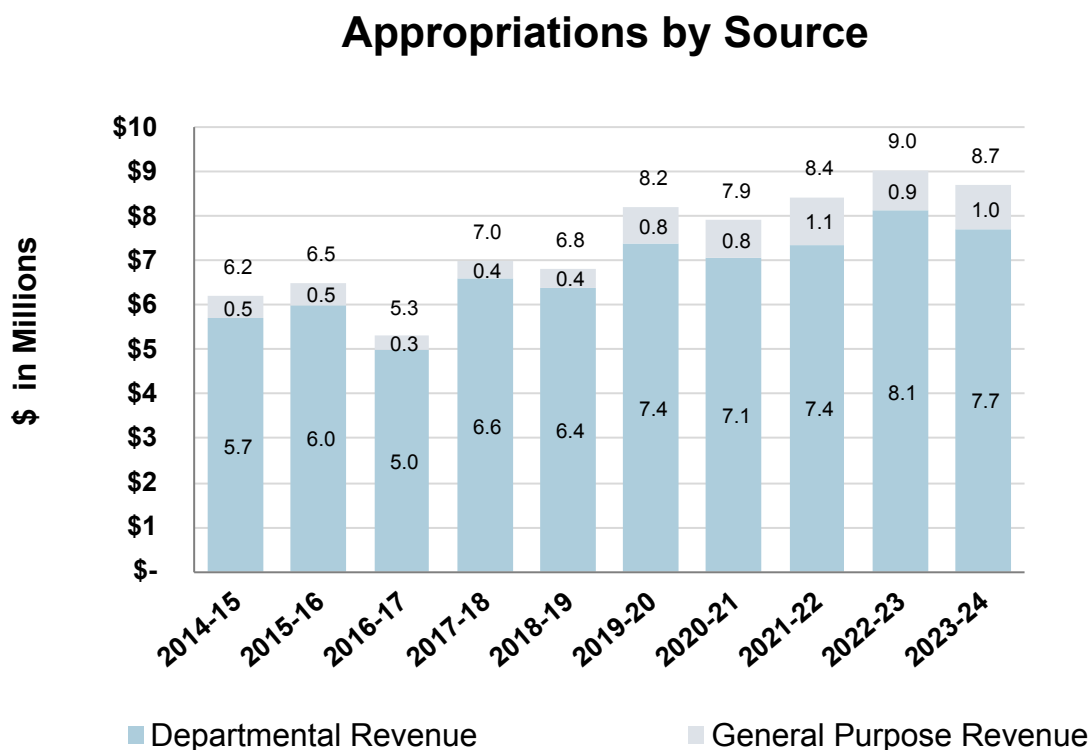
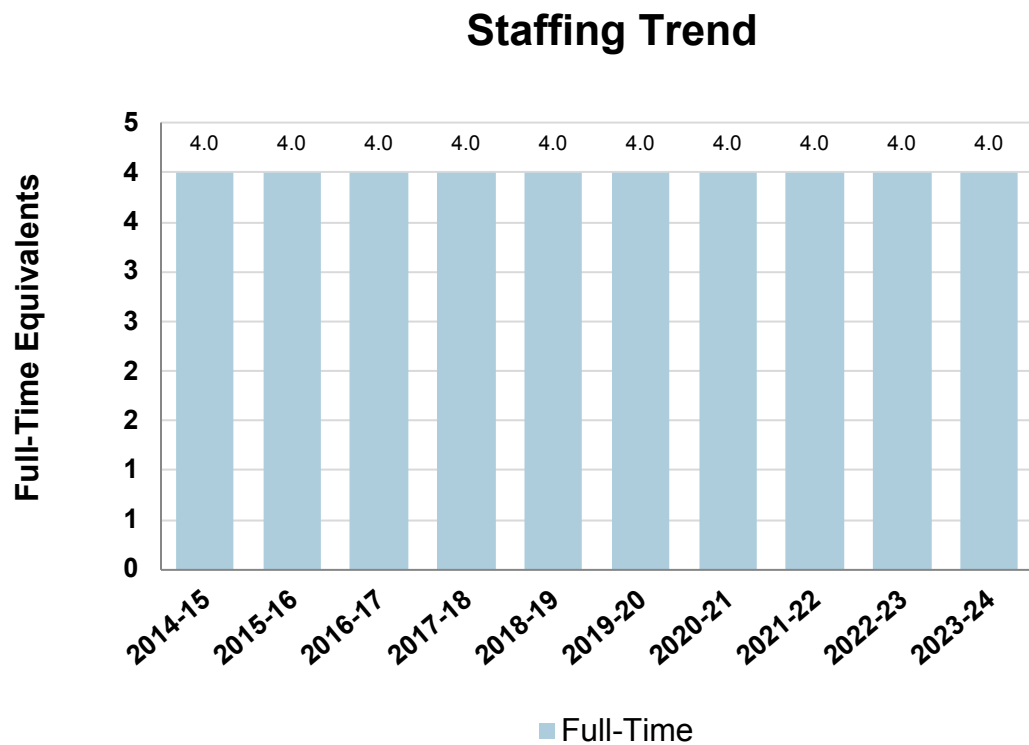
## Appropriations

	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
6060900000 County Library	H-4	\$8,121,536	\$7,711,536	\$7,711,536	(\$410,000)
6061500000 UC Cooperative Extension	H-8	921,860	980,868	980,868	59,008
Total - Education		\$9,043,396	\$8,692,404	\$8,692,404	(\$350,992)

# Education

## Appropriations

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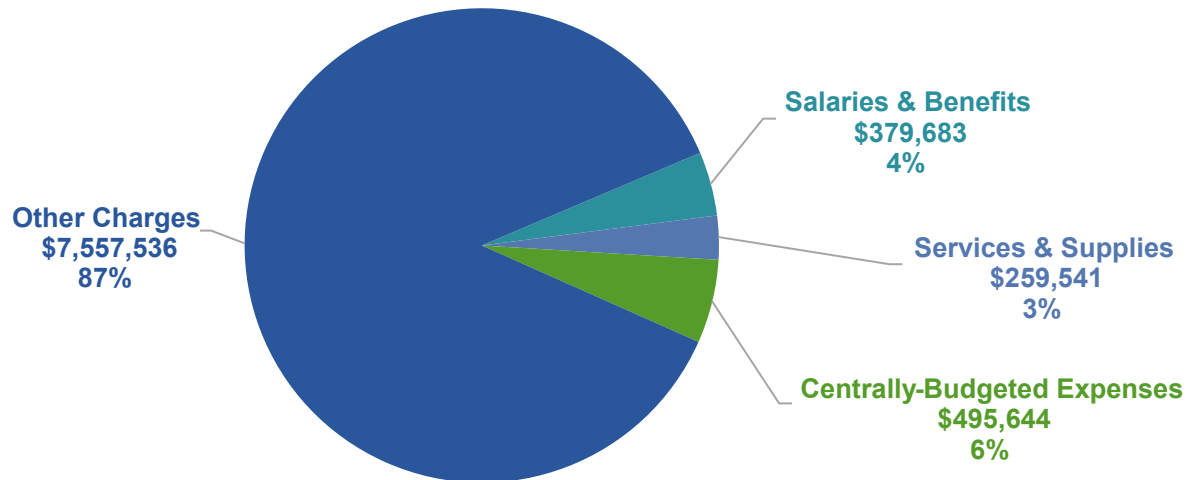
# Education

## Appropriations

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### Use of Funds

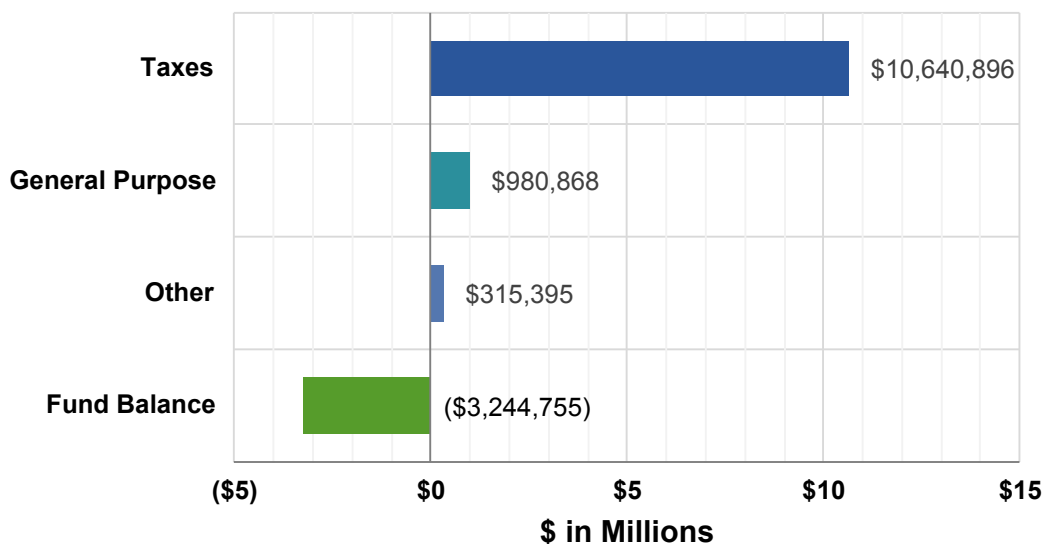
2023-2024 Adopted Budget  
Total Appropriations \$8,692,404



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### Source of Funds

2023-2024 Adopted Budget  
Total Revenue \$8,692,404





# 6060900000—County Library

## Education

Jerome C. Wilverding, County Administrator

Special Revenue Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
<i>Services &amp; Supplies</i>	\$153,396	\$120,000	\$154,000	\$154,000	\$34,000
<i>Other Charges &amp; Uses</i>	7,242,000	8,001,536	7,557,536	7,557,536	(444,000)
<i>Total Appropriations</i>	\$7,395,396	\$8,121,536	\$7,711,536	\$7,711,536	(\$410,000)
<b>Earned Revenues By Source</b>					
<i>Taxes</i>	\$9,833,382	\$9,841,835	\$10,640,896	\$10,640,896	\$799,061
<i>Interest/Rents</i>	2,057	8,060	8,060	8,060	0
<i>Aid From Other Governments</i>	237,252	351,600	263,443	263,443	(88,157)
<i>Charges For Services</i>	30,928	43,892	43,892	43,892	0
<i>Fund Balance</i>	(2,708,223)	(2,123,851)	(3,244,755)	(3,244,755)	(1,120,904)
<i>Total Revenues</i>	\$7,395,396	\$8,121,536	\$7,711,536	\$7,711,536	(\$410,000)
<b>Net County Cost</b>	\$0	\$0	\$0	\$0	\$0

## Purpose

This budget provides the County's share of the cost for the City/County Library System. The Library System serves the cities of Escalon, Lathrop, Manteca, Ripon, Stockton, and Tracy, as well as the unincorporated areas of the County. Through an agreement between the County and the City of Stockton, the City operates the City/County Library System. The County's funding for Library services is comprised of a library-specific dedicated property tax allocation, a pro rata share of Library fines and materials fees relative to County branch circulation, and any accumulated available balance from unspent prior years' activities.

## Major Budget Changes

### Services and Supplies

- \$34,000 Increase in tax administration charges.

### Other Charges

- (\$444,000) Decrease in funding for Library services.

### Revenues

- \$1,120,904 Increase in retention of County fund balance.
- \$799,061 Increase in property tax revenue.
- (\$88,157) Decrease in State funding.

## Program Discussion

The County's share of funding is primarily driven by property tax revenue. It is projected that \$7,711,536 will be available for Library operations for 2023-2024, a decrease of \$410,000 from the 2022-2023 adjusted budget, and will:

- Fund the Library's share of the property tax administration fee of \$154,000.
- Provide a total program budget of \$7,557,536 for Library services.

### Library Services

In 2022-2023, the Library worked on several one-time funding projects. There were two interior redesign projects that were approved for the Tracy and Manteca libraries. The Tracy Library redesign for the adult, teen, and circulation area of the branch focuses on enhanced service points, comfortable seating, and reconfiguration of spaces to provide a welcoming, 21st century library experience. The Manteca Children's Room is also being redesigned to provide a

# 6060900000—County Library

## Education

welcoming space for families with an area to read, relax, and engage with library activities.

Bids for a new bookmobile to service County and City patrons have been released and slated for review. This is an ongoing project due to the protracted timeline of an estimated 18-month build time.

A Request for Proposal for a new self-check system was released in December of 2022. Vendors have responded and demonstrations are scheduled. Implementation and completion of this project is anticipated for December 2023.

In November 2016, voters approved the Strong Communities Initiative (Measure M), adding a quarter-cent sales tax for a period of 16 years to fund City of Stockton library and recreational services. Capital projects prioritized in the Measure M spending plan for 2022-2023 included continuing construction costs for the Cesar Chavez Central Library renovation project and Community Center, and improvements for the Stockton aquatic renovations.

Libraries fully restored services to pre-COVID-19 pandemic in March of 2022. Program and service goals achieved in 2022-2023 included: full restoration of hours to all library locations across the County; a return to hosting in-person programming for all ages; a full Summer Reading program that had numbers exceeding the 2019 program, the last full program pre-pandemic; and receiving a \$10.0 million dollar grant from the State Library to repair and replace critical life/safety issues at the Cesar Chavez Central Library.

In 2023-2024, the Library will continue branch renovation projects to make all County and City of Stockton Library branches welcoming and conducive to community gatherings. Below are weekly hours for County branches including additional hours funded by the respective municipalities.

County Branch	Base Weekly Hours*	Extra Hours Funded by Cities
Escalon	31	-
Lathrop	30	-
Linden	30	-
Manteca	40	8
Mountain House	40	16
Ripon	40	5
Thornton	30	-
Tracy	40	13

*\*Weekly hours do not reflect holidays or branch closures.*

All branches within the Stockton and County Public Library System will close during 2023-2024 on the following days in observance of holidays:

### Branches Closed - Holidays

- July 4, 2023
- September 4 and 22, 2023
- October 9, 2023
- November 10, 11, 23, and 24, 2023
- December 25, 2023
- January 1 and 15, 2024
- February 12 and 19, 2024
- March 8, 22, and 31, 2024
- May 27, 2024

### Goals for 2023-2024

The Library continues to employ strategic planning in identifying services, resources, and programming that are responsive to community interests and needs. Guided by this, the Library plans to accomplish the following activities in 2023-2024:

- Complete the Manteca Children's Room renovation.
- Enhance customer experiences with new and updated resources.
- Identify and onboard key staff in succession planning to fill upcoming retirements.

## Fund Balance

### Library Special Revenue Fund

The County maintains a Library Special Revenue Fund (#20018) in which designated revenues are collected and dispersed to the City of Stockton. Fund balance as of March 31, 2023, was \$13,189,672. The projected fund balance on June 30, 2023, is approximately \$17.3 million.

Based on preliminary forecast, it is projected that \$3.2 million will be added to the Library Special Revenue Fund balance in 2023-2024. In 2019-2020 two reserves were created within the Library fund (#20018) (R-19-101):

1. **Operating Reserve** receives an annual contribution of 10% of the operating budget.

### Designated Operating Reserve

2019-2020	\$729,953
2020-2021	693,902
2021-2022	724,200
2022-2023	800,154
2023-2024	755,754

**Total \$3,703,963**

# 6060900000—County Library

## Education

2. **Capital Improvement Reserve** was established with a \$1.0 million contribution in 2019-2020, and receives an annual contribution of 10% of the operating budget.

Designated Capital Improvement Reserve	
2019-2020	\$1,000,000
2020-2021	693,902
2021-2022	724,200
2022-2023	800,154
2023-2024	755,754
<b>Total</b>	<b>\$3,974,010</b>

The remaining \$1.7 million of the \$3.2 million in retained fund balance will be classified as undesignated.

### City of Stockton Fund Balance

Similarly, the City of Stockton operates the City/County Library System through a Governmental Fund. As part of the agreement, the City of Stockton reports this fund balance annually to the County. As of July 1, 2022, the County's portion of the City's Governmental Fund balance for the Library was \$1,950,965. This amount is included in the City Treasury and represents the unspent county funding for the

City/County Library System primarily resulting from carryover savings due to staff vacancies and supply chain delays during recovery from the COVID-19 pandemic. The estimated fund balance at the end of 2022-2023 is \$1,568,275. The estimated fund balance at the end of 2023-2024 is \$1,217,121.

### Funding Request

The 2023-2024 overall Library operating budget for County branches includes an appropriation request of \$7.6 million. The 2023-2024 recommended budget for the County's share includes additional one-time appropriations totaling \$100,000, and new recurring costs of \$41,000. These requests will provide resources for the following items:

One-Time Service/Equipment	Cost
Furniture for Manteca Staff and Children's Area	\$100,000
<b>Total</b>	<b>\$100,000</b>

New Ongoing	Cost
Security guard - Mountain House	\$41,000
<b>Total</b>	<b>\$41,000</b>

Branch Funding				
Library Site or Classification	Site #	Actual 2021-2022	Est./Act. 2022-2023	Proposed 2023-2024
Countywide	807	\$678,675	\$1,025,376	\$729,209
Escalon	808	370,561	408,103	415,611
Lathrop	809	309,340	330,935	326,939
Linden	810	290,896	353,063	322,738
Manteca	811	1,007,806	1,128,010	1,151,442
Mountain House	812	823,709	999,942	1,070,132
Ripon	813	550,750	646,881	729,046
Thornton	814	302,739	312,412	279,378
Tracy	815	1,133,110	1,486,962	1,243,100
<b>Total Branch Funding</b>		<b>\$5,467,586</b>	<b>\$6,691,684</b>	<b>\$6,267,595</b>
Shared Services		1,960,258	1,896,170	1,877,274
New Funding Requests		N/A*	N/A*	141,000
<b>Total Appropriations</b>		<b>\$7,427,844</b>	<b>\$8,587,854</b>	<b>\$8,285,869</b>
County Funding		\$7,240,000	\$8,001,536	\$7,557,536
Available Fund Balance/Charges for Services		\$1,950,965	\$1,568,275	\$1,076,121
<b>Total Revenue</b>		<b>\$9,190,965</b>	<b>\$9,569,811</b>	<b>\$8,633,657</b>

\*Actual expenditures for new funding requests are included in Total Branch Funding above.

# 6060900000—County Library

## Education

Workload Data						
All Branches	Actual			Est./Act.	Projected	
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2023-2024
<i>Library Materials Circulated*</i>	958,744	571,448	1,013,666	1,0643,493		1,117,566
<i>Residents with Library Cards</i>	153,804	133,357	134,988	137,687		147,894
<i>Annual Visits to the Library</i>	578,193	120,679	425,695	576,984		605,883
<i>Program Attendance</i>	60,066	5,831	38,640	63,805		66,995
<i>Computer Use</i>	732,646	5,630	43,925	36,876		38,719
<i>Annual Hours of Service</i>	20,703	21,655	28,692	28,842		28,998
<i>*Includes digital downloads and Link + checkouts that are not included in individual branch counts.</i>						
	Items Checked		Visits		Program Attendance	
	2020-2021	2021-2022	2020-2021	2021-2022	2020-2021	2021-2022
<i>Escalon</i>	11,482	22,246	4,872	14,230	809	3,686
<i>Lathrop</i>	7,285	22,150	2,228	26,372	0	2,047
<i>Linden</i>	5,490	7,075	2,826	5,007	110	409
<i>Manteca</i>	23,055	35,160	11,668	39,925	262	1,427
<i>Mountain House</i>	65,937	138,083	20,488	65,827	2,447	7,101
<i>Ripon</i>	22,938	48,198	9,847	24,202	169	1,950
<i>Stockton Branches</i>	89,048	184,404	47,823	170,727	609	13,476
<i>Thornton</i>	1,899	3,322	2,128	5,051	6	745
<i>Tracy</i>	35,534	88,205	18,612	72,743	1,419	7,799
<i>Bookmobile</i>	1,677	3,837	386	1,611	N/A	N/A
<b>Total</b>	<b>264,345</b>	<b>552,680</b>	<b>120,878</b>	<b>425,695</b>	<b>5,831</b>	<b>38,640</b>

# 6061500000—UC Cooperative Extension

## Education

Brent A. Holtz, Cooperative Extension Director  
[cesanjoaquin.ucanr.edu/](mailto:cesanjoaquin.ucanr.edu/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$298,245	\$324,340	\$379,683	\$379,683	\$55,343
Services & Supplies	83,835	99,544	105,541	105,541	5,997
Centrally-Budgeted Expenses	605,825	497,976	495,644	495,644	(2,332)
Total Expenditures	\$987,905	\$921,860	\$980,868	\$980,868	\$59,008
Expenditure Reimbursements	(4,640)	0	0	0	0
Total Appropriations	\$983,265	\$921,860	\$980,868	\$980,868	\$59,008
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
<b>Net County Cost</b>	\$983,265	\$921,860	\$980,868	\$980,868	\$59,008
<b>Allocated Positions</b>	4.0	4.0	4.0	4.0	0.0

## Purpose

Cooperative Extension (CE) is a nationwide system for non-formal education established by Congress in 1914 to improve America's agriculture and natural resources, youth development, and family nutrition education. CE's mission is to help all segments of the community benefit from the scientific advances made locally and at the nation's land grant universities.

The University of California Cooperative Extension (UCCE) in San Joaquin County brings research, educational programs, and innovative solutions to growers, families, and communities in the County. Programs are carried out by university professionals and highly trained and dedicated community volunteers. Although not mandated, County support is governed by Education Code Section 32330 and a 1960 Memorandum of Understanding (MOU) between the Regents of the University of California (UC) and the County of San Joaquin. The total program budget is supported by the University, Advisor generated State and Federal grants, and the County.

## Board Strategic Priorities 2022-2023 through 2024-2025

The priorities below represent the UC's Division of Agriculture and Natural Resources (UC ANR) strategic vision, which will be in effect until 2025. The following highlights provide an overview of several projects, programs, and activities administered by the UCCE.

Economic Development			
Direct Education Outreach	Current	Target	Deadline
➤ UC Cal Fresh Healthy Living will promote healthy living, food resource management, and physical activity through onsite classes to eligible residents in San Joaquin County.	2,708 Students	2,800 2,900 3,000	September 2023 September 2024 June 2025

# 6061500000—UC Cooperative Extension

## Education

Community Engagement	Current	Target	Deadline
➤ UC Cal Fresh Healthy living will work in community sites, conducting classes to put sustainability measures in place to ensure healthy eating and physical activity are practiced and continued.	3 sites, 25 reports	4 sites, 27 reports 5 sites, 28 reports	September 2024 June 2025
Educational Events and Newsletters	Current	Target	Deadline
➤ UC Advisors provide growers in San Joaquin County with newsletters, field days, and educational workshops on economic and sustainable practices.	28,000	30,000	September 2023
UC Conducted Research Projects in Commodities	Current	Target	Deadline
➤ Research projects conducted by UC Farm Advisors. A Viticulture Advisor was hired in 2023 that will increase projects.	41 43	43 45	September 2023 September 2024
Clientele Contact in Agriculture	Current	Target	Deadline
➤ UC Farm Advisors will provide direct one-on-one technical assistance to San Joaquin County growers.	11,900 12,000 13,000	12,000 13,000 14,000	September 2023 September 2024 June 2025

## Major Budget Changes

### Salaries & Employee Benefits

- \$55,343 Salary and benefits adjustments.

### Services & Supplies

- \$4,032 Increase in fleet services costs.

### Centrally-Budgeted Expenses

- \$3,106 Increase in Casualty insurance costs.
- (\$8,020) Cost Allocation Plan adjustment.

## Program Discussion

The 2023-2024 recommended budget for the University of California Cooperative Extension (UCCE) totals \$980,868, which is an increase of \$59,008 from the 2022-2023 adjusted budget.

The County provides funding for UCCE by providing clerical and technical staff, operational support, and office facilities as established in the MOU between UC and the County. Through its partnership with the County, UCCE is able to leverage nearly \$5.0 million in State and Federal funding for competitive research grants into the County to support its agricultural research mission. CE Advisors are renowned locally, Statewide, nationally, and internationally as leaders and are invited to speak on research that is generated in the County.

In addition, individual grower co-operators, agricultural organizations, allied agricultural industries, and commodity boards provide in-kind support in the form of commodity research grants, land, labor, equipment, and materials necessary for conducting research in the County. UCCE also receives funding from the United States Department of Agriculture (USDA), and the California Department of Food and Agriculture (CDFA).

The UCCE Farm Advisors and Field Technicians are involved with critical agricultural research in the County, diagnosing crop production problems, detecting crop pests,

# 6061500000—UC Cooperative Extension

## Education

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and providing growers with critical information, in order to protect food safety and ensure the continuity of food supplies, especially during the COVID-19 pandemic. Advisors continued to make farm visits while social distancing with growers and other clientele.

### Agricultural Programs

CE Advisors are actively engaged in sustaining the County's \$3.0 billion agriculture industry. The major agricultural commodities produced are assigned to Advisors who coordinate problem-solving research and educational programs that address major issues in order to improve production, economic viability, and environmental sustainability. In 2022-2023, advisors conducted 72 research projects on 41 different commodities in the County.

The following are the 2022-2023 UCCE program highlights:

- Studied the viability of fungal pathogen fruiting bodies and dispersal in cherry orchards which will help evaluate the potential of whole orchard recycling for cherry orchards in California.
- Conducted whole orchard recycling (WOR) study in almond, walnut, and cherry orchards to determine the survivability of fungal pathogens. WOR has improved soil organic matter, yield, soil health, and air quality.
- Investigated the impacts of different nitrogen treatments on first-year cherry tree growth after orchard recycling.
- Collaborated with researchers from other onion-growing states to develop management strategies to combat bacterial bulb rot disease of onions. Goals of this large USDA-funded project are to give growers better information on management strategies, and to support the onion seed industry's attempts to breed more resistant cultivars.
- Worked with County potato producers and UC Davis researchers to evaluate ways to improve management of southern blight, a fungal disease that can rot potato tubers just prior to harvest.
- Continued to work closely with growers and the vegetable seed industry to evaluate processing tomato varieties in County commercial fields to provide growers and processors with information on variety performance under our local conditions. In particular, they have been assessing how varieties perform in fields with Fusarium, a disease that is having devastating impacts in local fields.
- Conducted evaluation of tomatoes grafted onto vigorous disease-resistant rootstocks to increase yields and reduce losses due to soil-borne disease. In local processing tomato field trials, advisors have demonstrated yield increases of up to 30%. Adoption of tomato grafting could also lead to reductions in use of fumigant pesticides, which is a high priority for the State's Department of Pesticide Regulation.
- Evaluated rice, wheat, field corn varieties, and pest management practices for the Delta. Growers receive the latest information for their local conditions. Growers can make informed decisions on agronomic practices that can result in higher yields and better economic outcomes.
- Evaluated soil salinity and biological conditions in alfalfa to understand how reduced irrigation impacts soil quality. In the face of drought, this evaluation will provide information on how water curtailments may impact soil quality.
- Observed cover cropping and conservation management practices in the Delta for impacts on soil quality and greenhouse gas emissions.
- Continued to partner with the San Joaquin County Water Coalition to implement safer pest management practices that address water quality issues in the County watershed, as mandated by the State.
- Worked with the County Agricultural Commissioner to establish the Ag Livestock Pass for San Joaquin County and host the mandatory training to obtain the Ag Livestock Pass.
- Worked with the Plant Material Center to identify warm season perennials (C4 plants) that can be productive on Northern San Joaquin Valley irrigated pastures and then plant on local ranches to determine palatability. This will help enable ranchers to adapt to hotter summers and less irrigation water in the future.
- Worked with local sheep producers and orchards to conduct a multi-prong approach on integrated livestock/crop systems, specifically using sheep to terminate cover crops, testing for fecal pathogens, and developing cost studies.
- Conducted annual educational workshops for ranchette owners to improve natural resources and safeguard water quality.
- Demonstrated that cherry's major fruit fly pest is becoming tolerant to commonly used insecticides and suggested rotational products to slow resistance.
- Determined the active flying period of the Flatheaded Borer of walnut and suggested cultural control practices.
- Developed and extended educational materials describing manure management practices that reduce



# 6061500000—UC Cooperative Extension

## Education

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greenhouse gas emissions, allow better management of manure nutrients to cropland, improve water use efficiency, and ultimately improve water quality: <https://cdqap.org/amp-outreach-project/>

- Determined byproduct feeding trends and opportunities in the dairy industry to increase feeding program resiliency in the face of water uncertainty.
- Collaborated with industry stakeholders on vine mealybug control efforts using an integrated pest management approach to assess effectiveness.
- Monitored the spread of grapevine leafroll-associated viruses in vineyards with different vine mealybug control methods.
- Assessed the impact of vineyard ant control on the spread of grapevine leafroll-associated viruses.

### 4-H Youth Development Program

The 4-H Program is an innovative research-based youth development program designed to build confidence, learn responsibilities, develop life-long skills, enhance knowledge and social values, and promote community citizenship activities that help develop leadership skills. There are currently 98 adult volunteers and 547 youth members.

Throughout the year, the Program continued with a virtual platform, then shifted to in-person events and held a Clover Field Day, a Fun Fair, and 4-H Camps which resulted in hundreds of youth participants. The Program also rewarded 11 college scholarships to 4-H youth totaling \$11,500.

### Master Gardener (MG) Program

The MG Program emphasizes sustainable gardening practices such as composting and green waste diversion, gardening for pollinators and beneficial insects, edible gardening, drought tolerant landscaping, water conservation and water quality, pest management, and many other topics. Since July 2007, the MG Program has volunteered over 74,000 hours of community service to the County at a UC-calculated value of \$2,214,892 (\$30/hour). Since 2007, MGs have earned 21,390 continuing education hours and are projected to earn 1,300 CE hours in 2022-2023. Currently there are 122 active volunteers.

### Master Food Preserver (MFP)

The UC MFP Program is a public service community outreach providing up-to-date information on food safety and preservation methods. An MFP is a volunteer who is formally educated in food preservation/safety and is certified by the UCCE. Volunteers are qualified to teach research-based food preservation/safety in addition to disseminating that information via lectures and other County events.

There are currently 10 MFPs who have volunteered 9,435 hours to the community since 2013, valued at \$282,578. From July 2022 to March 2023, MFPs volunteered over 282 hours, and anticipate reaching a total of 400 hours by June 30, 2023. MFPs have earned 2,055 hours of CE hours since 2013.

### Viticulture Program

The viticulture program focuses on informal education, field research, and problem diagnosis. With the cooperation of the Lodi-Woodbridge Winegrape Commission UCCE conducts regular grower meetings as well as the annual Lodi Grape Day that helps inform growers and the community about the latest progress in research. Field research includes experiments in resistant rootstocks for soil pests, variety and clone evaluation trials, trellis system comparisons, pest management with environmentally safe chemicals, and vineyard irrigation management for increased quality.

Due to the expansion of the UCCE's program, Dr. Justin Tanner was hired in January 2023 as the new Regional Viticulture Advisor. Dr. Tanner is headquartered in San Joaquin County and oversees the San Joaquin Valley region.

### Nutrition, Education, Research, & Outreach

UC's CalFresh Healthy Living (CFHL) and the Expanded Food and Nutrition Education Programs (EFNEP) are designed to prevent childhood obesity, prevent chronic diseases, reduce health disparities, improve consumer food safety practices, and reduce hunger and food insecurity. Improvement in one or more of these areas translates to better outcomes for County residents and a reduction in related economic impacts at the County, State, and national levels.

In 2022-2023, CFHL and EFNEP continued to partner with community-based organizations, preschools, and after-school programs. CFHL reached 670 low-income adults and 2,056 youth with direct nutrition education (workshops or classroom lessons). In addition, 290 low-income participants were reached indirectly through health fairs, while 2,038 youth and adults benefited from CFHL environmental change activities (policies, gardens, and structured physical activity). EFNEP reached over 220 eligible adults while improvement was made in three priority areas: food security 83%, food resource management 95%, and diet quality 95%. The CFHL and EFNEP programs continue to be part of the County's Community Health Improvement Plan.

## Fund Balance

### 4-H Youth Development Trust Fund

UCCE maintains the 4-H Youth Development Trust Fund (#81603), to be utilized on 4-H educational programs. As of March 31, 2023, the Trust Fund balance totaled \$1,556. This



# 6061500000—UC Cooperative Extension

## Education

Trust Fund has not been utilized since 2016-2017 and its use is not anticipated during 2023-2024.

### Farm Advisors Research Trust Fund

UCCE maintains the Farm Advisors Research Trust Fund (#81604), to be utilized by the Farm and Home Advisors in conducting needed agricultural research within the area of responsibility of the Cooperative Extension Service. As of March 31, 2023, the Trust Fund balance totaled \$40,286. The 2023-2024 recommended budget does not include any transfers from this fund.

### Supplemental Requests

UCCE is requesting \$8,444 to support the increase in communications and motor pool charges, the purchase of computer equipment, and water filtration services. During the past several years, there has been a savings in services and supplies; however, due to the increase in UCCE personnel during 2022-2023, remaining funds have been used to support these positions. Going forward, the UCCE budget will not be able to absorb these additional costs.

The recommended budget has been augmented by \$8,444 to address this request.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
<b>UC Advisors/Staff</b>					
<i>Number assigned to SJC</i>	20.4	20.4	19.1	20.8	19.84
<i>Research Projects</i>	75	80	79	71	63
<i>Different Commodities</i>	37	37	41	41	37
<b>Agricultural Programs</b>					
<i>Clientele Contacts</i>	13,391	14,640	13,385	11,900	13,330
<i>Meeting Attendance</i>	14,778	15,780	13,580	11,970	12,000
<i>Newsletter Circulation</i>	27,951	29,446	30,162	28,120	27,307
<i>Publication Distribution*</i>	233,600	232,200	235,600	248,400	239,496
<b>4-H Youth Development Program</b>					
<i>4-H Youth Members</i>	1,300	1,350	541	700	600
<i>Volunteer Adults</i>	254	250	164	200	100
<b>Master Gardener Program</b>					
<i>Volunteers</i>	185	170	125	122	127
<i>Volunteer Hours (includes CE hours)</i>	5,500	1,100	5,250	6,100	7,000
<b>Master Food Preserver Program</b>					
<i>Volunteers</i>	30	27	12	10	15
<i>Volunteer Hours (includes CE hours)</i>	1,250	400	400	400	700
<b>Nutrition, Education, Research, &amp; Outreach</b>					
<i>Adults attending workshops</i>	2,475	2,100	1,200	1,350	1,120
<i>Curriculum Distribution &amp; Support to Low Income School/Teachers</i>	87S/167T	130S/410T	127S/287T	130S/290T	85S/105T

\*Reflects "Almond Tasks" section of the Pacific Nut Producer magazine with a distribution of 132,000 annually.



ADOPTED BUDGET

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*Parks and Recreation*

## ***Parks & Recreation***

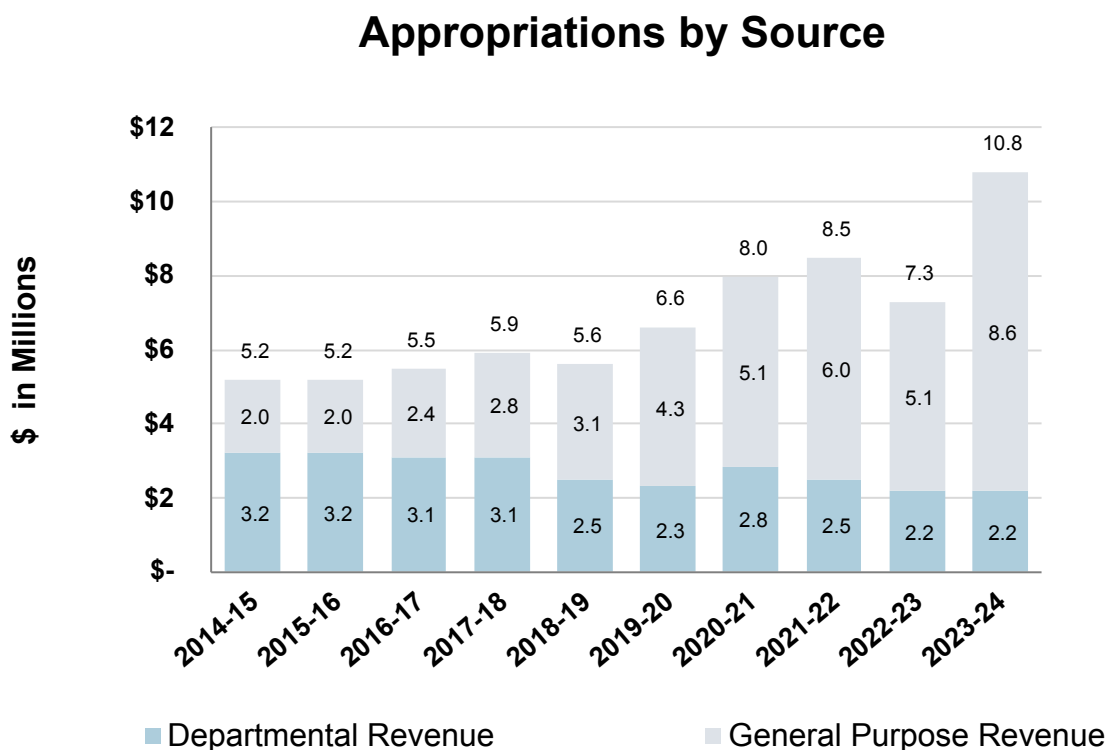
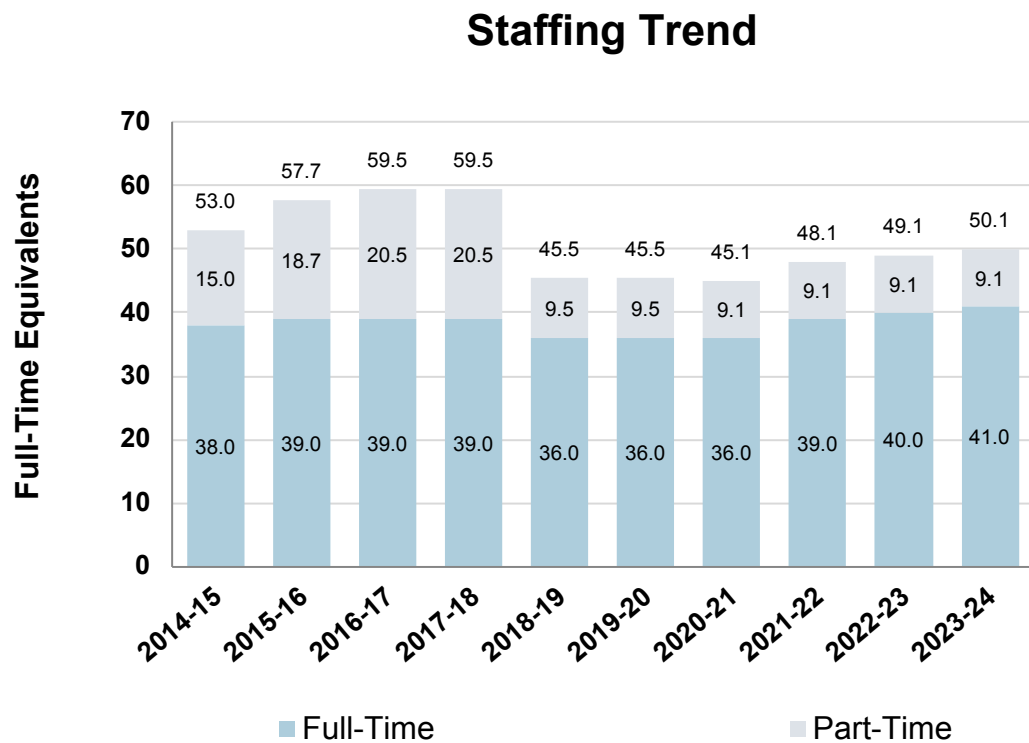
### ***Appropriations***

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			<b>Page Number</b>	<b>2022-2023 Adjusted</b>	<b>2023-2024 Requested</b>	<b>2023-2024 Adopted</b>	<b>Increase/ (Decrease)</b>
<i>7070300000</i>	<i>General Services-Parks &amp; Recreation</i>		I-4	\$6,705,845	\$8,557,315	\$8,557,315	\$1,851,470
<i>7070800000</i>	<i>Cultural Services</i>		I-9	628,557	2,253,253	2,253,253	1,624,696
<b><i>Total - Parks &amp; Recreation</i></b>				<b>\$7,334,402</b>	<b>\$10,810,568</b>	<b>\$10,810,568</b>	<b>\$3,476,166</b>

# Parks & Recreation

## Appropriations

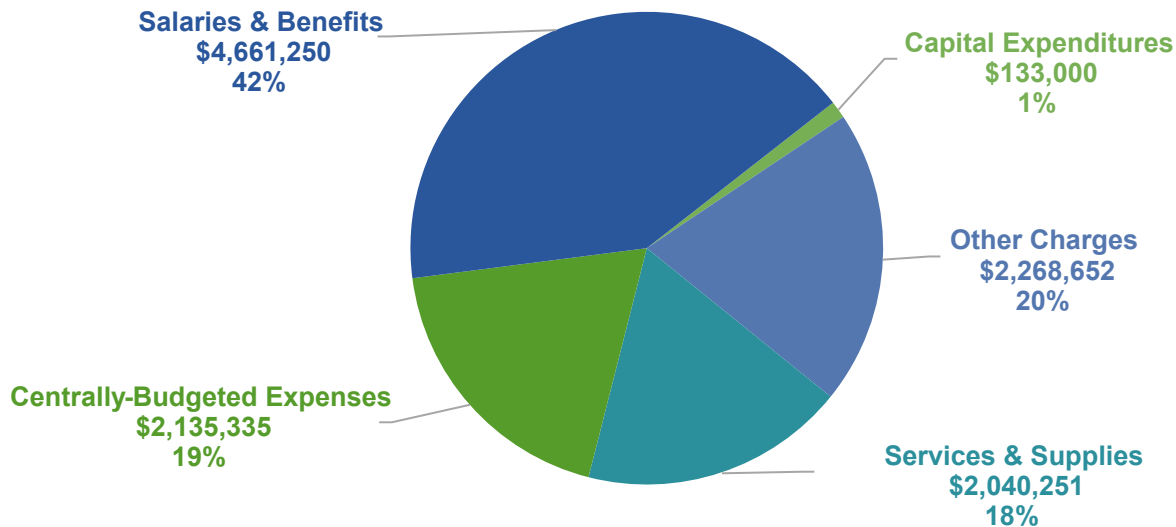


# Parks & Recreation

## Appropriations

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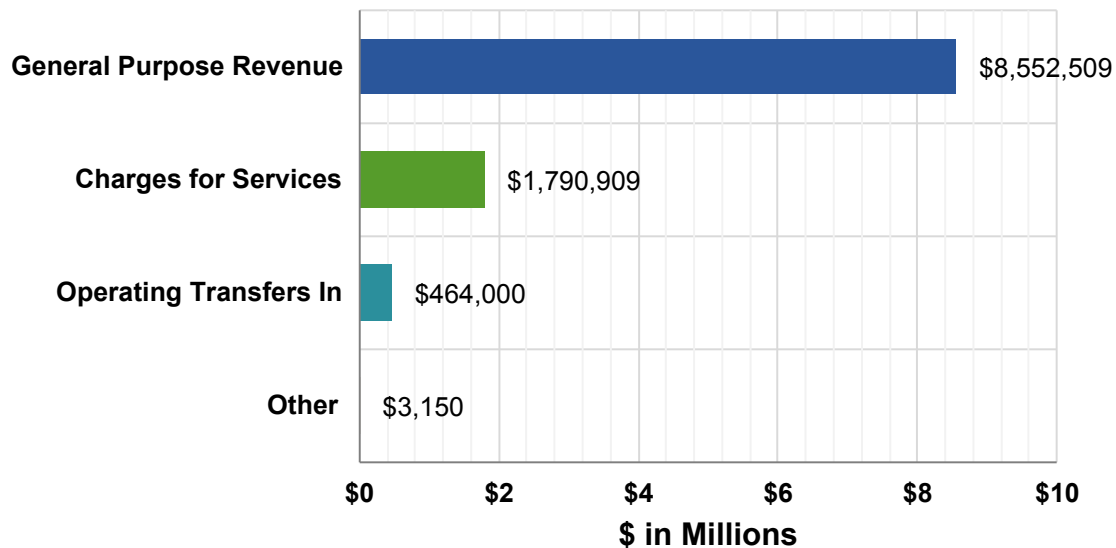
### Use of Funds 2023-2024 Adopted Budget Total Appropriations \$10,810,568



\* \$11,238,488 Expenditures less \$427,920 Cost Reimbursements

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### Source of Funds 2023-2024 Adopted Budget Total Revenue \$10,810,568



# 7070300000—General Services-Parks & Recreation

## Parks & Recreation

Marcia Cunningham, General Services Director  
[www.siparks.com/](http://www.siparks.com/)

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Salaries & Benefits	\$3,690,578	\$4,192,833	\$4,661,250	\$4,661,250	\$468,417
Services & Supplies	1,619,140	1,812,575	2,040,251	2,040,251	227,676
Centrally-Budgeted Expenses	2,294,877	926,754	2,135,335	2,135,335	1,208,581
Other Charges & Uses	18,305	15,399	15,399	15,399	0
Capital Expenditures	108,269	144,500	133,000	133,000	(11,500)
Total Expenditures	\$7,731,169	\$7,092,061	\$8,985,235	\$8,985,235	\$1,893,174
Expenditure Reimbursements	(341,904)	(386,216)	(427,920)	(427,920)	(41,704)
Total Appropriations	\$7,389,265	\$6,705,845	\$8,557,315	\$8,557,315	\$1,851,470
<b>Earned Revenues By Source</b>					
Interest/Rents	\$713	\$1,200	\$1,200	\$1,200	\$0
Charges For Services	1,838,247	1,822,572	1,790,909	1,790,909	(31,663)
Miscellaneous Revenues	40,690	1,950	1,950	1,950	0
Operating Transfers In	212,845	400,500	464,000	464,000	63,500
Total Revenues	\$2,092,495	\$2,226,222	\$2,258,059	\$2,258,059	\$31,837
<b>Net County Cost</b>	\$5,296,770	\$4,479,623	\$6,299,256	\$6,299,256	\$1,819,633
<b>Allocated Positions</b>	39.0	40.0	41.0	41.0	1.0
<b>Temporary (Full-Time Equivalent)</b>	9.1	9.1	9.1	9.1	0.0
<b>Total Staffing</b>	48.1	49.1	50.1	50.1	1.0

## Purpose

The Parks and Recreation Division of the General Services Department (GSD) plans, develops, operates, and maintains a system of regional parks; maintains the landscaping at various County-owned facilities and community parks; and manages eight County Service Area (CSA) parks. These activities are not mandated; however, County parks developed using State or Federal funds must be maintained for public recreation services.

## Major Budget Changes

### Salaries & Employee Benefits

- \$383,934 Salary and benefits adjustments.
- \$84,483 Add an Animal Care Specialist.

- \$78,438 Increase in consultant services costs.
- \$29,270 Increase in fleet services costs.
- \$21,074 Increase in allocated cost for General Services Administration.
- \$20,000 Increase in lease costs for sports field line marking equipment.

### Services & Supplies

- \$109,632 New costs for reimbursement of a Crafts Worker III in the Facilities Management budget.

- (\$33,500) Decrease in maintenance of structures and grounds costs.

# 7070300000—General Services-Parks & Recreation

## Parks & Recreation

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### Centrally-Budgeted Expenses

- \$96,318 Increase in Workers' Compensation and Casualty insurance costs.
- \$1,113,014 Cost Allocation Plan adjustment.

### Capital Expenditures - Equipment

- \$67,500 Wood chipper.
- \$47,500 Trash compacting trailer.
- \$18,000 Rodent control machine.

### Cost Reimbursements

- \$41,704 Increase in reimbursements for maintenance of Community Service Areas.

### Revenues

- (\$31,663) Decrease in concessionaire fees due to closure of Fun Town at Micke Grove Regional Park.

### Operating Transfers In

- \$65,500 Increase in transfers from Parks Special Projects and American Rescue Plan Act (ARPA) funds for projects and equipment.

## Program Discussion

The 2023-2024 recommended budget for Parks and Recreation (Parks) totals \$8,985,235, which is an increase of \$1,893,174 from the 2022-2023 adjusted budget.

### California Severe Winter Storms

San Joaquin County proclaimed a local emergency on January 1, 2023, due to a series of storms in an Atmospheric River, which began around December 28, 2022. On January 4, 2023, the Board of Supervisors ratified the proclamation (R-23-1). Departments and agencies throughout the area responded for over 14 days to reports of downed power lines, fallen trees, roadway issues, localized flooding, evacuations, and rescues.

On January 18, 2023, the County was added to the Department of Homeland Security, Federal Emergency

Management Agency major disaster declaration for the State of California, approving Individual Assistance and again on February 1, 2023, approving all categories of Public Assistance.

During the winter storm events, the Parks and Recreation Division sustained damages at a majority of the regional and community parks. Damages include flooding, debris, fallen and damaged trees, power outages, electrical issues, and property damage. Parks that sustained major damage include Micke Grove Regional Park (including the Japanese Garden), and Westgate Landing Regional Park/Campground. Parks that sustained moderate damage include Oak Grove Regional Park, Dos Reis Regional Park/Campground, and Micke Grove Golf Links. The remainder of parks sustained incidental damages.

In response to the winter storm events, the Parks and Recreation Division closed all regional and community parks temporarily in January 2023. Portions of Micke Grove and Westgate Landing Parks facilities may remain closed through the remainder of the calendar year. Intermittent closures of parks may occur to complete necessary repairs. The Parks and Recreation Division will seek reimbursement of funds expended on eligible emergency activities and repairs from State and Federal sources.

### Cost of Parks Operation

The Division currently operates 20 parks, one of which includes the Micke Grove Zoo. The total Net County Cost (NCC) for Parks and Recreation totaled \$5,296,770 in 2021-2022. A majority of the County Parks' ongoing maintenance and operations costs are partially funded with General Fund dollars. Of the 20 maintained parks in the system, the following four parks and the nature center do not generate revenue in the form of user fees, assessments, or tax revenue:

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#### Non-Revenue Generating Operations

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1. Gianone Park  
1885 E. Harding Way, Stockton
2. West Jackson Park  
Sanguinetti Lane and Webb Street, Stockton
3. Kennedy Park  
2800 S. D Street, Stockton
4. Woodbridge Wilderness Area  
301 River Meadows Drive, Woodbridge
5. Oak Grove Regional Park Nature Center  
4520 W. Eight Mile Road, Stockton

# 7070300000—General Services-Parks & Recreation

## Parks & Recreation

The 2021-2022 NCC support for each park was as follows:

Park	2021-2022 NCC
Boggs Tract Park (CSA 1)	\$31,308
Dos Reis Park (CSA 4)	3,733
Eastside/Garden Acres Park (CSA 3)	247,406
Gianone Park	50,582
Harmony Grove Church	38,033
Kennedy Park	142,509
Larch Clover Park (CSA 11)	19,788
Madison Park (CSA 2)	42,708
Micke Grove Regional Park	1,346,315
Micke Grove Zoo	1,996,959
Mossdale Crossing Park	55,105
Oak Grove Nature Center	984
Oak Grove Regional Park	849,592
Raymus Village Park (CSA 5)	13,916
Regional Sports Complex	330,311
Stillman L. Magee Park	47,466
Taft Park (CSA 8)	33,371
West Jackson Park	32,946
Westgate Landing	93,602
Woodbridge Community Park (CSA 48)	8,037
Woodbridge Wilderness Area	15,690
Subtotal	\$5,400,361
Miscellaneous Reimbursements	(103,591)
<b>Total</b>	<b>\$5,296,770</b>

In 2023-2024, approximately 70% of total recommended expenditures will be funded by NCC, with the remainder to be funded by a combination of operating transfers from funds, charges for services, and a small reimbursement of expenditures.

### Parks Funds

County parks are supported by revenue from General Fund Special Accounts and Special Revenue Funds established for their maintenance and operation. Fund account income from all sources for 2023-2024 is estimated to be \$436,500.

Account Income	Fund	Amount
Micke Grove	16705	\$300,000
Park Development	16709	25,000
Park Donations	16701	5,000
Park Endowment	16702	101,500
Parks Activity	16707	5,000
<b>Total</b>		<b>\$436,500</b>

The following table includes the estimated fund balances at the end of 2022-2023 and 2023-2024:

Fund	Estimated Balance	
	6/30/2023	6/30/2024
Micke Grove*	\$476,475	\$561,475
Park Development	128,296	153,296
Park Donations*	42,648	42,648
Park Endowment*	523,363	574,363
Park Special Projects	1,937,832	1,817,332
Parks Activity*	10,515	9,515
<b>Total</b>	<b>\$3,119,129</b>	<b>\$3,158,629</b>

*\*Revenue from these funds to be used for 2023-2024 ongoing operations.*

The recommended budget includes transfers of \$276,000 for ongoing Parks operations and \$140,500 for Parks and Zoo equipment and special projects, for a total of \$416,500. In addition to interest, the proposed transfers include the use of approximately \$50,000 of the principal balance of the Park Endowment fund. As per policies and procedures relating to the Parks Special Projects fund, the Board of Supervisors must approve all expenditures.

2023-2024 Planned Expenditures	Amount
Wood Chipper (Oak Grove)	\$67,500
Parks Administration Office Reconfiguration	35,000
Sports Field Line Marking Robot	20,000
Rodent Control Machine (all parks)	18,000
<b>Estimated Total*</b>	<b>\$140,500</b>

*\*Unused balance to remain in Fund.*

### Micke Grove Zoo Five-Year Strategic Plan

The Division presented the Micke Grove Zoo Five-Year Strategic Plan to the Board of Supervisors on February 23, 2021, in response to the 2018-2019 San Joaquin County Grand Jury report entitled "Micke Grove Zoo: Honoring the Past, Securing the Future 2018-2019" (Case No. 0218). The Plan identified seven priority objectives, with strategies and tasks, and established a schedule. The priority objectives are Infrastructure, Exhibits, Guest Experience, Nonprofit Partner, Revenue, Accreditation, and Volunteer Program. The objectives have served as the foundation to achieve the strategies and tasks outlined per year for each priority area.

Tasks completed in 2022-2023 include Phase II of the electrical upgrade plan, the Micke Grove Zoo east end conceptual plan, exhibit improvement plan, portion of high priority deferred maintenance items, offsite holding



# 7070300000—General Services-Parks & Recreation

## Parks & Recreation

area/quarantine plan, and the selection of the accreditation body. The Strategic Plan is reviewed annually in order to stay up-to-date with the changing needs of Micke Grove Zoo.

### Priority Objectives - Tasks Planned For 2023-2024

#### 1. Infrastructure

- Phase III electrical upgrade plan
- Water/Sewer/Drainage study
- Continuation of high priority deferred maintenance repairs

#### 2. Exhibits

- Begin implementation of exhibit improvements

#### 3. Guest Experience

- Long-term refreshment solution
- Identify interactive exhibit opportunities
- Educational programming plan
- Identify Gift Shop opportunities

#### 4. Nonprofit Partner

- Relationship building with donors, guests, public and outside agencies

#### 5. Revenue

- Identify corporate sponsorship opportunities

#### 6. Accreditation

- Identify standards of accrediting body

#### 7. Volunteer Program

- Write policies and procedures for the Volunteer and Internship program
- Implement volunteer database

### Parks Five-Year Strategic Plan

On December 14, 2021, the Parks and Recreation Division presented the Parks Five-Year Strategic Plan to the Board of Supervisors. The plan identified six priority objectives, with strategies and tasks, and established a schedule. The priority objectives are Infrastructure, Maintenance, Staff, Guest Experience, Facilities, and Revenue. The objectives will serve as the foundation to achieve the strategies and tasks outlined each year. Tasks completed in 2022-2023 include the Oak Grove lake bank restoration, Regional Sports Complex drainage repairs and light pole removal, Delta shelter septic replacement at Micke Grove, and Larch Clover park remodel project planning. The Strategic Plan will be reviewed annually in order to stay up-to-date with the changing needs of San Joaquin County Parks.

Each year departments are asked to assess facility needs and submit projects to GSD. Parks and Recreation requested

projects in alliance with the Micke Grove Zoo and Parks Five-Year Strategic Plans. GSD has recommended proceeding with the following projects during 2023-2024, with an estimated cost of \$4.1 million, to be funded by the Capital Outlay Fund (#37004). On October 12, 2021, the Board of Supervisors approved the transfer of \$8.0 million from the American Rescue Plan Act Fund (ARPA) to the Capital Outlay Fund (B-21-613) for water and sewer infrastructure projects at community and regional parks, County service areas, and community centers.

The following projects are included in the recommended Public Improvement budget (#1040148000):

- Design and construct a miniature golf course at Micke Grove Regional Park.
- Upgrade the overflow parking lot at Oak Grove Regional Park.
- Create an up-to-date map of all utilities at Micke Grove Regional Park and Zoo, Oak Grove Regional Park, and Regional Sports Complex.
- Install self-cleaning smart restroom at Kennedy Park, Taft Parks, and Garden Acres Park.
- Commission a well and pump study at all park locations with recommended repairs.
- Install new entrance signage at Micke Grove Regional Park.
- Micke Grove Regional Park and Zoo connection to City of Lodi water and sewer utility service. Phase I to include the development of project scope, architectural and engineering, cost analysis, and schedule.
- Develop preliminary design concepts for a new South County Regional Park.

### Supplemental Requests

The Director of GSD is requesting supplemental funding in the amount of \$244,115 for the following:

#### Animal Care Specialist

Funding of \$84,483 is requested to add an Animal Care Specialist to provide additional support at Micke Grove Zoo. Additional tasks will include compliance with new United States Department of Agriculture regulations and standards governing the humane handling, care, treatment, and transportation of birds covered by the Animal Welfare Act (AWA). Current AWA licensees and registrants must comply by August 21, 2024.

# 7070300000—General Services-Parks & Recreation

## Parks & Recreation

### Arborist Services

Funding of \$50,000 is requested for additional arborist services. During the California Severe Winter Storm events, the Parks and Recreation Division lost over 160 trees. Although emergency debris removal began immediately, clean-up and tree/stump removal will continue throughout the fiscal year. The increase in professional services for arborist work will include tree/stump removal, branch or limb removal, and health and safety assessments of remaining trees.

### Crafts Worker III

Funding of \$109,632 is requested to reimburse the Facilities Management Division budget (#1014200000) for the costs of

a dedicated Crafts Worker III. The Parks and Recreation Division routinely utilizes Crafts Workers for the repair and maintenance of park buildings, restrooms, caretaker residence, zoo buildings and exhibits, and other structures located throughout San Joaquin County. An increase in facility related maintenance and repair projects relating to the Micke Grove Zoo and Parks Five-Year Strategic Plans has required a Crafts Worker be assigned to parks and the zoo facilities on a consistent basis. A dedicated Crafts Worker III will have the expertise specific to park and zoo-related items and will reduce labor, materials, and operational down time.

The recommended budget has been augmented by \$244,115 to address these requests.

### Workload Data

	Actual			Est./Act.	Projected
	2019-2020*	2020-2021*	2021-2022*	2022-2023	2023-2024
<b>Park Visitors**</b>					
<i>Dos Reis Park</i>	37,731	32,503	51,979	44,960	49,213
<i>Micke Grove Regional Park</i>	239,532	57,651	372,870	369,747	393,476
<i>Micke Grove Zoo</i>	40,007	4,304	59,570	60,416	63,881
<i>Mossdale Landing</i>	23,259	23,186	28,923	28,090	29,897
<i>Oak Grove Park</i>	107,587	44,976	147,065	147,287	149,315
<i>Regional Sports Complex</i>	52,106	4,571	120,435	92,207	95,671
<i>Stillman Magee Park</i>	12,567	5,324	13,211	11,501	12,331
<i>Westgate Landing</i>	14,413	9,307	10,681	8,963	5,464
<b>Total Park Visitors</b>	<b>527,202</b>	<b>181,822</b>	<b>804,734</b>	<b>763,171</b>	<b>799,248</b>

\*Data reflects COVID-19 park, zoo, and facility closures, restrictions, and modifications.

\*\*Park visitor methodology includes 3.5 visitors per vehicle standard.

7070800000—Cultural Services

Parks & Recreation

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<i>Expenditures</i>					
<i>Other Charges &amp; Uses</i>	\$577,348	\$628,557	\$2,253,253	\$2,253,253	\$1,624,696
<i>Total Appropriations</i>	\$577,348	\$628,557	\$2,253,253	\$2,253,253	\$1,624,696
<i>Earned Revenues By Source</i>	\$0	\$0	\$0	\$0	\$0
<i>Net County Cost</i>	\$577,348	\$628,557	\$2,253,253	\$2,253,253	\$1,624,696

Purpose

This budget contains contributions to organizations that provide cultural services.

The San Joaquin County Historical Society & Museum (SJCHSM) acquires, conserves, and manages historic buildings, artifacts, and documents owned by the County. In addition, the SJCHSM has a contractual arrangement with the County to operate the museum located in Micke Grove Park and provide public access, exhibits, and educational services at the museum.

Major Budget Changes

Other Charges

- \$1,600,000      Establish appropriations for matching funds for Pioneer Village.
- \$70,000          Increase in base funding for SJCHSM.
- (\$45,304)        Decrease in one-time funding to various non-County organizations.

insurance, and waiver of parking fees for SJCHSM members and volunteers.

The County contribution of \$653,253, excluding the in-kind County support services, represents approximately 50.3% of the SJCHSM 2023-2024 operating budget of \$1,299,159. Expectations of the County are that the SJCHSM would continue to accomplish the following objectives:

1. Mark historical sites and stimulate research in the cultural and natural heritage of the County.
2. Assist the County in the collection, restoration, and preservation of historical materials and to make these available to the public through the operation of the museum. This would include maintaining a comprehensive inventory and catalog of existing collections, new acquisitions, and disposing of those no longer of value.
3. Undertake programs and activities, including museum operations and educational tour programs, which provide for the collection, preservation, and interpretation of the history of the County; the surrounding area; and the history of all cultures and heritage of all people.
4. Capitalizing, where possible, on reimbursement for services provided.

Program Discussion

The 2023-2024 recommended budget for Cultural Services totals \$2,253,253, which is an increase of \$1,624,696 from the 2022-2023 adjusted budget.

San Joaquin County Historical Society & Museum

The 2023-2024 County contribution to San Joaquin County Historical Society & Museum (SJCHSM) is \$653,253 and reflects an increase in base funding to support costs associated with preserving and storing a large collection of County records and administrative costs associated with archival consultations and other museum operations. An appropriation of \$1.6 million is also included for matching funds for Pioneer Village as directed by the Board of Supervisors during the Final Budget Hearing. Separately, the budget includes in-kind County support services of approximately \$213,745 for facilities and grounds maintenance, irrigation and potable water, liability

2021-2022 Volunteer Hours of Service	
Board of Trustees	1,050
Docent Council	8,113
Friends of the Museum	270

# 7070800000—Cultural Services

## Parks & Recreation

Temporary Events*	1,612
Tractor & Ag Equipment	325
Valley Days*	3,670
<b>Total</b>	<b>15,040</b>

\*Categories of volunteerism not previously tracked.

2021-2022 Museum Visitation	
Weekends	5,382
Weekdays*	3,029
Tours	6,600
<b>Total</b>	<b>15,011</b>

\*Inclusive of Valley Days, event rentals, and membership programming.

In 2022-2023, the SJCHSM has preserved artifacts and presented programs associated with the history of San Joaquin County. The SJCHSM conserved artifacts associated with the County's heritage, including the 1848 Charles Weber Cottage, over 100,000 documents and photos representing local history, the records of County Departments such as the County Supervisors, County Assessor, and County Sheriff, and large holdings of agricultural, industrial, and cultural artifacts. The SJCHSM also provided educational programs, such as Valley Days, the Festival of Trees, exhibits, and creative-aging programs for its membership and volunteers.

As of April 30, 2023, the number of memberships for the SJCHSM was 977, representing a 67% increase from 2021-2022, indicative of a dedicated membership program. In 2021-2022, the SJCHSM reopened from a COVID-induced hiatus, and in 2022-2023 the institution revived programming to pre-COVID status. As the Docent Council grew from 86 to 90 dedicated volunteers, and as schools and tour groups have returned to the Museum, SJCHSM volunteer hours and visitor numbers have reached 10-year peaks. Volunteer hours in particular reached all-time highs, as new categories are being tracked and docent support has remained steady. The Board of Trustees, responsible for corporate governance, grew from 19 to 22 members in 2022-2023 and averaged a 75% attendance rate for the year.

The SJCHSM Collections & Archives Department implemented a strong year of programming during 2021-2022. The collections team acquired and preserved 150 collections, including the original copy of the 1843 legal proceedings of the Mexican government (or *diseño*) that gave Guillermo Gulnac and Charles Weber the grant of *el Rancho del Campo de Los Franceses*. *Diseño* in English translates to "design," or "map document" and is the word used to describe the documents given by Spanish and Mexican governments to those receiving land grants. The *Rancho del Campo de Los Franceses* is "the ranch of the

camp of the French," and refers to the original land-grant received by William Gulnac and Charles Weber for the land of modern day French Camp area and its surroundings.

Furthermore, SJCHSM staff completed their effort to process and preserve hundreds of records from the San Joaquin County Sheriff's Collection. The SJCHSM also participated in the County Digitization Initiative, in partnership with the Assessor-Recorder-County Clerk's Office, digitizing and preserving the records of the County Supervisors. During 2021-2022, the SJCHSM responded to 1,103 research requests from 197 individuals, agencies, and businesses from around the world, including the US Army Corps of Engineers and the National Museum of Sweden. The SJCHSM anticipates an increase in these types of requests at the end of 2022-2023.

In 2022-2023, staff rescued and processed six pallets of San Joaquin County records abandoned by the City of Stockton, took in 26 farm laborer trunks from the 1930s and 1940s from Little Manila Rising, and acquired the papers of former County Supervisor Richard Yoshikawa.

In 2023-2024, the SJCHSM intends to build on the progress made in 2022-2023. SJCHSM staff and volunteers intend to continue strategic planning for redevelopment of the SJCHSM campus, and hope to continue to invest in the core functions as a collections, archives, and education provider for San Joaquin County.

### Base Funding Level

The County is under contractual obligation to provide base (ongoing) funding to cover an appropriate share of SJCHSM operating costs.

The following table shows the base funding contributions made by the County:

Year	Base Funding	% of Inc./Dec. from Prior Year
2013-2014	\$303,000	0.0%
2014-2015	\$303,000	0.0%
2015-2016	\$303,000	0.0%
2016-2017	\$349,965	15.5%
2017-2018	\$349,965	0.0%
2018-2019	\$384,300	9.8%
2019-2020	\$384,300	0.0%
2020-2021	\$384,300	0.0%
2021-2022	\$520,762	35.5%
2022-2023	\$583,253	12.0%
2023-2024	\$653,253	12.0%



ADOPTED BUDGET

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*Contingencies*

Contingencies

Appropriations

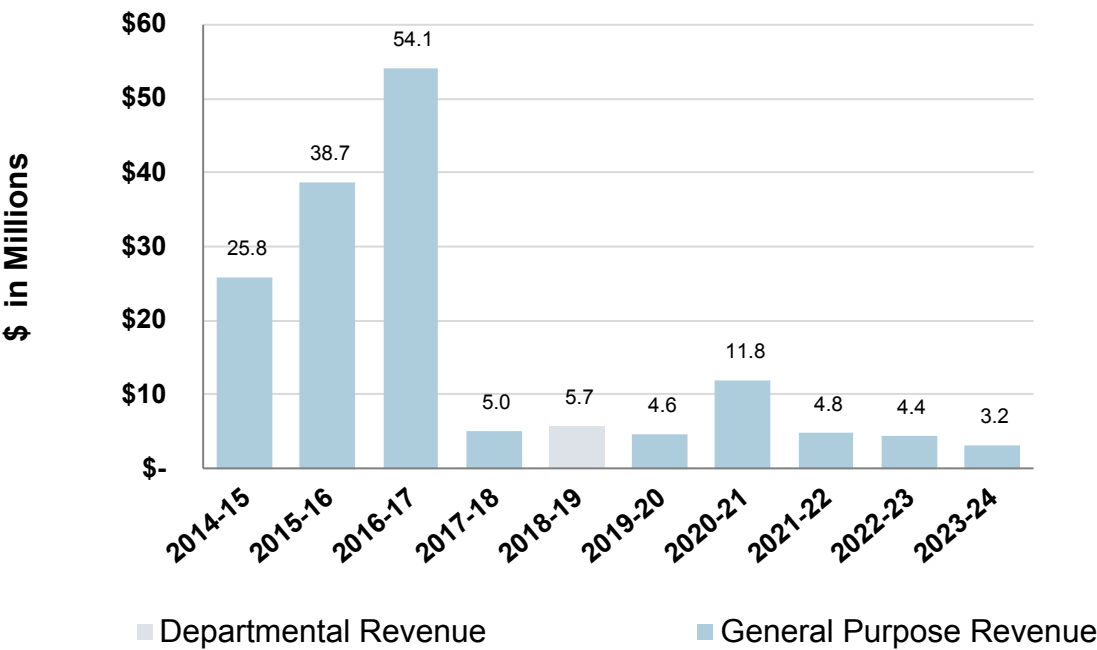
	Page Number	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
1019000000      Contingency Provision	J-3	\$4,366,618	\$3,216,712	\$3,216,712	(\$1,149,906)
<i>Total - Contingencies</i>		<b>\$4,366,618</b>	<b>\$3,216,712</b>	<b>\$3,216,712</b>	<b>(\$1,149,906)</b>

Contingencies

Appropriations

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Appropriations by Source



# 1019000000—Contingency Provision

## Contingencies

Jerome C. Wilverding, County Administrator

General Fund	2021-2022 Actual	2022-2023 Adjusted	2023-2024 Requested	2023-2024 Adopted	Increase/ (Decrease)
<b>Expenditures</b>					
Operating Transfers Out	\$45,000	\$385,000	\$0	\$0	(\$385,000)
Provision for Contingencies	4,722,498	3,981,618	3,216,712	3,216,712	(764,906)
Total Appropriations	\$4,767,498	\$4,366,618	\$3,216,712	\$3,216,712	(\$1,149,906)
<b>Earned Revenues By Source</b>	\$0	\$0	\$0	\$0	\$0
Net County Cost	\$4,767,498	\$4,366,618	\$3,216,712	\$3,216,712	(\$1,149,906)

## Purpose

Government Code Section 29084 permits county budgets to contain an appropriation for contingencies in such an amount that the Board of Supervisors deems appropriate. In San Joaquin County, the Board established the Contingency Provision budget, which provides funds for unanticipated expenditures or revenue shortfalls occurring in all County operations during the fiscal year. The level of the appropriation is set annually as part of the County budget development process. Various factors are evaluated in determining the appropriation level. These include demands on County services, economic outlook, pending Federal and State legislative/budgetary impacts on County programs, the County's short and long-term infrastructure needs, and the availability of funds.

## Major Budget Changes

### Operating Transfers Out

- (\$385,000) Decrease due to one-time transfer out of contingency funds in 2022-2023.

### Provision for Contingencies

- (\$764,906) Decrease due to transfer of funding, directed by the Board of Supervisors during the Final Budget Hearing.

## Program Discussion

The 2023-2024 recommended budget for Contingency Provision totals \$3,216,712, which is a decrease of \$1,149,906 from the 2022-2023 adjusted budget. The Proposed Budget, presented on June 6, 2023, included \$5.0 million. However, the budget was decreased by \$1,783,288 as directed by the Board of Supervisors, during the June 20, 2023 Final Budget Hearing, to transfer funding to the Assessor and Cultural Services budgets. Should the remaining appropriation not be sufficient due to a significant or extraordinary event, a recommendation will be brought to the Board to increase the amount during the fiscal year.

## Use Guidelines & Policies

On October 5, 2010, the Board adopted the Use Guidelines and Policies for the Reserve for Contingencies (R-10-525) in an effort to stabilize the long-term financial viability of the County and to correct the structural imbalance of the budget over a 10-year period. The Use Guidelines and Policies are summarized below:

1. Set the Reserve at 5% of the County budget by 2020-2021.
2. Starting 2011-2012, establish a goal to provide an annual appropriation to the Reserve at a minimum of 1% of the County budget and provide an annual appropriation increase sufficient to reach the 2020- 2021 goal of 5%.
3. Define the Reserve as a one-time resource and not be used to support ongoing operating expenses on an ongoing basis.
4. Use the Reserve to balance the County budget only if other options are unavailable or highly impractical.
5. Cap the annual drawdown of the Reserve at 20% of the amount appropriated in the adopted budget.



# 1019000000—Contingency Provision

## Contingencies

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### 2023-2024 Reserve Level

The 2023-2024 budget recommends to replenish and establish the Reserve at \$129,565,129 or 5.0% of the recommended County budget. The recommended Reserve level represents an increase of \$21,106,835 from the 2022-2023 adopted level. The balance in the Reserve as of March 31, 2023 was \$111,873,231, thus a transfer of \$17,691,898 from the General Fund is recommended.

During 2019-2020, the County Administrator’s Office reviewed the Contingency Reserve level and policies of 23 other counties in the State to determine if 5.0% was an appropriate reserve level for a county and budget of our size. The results showed the County’s Contingency Reserve level is consistent with other counties in the State.

The following chart shows the Contingency Reserve levels for 2014-2015 through 2023-2024:

Fiscal Year	Adopted Budget	Reserve for Contingencies	% of Budget
2014-2015	\$1,326,130,172	\$25,839,892	1.95%
2015-2016	\$1,375,647,801	\$38,724,546	2.89%
2016-2017	\$1,439,598,787	\$54,062,431	3.76%
2017-2018	\$1,616,211,310	\$74,630,220	4.62%
2018-2019	\$1,747,206,329	\$87,378,644	5.00%
2019-2020	\$1,803,049,348	\$90,152,470	5.00%
2020-2021	\$1,910,352,049	\$95,517,602	5.00%
2021-2022	\$2,137,967,942	\$106,898,397	5.00%
2022-2023	\$2,169,165,884	\$108,458,294	5.00%
2023-2024	\$2,591,302,580	\$129,565,129	5.00%



ADOPTED BUDGET

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*Special Districts*

# Special Districts Budgets

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## Purpose

Special Districts are a form of government created by a local community to meet a specific need. The budget requests below are for Special Districts administered by the Public Works Department and the Parks and Recreation Division of the General Services Department. These Districts provide one or a combination of the following services to properties within the respective District boundaries: water, sewer, storm drainage, streetlights, nitrate treatment, household hazardous waste disposal, landscape, and lighting maintenance. Each District budget is developed to address projected District operations and maintenance needs, as well as to provide funding for reserves for future system replacement and capital improvement projects. Revenues are provided through assessments and service charges from benefitting properties within each District's boundaries.

## Lighting Districts

Each district provides funds for specific improvements and/or services that include the maintenance and operation of street lighting and associated structures located within the public rights-of-way and dedicated easements. There are a total of 30 Lighting Districts. The total 2023-2024 Lighting District budget is \$1,438,544, of which \$597,460 is funded by revenue and \$841,084 in fund balance. The appropriations request is an increase of \$18,030 from the 2022-2023 Adopted Budget.

## Maintenance Districts

Each District funds expenses for operation and maintenance costs, which include labor, electricity, regulatory compliance, repairs, pump taxes (for some Water Districts), and capital improvement projects. The total 2023-2024 Maintenance District budget is \$28,053,236, of which \$20,327,744 is funded by revenue and \$7,725,492 by utilizing existing fund balance. The appropriations request is an increase of \$7,492,415 from the 2022-2023 Adopted Budget. The increase is primarily due to inflationary adjustments and increased capital projects expense.

Almond Park, Elkhorn Estates, Gayla Manor, Walnut Acres, and Wilkinson Manor Zone A are anticipated to have a negative cash balance on June 30, 2023. Property owners approved rate increases in 2018 in Gayla Manor and in 2019 in Elkhorn Estates, Walnut Acres, and Wilkinson Manor Zone A and the fund balances for each of these districts are improving. The previously-approved rate increases are phased in over five years.

## Flood Control and Water

The San Joaquin County Flood Control and Water Conservation District (FC and WCD) was created through State legislation for the purpose of planning, constructing, operating and maintaining flood control, and water supply projects. The Board of Supervisors is the governing body of the FC and WCD and has authority to establish assessments and fees in accordance with State law to help fund district activities. There are a total of seven budgets:

1. FC and WCD
2. FC Zone No. 9
3. FC Zone No. 10

4. FC Assessment District 96-1
5. Water Investigation Zone No.2
6. FC Construction Fund
7. Mokelumne River Water and Power Authority

Revenues from these budgets support flood management, water resources project planning activities, and levee and channel maintenance.

The 2023-2024 recommended budget for the Flood Control and Water budgets totals \$22,440,147 and is funded by \$18,598,455 in revenue and \$3,841,692 in fund balance. The appropriations request is a decrease of \$1,605,614 from the 2022-2023 Adopted Budget.

An overall increase of \$413,463 is reflected in the budget for Flood Control Zone 9, which is primarily due to \$800,000 in operating transfers to the Flood Construction budget for funding the local cost share portion of the Department of Water Resources (DWR) grant-funded Deferred Maintenance Program's (DMP) repairs to levee pipe penetrations; completion of the Mormon Slough erosion repairs (\$300,000), and offsetting decreases in allocated service department costs (\$144,000) and in motor pool costs (\$200,000).

The FC and WCD budget reflects a decrease of \$1,879,406 from the prior year due primarily to completion of the Small Communities Feasibility Studies and Delta 2 projects (which were DWR grant funded).Funding in the 2023-2024 budget includes \$44,000 for advanced flood warning equipment.

In 1989, the Board of Supervisors established Water Investigation Zone No. 2 (Zone 2) for water resource planning activities. The Zone 2 funding mechanism is a Countywide property-related fee that is used to carry out the goals set forth in the 2015 Strategic Plan to Meet Water Needs, which includes preserving water rights, managing groundwater, maintaining water supplies, and developing funding programs to meet water needs. The total 2023-2024 Zone 2 budget is \$1,622,282, which is a decrease of \$744,812 from the 2022-2023 Adopted Budget. The decrease is due to reduction in costs for implementing the Groundwater Sustainability Plans in the Eastern and Tracy subbasins and for activities necessary for completing the planning phase of Integrated Regional Water Management projects within the Disadvantaged Community Involvement Program.

## ***Special Districts Budgets***

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### ***San Joaquin Area Flood Control Agency***

The City of Stockton, San Joaquin County, and the FC and WCD created the San Joaquin Area Flood Control Agency (SJAFCOA) in 1995 to develop and implement a project to reduce flooding in the Stockton Metropolitan area. Under an agreement with SJAFCOA, the FC and WCD maintain the levee improvements that were constructed in 1998 by using funding allocated from the SJAFCOA Assessment District 96-1 benefit assessment. The allocation from the SJAFCOA Assessment District 96-1 budget for 2023-2024 reflects appropriations of \$985,000, which represents no change from 2022-2023. This funding is approved each year by the SJAFCOA Board of Directors at their annual budget hearing.

### ***Mokelumne River Water and Power Authority***

The Mokelumne River Water and Power Authority (MRWPA) is a joint powers authority consisting of the FC and WCD and San Joaquin County. The 2023-2024 MRWPA budget reflects appropriations of \$3,750,200 which is an increase of \$3.3 million from 2022-2023. Efforts related to the County's water right application for the Mokelumne River will continue, as well as developing projects in conjunction with local stakeholders to develop the water for beneficial use and/or address critical overdraft. The \$3.3 million increase is from DWR Sustainable Groundwater Management Act (SGMA) Implementation Round 1 grant proceeds to fund project activities focused on groundwater recharge, water conservation and beneficial use of Mokelumne River water rights.

### **County Service Areas (CSAs)**

A CSA may be established to provide a variety of extended services within a particular area that are not available in all parts of the County. At the time a CSA is established, the Board of Supervisors specifies the types of services proposed

to be provided within the area. CSAs in the County typically provide utilities and/or other services and are broken down between two types: Public Works and Parks.

#### ***CSAs – Public Works***

Each CSA funds expenses for maintenance costs, which include labor, electricity, regulatory compliance, repairs, pump taxes (for some Water Districts), and capital improvement projects. The total recommended 2023-2024 CSA budget is \$8,843,719, of which \$4,863,702 is funded by revenue and \$3,980,017 in fund balance. The requested appropriations request is a decrease of \$1,368,820 from the 2022-2023 Adopted Budget. This is primarily due to grant funding for capital projects expense. CSA 53 will receive a Household Hazardous Waste (HHW) grant totaling \$100,000 from Cal-Recycle in 2023-2024. Due to rising disposal costs, facility maintenance and improvements, a rate increase as early as 2023-2024 is needed to maintain and operate the HHW program efficiently.

CSAs 43 Clements, 44 Fair Oaks –Apricot Acres, 44 Zone E, 44 Zone G, 49 Zone L Rural, and 51 Acampo Village are anticipated to have a negative cash balance on June 30, 2023. Property owners in 43 approved rate increases in 2018 and the fund balance is still recovering. Rate increases for CSAs 44 Zone E and 44 Zone G were approved by the Board of Supervisors in 2020. Recovery of these fund balances is expected to take at least ten years.

#### ***CSAs – Parks***

The total recommended budget for Parks in 2023-2024 is \$326,275. This budget is funded by \$275,493 in revenue and \$50,782 in fund balance. The projected fund balance on June 30, 2023 is \$179,341. The appropriations request is an increase of \$42,105 from the 2022-2023 adjusted budget, due to an increase in projected maintenance and grounds costs.

## Special Districts Budgets

	Projected Fund Balance as of July 1, 2023	2023-2024 Appropriations	2023-2024 Revenues	Projected Fund Balance as of June 30, 2024
<b>Lighting Districts</b>				
Ash Street	\$271,905	\$157,095	\$35,574	\$150,384
Boggs Tract	68,419	34,596	9,186	43,009
Burkett Gardens	80,260	56,718	60,677	84,219
Burkett Garden Acres	50,275	43,110	24,275	31,440
Eastview	47,684	26,096	13,034	34,622
Elkhorn	12,703	10,653	5,548	7,598
Farmington	9,514	6,013	3,388	6,889
Linden	116,989	98,231	29,105	47,863
Lockeford	101,262	66,542	22,313	57,033
Mariposa Heights	28,885	17,285	2,745	14,345
Mission Village	20,886	9,467	3,541	14,960
Morada Estates	20,582	13,935	5,794	12,441
Morada Manor	13,180	6,462	2,371	9,089
North Oaks	30,575	16,016	6,908	21,467
North Wilson Way	106,705	61,526	20,802	65,981
Northeast Stockton	106,540	96,241	56,582	66,881
Oro Street	174,802	133,166	47,359	88,995
Plymouth Village	85,266	72,186	29,064	42,144
Rancho Village	(140)	877	1,109	92
Shasta Avenue	14,715	10,950	8,839	12,604
Shippee-French Camp	15,865	4,750	3,667	14,782
Silva Gardens	6,039	3,614	3,127	5,552
South French Camp	28,707	7,084	5,661	27,284
Southwest Stockton	152,856	70,911	21,733	103,678
Stockton No. 5	14,345	4,786	2,675	12,234
Tuxedo-Country Club	72,462	39,052	26,061	59,471
Victor	12,929	5,967	6,075	13,037
West Lane	40,341	15,672	5,818	30,487
West Stockton	158,044	132,420	67,805	93,429
Woodbridge	334,470	217,123	66,624	183,971
<b>Lighting Districts Total</b>	<b>\$2,197,065</b>	<b>\$1,438,544</b>	<b>\$597,460</b>	<b>\$1,355,981</b>
<b>Maintenance Districts</b>				
Acampo	\$423,309	\$224,928	\$47,215	\$245,596
Almond Park	(23,724)	136,068	26,815	(132,977)
Ashley Park	14,041	3,623	1,495	11,913
Bear Creek Terrace	21,643	37,211	24,464	8,896
Bowling Green Estates	7,462	9,852	5,532	3,142
Colonial Heights	2,022,463	5,162,439	5,349,919	2,209,943

## Special Districts Budgets

	Projected Fund Balance as of July 1, 2023	2023-2024 Appropriations	2023-2024 Revenues	Projected Fund Balance as of June 30, 2024
Corral Hollow	20,624	167,505	115,094	(31,787)
Country Club Vista	462,506	324,997	21,087	158,596
Elkhorn Estates	(189,316)	490,841	373,061	(307,096)
Gayla Manor	(216,358)	188,070	89,767	(314,661)
Lambert Village	139,015	38,947	15,203	115,271
Lincoln Village	5,542,624	8,572,726	7,608,019	4,577,917
Lockeford Maintenance	2,971	8,876	3,730	(2,175)
Maurland Manor	63,097	62,951	34,002	34,148
Mokelumne Acres	1,380,998	455,825	318,603	1,243,776
Morada Acres	7,895	1,014,810	950,772	(56,143)
Morada Estates	367,163	242,829	129,329	253,663
Morada Manor	20,707	131,459	70,021	(40,731)
Pacific Gardens	3,093,789	4,224,489	2,816,870	1,686,170
Rancho San Joaquin	102,073	444,038	322,499	(19,466)
Raymus Village	5,251,876	4,003,297	599,311	1,847,890
Riviera Cliffs	43,155	21,723	10,030	31,462
Shaded Terrace	110,688	377,168	299,622	33,142
Shaded Terrace - Debt Service	10,754	20,815	18,370	8,309
Spring Creek Estates	109,893	350,663	285,645	44,875
Summer Home Estates	4,819	9,933	2,102	(3,012)
Sunnyside Estates	41,577	223,577	100,107	(81,893)
Walnut Acres	(56,198)	154,556	88,731	(122,023)
Wilkinson Manor	351,411	443,875	355,208	262,744
Wilkinson Manor Zone A	(64,012)	223,475	91,966	(195,521)
San Joaquin Water Works No. 21	506,763	281,670	153,155	378,248
<b>Maintenance Districts Total</b>	<b>\$19,573,708</b>	<b>\$28,053,236</b>	<b>\$20,327,744</b>	<b>\$11,848,216</b>

### Flood Control and Waters - Districts & Zones

San Joaquin County Flood Control & Water Conservation District (21101)	\$3,573,012	\$2,609,958	\$1,761,305	\$2,724,359
Flood Control Zone No. 9 (21113)	5,419,439	7,123,350	4,728,550	3,024,639
Flood Control Zone No. 10 (21114)	323,557	349,357	25,800	0
Flood Control Assessment District No. 96-1 (21116)	0	985,000	985,000	0
Water Investigation Zone No. 2 (21168)	897,816	1,622,282	1,444,800	720,334
Flood Control – Construction (21192)	0	6,000,000	6,000,000	0
Mokelumne River Water & Power Authority (21201)	271,214	3,750,200	3,653,000	174,014
<b>Flood Control and Water Total</b>	<b>\$10,485,038</b>	<b>\$22,440,147</b>	<b>\$18,598,455</b>	<b>\$6,643,346</b>

## Special Districts Budgets

		Projected Fund Balance as of July 1, 2023	2023-2024 Appropriations	2023-2024 Revenues	Projected Fund Balance as of June 30, 2024
<b>County Service Areas - Public Works</b>					
#3	Zone A Tallahatchey Terrace	\$14,790	\$26,915	\$12,445	\$320
#12	Thorton	48,985	356,526	258,720	(48,821)
#12	Thorton - Debt Service	0	0	0	0
#14	Victor	26,657	20,073	295	6,879
#15	Waterloo/99	654,129	432,685	328,538	549,982
#16	Par Country Estates	248,338	284,157	176,181	140,362
#17	Cherokee Industrial Park	170,536	153,219	21,566	38,883
#18	Fairway Estates	61,972	124,810	42,264	(20,574)
#21	Oak Creek	80,426	31,562	10,413	59,277
#23	Granda Glen	10,697	20,728	12,918	2,887
#24	Moznett Estates	300,852	21,520	9,960	289,292
#25	Capewood	20,220	12,304	740	8,656
#29	Forest Lake Ranchettes	127,826	25,183	6,302	108,945
#30	Manteca Industrial Park	226,866	156,332	70,169	140,703
#31	Flag City	732,607	317,869	194,402	609,140
#31	Zone W Flag City-Nitrate Treatment	466,427	156,184	61,992	372,235
#35	Santos Ranch/Los Ranchos	249,512	262,490	117,535	104,557
#35	Santos Ranch/Los Ranchos - Water	359,656	130,000	1,500	231,156
#36	Lloyd Lane	24,497	14,340	1,729	11,886
#36	Zone A Lloyd Lane	8,449	9,272	1,036	213
#36	Zone B Lloyd Lane	29,627	9,131	2,240	22,736
#37	Marty Court	2,455	9,096	1,235	(5,406)
#41	Eaglecrest	50,903	30,863	6,480	26,520
#41	Zone C Solari Ranch	345,842	50,776	17,492	312,558
#41	Zone N Tierra Del Sol	13,372	15,495	11,669	9,546
#42	Blatt Estates	39,715	16,952	4,325	27,088
#43	Clements	(48,318)	174,171	94,068	(128,421)
#43	Zone D Clements	41,783	16,678	4,990	30,095
#44	Fair Oaks - Apricot Acres	(99,074)	477,438	329,540	(246,972)
#44	Zone E Castello Estates	(810,233)	584,837	323,394	(1,071,676)
#44	Zone G Linne Estates	(626,343)	761,572	452,175	(935,740)
#45	Lockeford Bluffs	37,304	26,949	5,925	16,280
#46	Morada North	45,430	501,253	320,575	(135,248)
#46	Zone L Heather Moore Estates	3,522	3,698	1,128	952
#47	Hempstead Court	24,664	19,954	1,390	6,100
#48	Zone K Woodbridge Main Street	56,014	62,772	12,850	6,092
#49	Zone L Rural Intersection Lighting	(1,220)	10,515	4,461	(7,274)
#49	Zone L-1 Rural Intersection Lighting	51,852	28,337	7,659	31,174
#50	Patterson Pass Business Park	262,686	85,336	24,416	201,766

## Special Districts Budgets

	Projected Fund Balance as of July 1, 2023	2023-2024 Appropriations	2023-2024 Revenues	Projected Fund Balance as of June 30, 2024
#51 Acampo Village	(1,413)	7,687	1,506	(7,594)
#52 Blossom Court	57,677	15,528	4,879	47,028
#53 Household Hazardous Waste	645,678	1,567,978	1,063,372	141,072
#54 NPDES	1,810,143	1,774,000	830,000	866,143
#55 Shaylynn Estates	6,286	7,122	1,575	739
#55 Zone C Stonegate Estates	112,258	17,024	4,950	100,184
#56 Peters	58,710	12,388	2,703	49,025
<b>County Service Areas –Public Works Total</b>	<b>\$5,942,762</b>	<b>\$8,843,719</b>	<b>\$4,863,702</b>	<b>\$1,962,745</b>
<b>County Service Areas - Parks</b>				
#1 Boggs Tract Park	\$9,003	\$27,580	\$21,138	\$2,561
#2 Madison Park	53,048	57,515	48,136	43,669
#3 Garden Acres - Eastside Park	16,605	82,828	77,606	11,383
#4 Lathrop Park	4,895	28,191	28,191	4,895
#5 Raymus Village Park	41,055	40,110	29,856	30,801
#8 Taft Park	78,008	50,498	50,498	78,008
#11 Larch Clover Park	0	7,368	7,368	0
#48 Woodbridge Community Park	27,509	32,185	12,700	8,024
<b>County Service Areas - Parks Total</b>	<b>\$230,123</b>	<b>\$326,275</b>	<b>\$275,493</b>	<b>\$179,341</b>
<b>Districts Governed by the Board of Supervisors Total</b>	<b>\$38,428,696</b>	<b>\$61,101,921</b>	<b>\$44,662,854</b>	<b>\$21,989,629</b>



## Special Districts Budgets

### 2023-2024 Planned Projects List

In 2014-2015, the Board of Supervisors adopted the Uniform Public Construction Cost Account Act (UPCCAA) and Job Order Contracting (JOC) to streamline the bidding process for minor construction projects. During 2023-2024, Public Works will utilize County labor and/or JOC to deliver a number of projects in the Special Districts. The JOC mechanism will be used to rehabilitate or repair several wells and various storm and sewer systems. The Flood Control District will repair several levee pipe penetrations and will procure equipment and materials for flood emergency preparedness.

Planned projects in 2023-2024 are as follows:

Fund	District	Service	Description	Cost
<b>Flood Control and Water</b>				
21101	Flood Control & WCD	FC	ALERT 2 Equipment	\$44,000
21113	FC &WCD Zone 9	FC	Statewide 3 Flood Preparedness Materials	583,950
21192	Flood Control	FC	Deferred Maintenance Phase 2 Levee Pipe Repairs	6,000,000
21201	Mokelumne River Water & Power Authority	W	Mokelumne River Integrated Water Storage & Conjunctive Use Development Project	3,400,000
<b>Flood Control and Water Total</b>				<b>\$10,027,950</b>
<b>Lighting Districts</b>				
22001	ASH STREET	L	Streetlight Acquisition	\$114,000
22002	BOGGS TRACT	L	Streetlight Acquisition	21,000
22003	BURKETT GARDEN ACRES	L	Streetlight Acquisition	15,000
22005	EASTVIEW	L	Streetlight Acquisition	10,000
22008	LINDEN	L	Streetlight Acquisition	63,000
22009	LOCKEFORD	L	Streetlight Acquisition	40,000
22010	MARIPOSA HEIGHTS	L	Streetlight Acquisition	6,000
22014	NORTH OAKS	L	Streetlight Acquisition	5,000
22015	NORTH WILSON WAY	L	Streetlight Acquisition	30,000
22016	NORTHEAST STOCKTON	L	Streetlight Acquisition	25,000
22017	ORO STREET	L	Streetlight Acquisition	90,000
22018	PLYMOUTH VILLAGE	L	Streetlight Acquisition	40,000
22025	SOUTHWEST STOCKTON	L	Streetlight Acquisition	49,000
22027	TUXEDO COUNTRY CLUB	L	Streetlight Acquisition	15,000
22029	WEST LANE	L	Streetlight Acquisition	9,000
22031	WEST STOCKTON	L	Streetlight Acquisition	65,000
22030	WOODBIDGE	L	Streetlight Acquisition	140,000
<b>Lighting Districts Total</b>				<b>\$737,000</b>
<b>Maintenance Districts</b>				
22101	Acampo	W	Well #2 - Pump/Motor	\$30,000
22701	Colonial Heights	W	Water Line Replacement	1,300,000
22701	Colonial Heights	S	Sewer Main CIPP	30,000
22701	Colonial Heights	L	Streetlight Acquisition	74,000
22701	Colonial Heights	D	Generators	120,000
22601	Country Club Vista	SL, D	District System Improvements	300,000

## Special Districts Budgets

Fund	District	Service	Description	Cost
23001	Elkhorn Estates	W	Well #1 - Pump	6,000
23101	Gayla Manor	W	Well - Pump	6,000
23201	Lambert Village	L	Street light acquisition	11,000
23401	Lincoln Village	S	Lift Station Portable Generator	200,000
23401	Lincoln Village	S	Sewer and Storm CIPP	30,000
23401	Lincoln Village	D	Swain Road Pump House Repairs	30,000
23401	Lincoln Village	W	Water Line Replacement	1,400,000
23401	Lincoln Village	L	Streetlight Acquisition	259,000
23401	Lincoln Village	D	Storm Pump Rehabilitation	150,000
23801	Morada Acres	W	Water Line Replacement	900,000
23901	Morada Estates	W	Water Pump	6,000
24201	Pacific Gardens	S	Sewer Main CIPP	30,000
24201	Pacific Gardens	S	Main Replacement	1,000,000
24301	Rancho San Joaquin	W	Generator	200,000
24301	Rancho San Joaquin	D	Storm Pump Rehabilitation	30,000
24301	Rancho San Joaquin	W	Water Pump	12,000
24401	Raymus Village	W	Replace Valves	25,000
24401	Raymus Village	W	TCP Filter	3,295,505
24401	Raymus Village	S	Sewer Main CIPP	30,000
24401	Raymus Village	L	Streetlight Acquisition	25,000
24501	Riviera Cliffs	L	Streetlight Acquisition	10,000
24901	Sunnyside Estates	W	Meter Installation	147,500
21501	SJ Water Works	W	Pump Switchboard	20,000
25101	Wilkinson Manor	W	Pump Switchboard	20,000
25101	Wilkinson Manor	W	Pump Variable Frequency Drive (VFD)	25,000
25131	Wilkinson Manor Zone A	W	Pump Switchboard	8,000
25131	Wilkinson Manor Zone A	W	Water Storage Tank	64,000
<b>Maintenance District Total</b>				<b>\$9,794,005</b>

### County Service Areas

31201	CSA 12	W	Water Pipe Rehabilitation	\$60,000
31201	CSA 12	W	Water Main Looping	1,200,000
31501	CSA 15	L	Street Light Acquisition	16,000
31701	CSA 17	D	Storm Drain Pipe Repair	50,000
31701	CSA 17	L	Street Light Acquisition	24,000
32101	CSA 21	L	Street Light Acquisition	7,000
33001	CSA 30	L	Street Light Acquisition	11,000
33101	CSA 31	L	Street Light Acquisition	7,000
34101	CSA 41	L	Street Light Acquisition	8,000
34441	CSA 44 Zone G	S	Bar Screen Replacement	30,000
34501	CSA 45	D	Storm Pump Rehabilitation	15,000

## Special Districts Budgets

Fund	District	Service	Description	Cost
34931	CSA 49, Zone L-1	L	Street Light Acquisition	12,000
35001	CSA 50	L	Street Light Acquisition	38,000
35301	CSA 53	HHW	Roof	25,000
35301	CSA 53	HHW	Parking Lot Striping/Maintenance	20,000
35301	CSA 53	HHW	Asphalt Resurfacing	60,000
35301	CSA 53	HHW	Replace Rolling Steel Door	15,000
35301	CSA 53	HHW	Replace Shower Insert	15,000
35301	CSA 53	HHW	Replace Exhaust Fans	25,000
35301	CSA 53	HHW	Heaters	50,000
35301	CSA 53	HHW	Break Area Construction (Table Included)	5,000
35301	CSA 53	HHW	County Phone System Installation	10,000
<b>County Service Areas Total</b>				<b>\$1,703,000</b>
<b>Special Districts Planned Projects &amp; Capital Expenses Total</b>				<b>\$22,261,955</b>

### Service Abbreviations:

L - Streetlights  
 W - Water  
 S - Sewer  
 D - Storm Drainage  
 FC - Flood Control  
 WCD - Water Conservation District  
 CIPP - Cast-in-Place Pipe  
 HHW - Household Hazardous Waste  
 JOC - Job Order Construction  
 UPPCCA - Uniform Public Construction Cost Accounting Act



ADOPTED BUDGET

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*Position Detail*

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 1010100000 BOARD OF SUPERVISORS</b>					
OB1290:	Board of Supervisors	4	4	4	O:Exempt Unrepresented
OB1291:	Chairman Board of Supervisors	1	1	1	O:Exempt Unrepresented
EB1220:	Clerk of the Board	1	1	1	B:Senior Management Unrepresented
EB4295:	Board of Supervisor's Chief of Staff	5	5	5	D:Confidential Unrepresented
EB1221:	Chief Deputy Clerk of the Board	1	1	1	D:Confidential Unrepresented
EB4201:	Deputy Clerk of the Board II	2	2	2	D:Confidential Unrepresented
RO2001:	Office Secretary	1	1	1	D:Confidential Unrepresented
EB0250:	Public Information Specialist-Exempt	1	1	1	D:Confidential Unrepresented
EO6112:	Senior Office Assistant-Exempt	2	2	2	D:Confidential Unrepresented
	<b>Allocated Total</b>	<b>18.0</b>	<b>18.0</b>	<b>18.0</b>	
	<b>Position Total</b>	<b>18.0</b>	<b>18.0</b>	<b>18.0</b>	
<b>Budget Unit 1010200000 COUNTY ADMINISTRATOR</b>					
HB1100:	Administrator-County	1	1	1	A:Executive Unrepresented
HB1120:	Assistant County Administrator	2	2	2	A:Executive Unrepresented
EB2200:	Chief Deputy County Administrator	1	1	1	B:Senior Management Unrepresented
- EM0261:	Senior Deputy County Administrator	7	7	7	B:Senior Management Unrepresented
- RB6502:	Administrative Assistant II	1	1	1	D:Confidential Unrepresented
RM0228:	Management Analyst III	1	1	1	D:Confidential Unrepresented
- RO2011:	Management Secretary II	2	2	2	D:Confidential Unrepresented
- RO6111:	Senior Office Assistant		1 *	1 *	D:Confidential Unrepresented
	<b>Allocated Total</b>	<b>15.0</b>	<b>16.0 *</b>	<b>16.0 *</b>	
	<b>Position Total</b>	<b>15.0</b>	<b>16.0 *</b>	<b>16.0 *</b>	
<b>Budget Unit 1010800000 AUDITOR-CONTROLLER</b>					
OB1190:	Auditor/Controller	1	1	1	O:Exempt Unrepresented
EB2190:	Assistant Auditor-Controller	1	1	1	B:Senior Management Unrepresented
RM0200:	Chief Deputy Auditor-Controller	3	3	3	C:Middle Management SJCMA
RO3021:	Accounting Technician I	4	4	4	D:Confidential Unrepresented
RO3011:	Accounting Technician I	3	3	3	G:Office & Office Technical SEIU
RO3022:	Accounting Technician II	1	1	1	D:Confidential Unrepresented
RO3012:	Accounting Technician II	2	2	2	G:Office & Office Technical SEIU
- RB6501:	Administrative Assistant I	1	1	1	D:Confidential Unrepresented
- RB6205:	Business Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RM0201:	Chief Deputy Auditor-Controller	1	1	1	D:Confidential Unrepresented
- RB4103:	Deputy Auditor-Controller III	9	9	9	E:Professional SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	7	7	7	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>35.0</b>	<b>35.0</b>	<b>35.0</b>	
	<b>Position Total</b>	<b>35.0</b>	<b>35.0</b>	<b>35.0</b>	
<b>Budget Unit 1011000000 TREASURER-TAX COLLECTOR</b>					
OB1690:	Treasurer-Tax Collector	1	1	1	O:Exempt Unrepresented
EB2690:	Assistant Treasurer-Tax Collector	1	1	1	B:Senior Management Unrepresented
EB2691:	Chief Deputy Treasurer	1	1	1	B:Senior Management Unrepresented
RB2500:	Chief Deputy Treasurer-Tax Collector	1	1	1	C:Middle Management SJCMA
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	6	6	6	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	6	6	6	G:Office & Office Technical SEIU
RI1103:	Department Information Systems Analyst III		1 *	1 *	E:Professional SEIU
RO2060:	Executive Secretary	1	1	1	G:Office & Office Technical SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	6	6	6	G:Office & Office Technical SEIU
RB2010:	Tax Collection Specialist	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>26.0</b>	<b>27.0 *</b>	<b>27.0 *</b>	
	<b>Temporary (FTE)</b>	<b>0.7</b>	<b>0.7</b>	<b>0.7</b>	
	<b>Position Total</b>	<b>26.7</b>	<b>27.7 *</b>	<b>27.7 *</b>	
<b>Budget Unit 1011100000 ASSESSOR</b>					
OB1490:	Assessor/Recorder/County Clerk	1	1	1	O:Exempt Unrepresented
EB2491:	Assistant Assessor/Recorder/County Clerk	1	1	1	B:Senior Management Unrepresented
RM0270:	Business Intelligence Administrator		1 *	1 *	C:Middle Management SJCMA
RI1011:	Department Information Systems Manager	1	1	1	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
RB4306:	Principal Appraiser	3	3	3	C:Middle Management SJCMA
- RB4303:	Appraiser III	22	22	22	F:ParaProfessional & Tech SEIU
RB4304:	Appraiser IV	4	4	4	R:Supervisors Unit SEIU

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RE0213:	Assessors Chief Mapping Technician	1	1	1	R:Supervisors Unit SEIU
- RE0211:	Assessors Mapping Technician II	3	2 *	2 *	F:ParaProfessional & Tech SEIU
RE0212:	Assessors Senior Mapping Technician	1	1	1	F:ParaProfessional & Tech SEIU
RI4201:	Associate Geographic Information Systems Analyst		1 *	1 *	E:Professional SEIU
- RB4203:	Auditor-Appraiser III	8	8	8	F:ParaProfessional & Tech SEIU
RB4204:	Auditor-Appraiser IV	1	1	1	R:Supervisors Unit SEIU
- RI1102:	Department Information Systems Analyst II	2	2	2	E:Professional SEIU
RI1103:	Department Information Systems Analyst III	2	2	2	E:Professional SEIU
RO2060:	Executive Secretary	1	1	1	G:Office & Office Technical SEIU
- RI4102:	Geographic Information Systems Specialist II		1 *	1 *	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	3	3	3	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	2	2	2	R:Supervisors Unit SEIU
RI4203:	Principal Geographic Information System Analyst	1	1	1	E:Professional SEIU
RO4451:	Property Technician	8	8	8	G:Office & Office Technical SEIU
RO4460:	Property Technician Supervisor	2	2	2	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	10	10	10	G:Office & Office Technical SEIU
- RO4423:	Transfer Technician III	6	6	6	G:Office & Office Technical SEIU
RO1200:	Transfer Technician Supervisor	1	1	1	R:Supervisors Unit SEIU
<b>Allocated Total</b>		<b>87.0</b>	<b>89.0 *</b>	<b>89.0 *</b>	
<b>Temporary (FTE)</b>		<b>1.0</b>	<b>1.6 *</b>	<b>1.6 *</b>	
<b>Position Total</b>		<b>88.0</b>	<b>90.6 *</b>	<b>90.6 *</b>	
<b>Budget Unit 1011200000 PURCHASING SUPPORT SVS</b>					
HB1950:	Director of Purchasing & Support Services	1	1	1	A:Executive Unrepresented
EB1960:	Deputy Director Purchasing & Support Services	1	1	1	B:Senior Management Unrepresented
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
- RB0510:	Deputy Purchasing Agent	11	11	11	E:Professional SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RB0701:	Records Management Technician I	1	1	1	F:ParaProfessional & Tech SEIU
RB0710:	Records Supervisor	1	1	1	R:Supervisors Unit SEIU
RO7302:	Senior Support Services Technician	2	2	2	G:Office & Office Technical SEIU
RC2000:	Stock Clerk I	1	1	1	I:Trades, Labor, & Institutional SEIU
- RO7301:	Support Services Technician II	5	5	5	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>26.0</b>	<b>26.0</b>	<b>26.0</b>	
<b>Temporary (FTE)</b>		<b>4.5</b>	<b>4.5</b>	<b>4.5</b>	
<b>Position Total</b>		<b>30.5</b>	<b>30.5</b>	<b>30.5</b>	
<b>Budget Unit 1011600000 REVENUE AND RECOVERY</b>					
RO3011:	Accounting Technician I	2	2	2	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
RO1100:	Collections Supervisor	1	1	1	R:Supervisors Unit SEIU
RO6115:	Office Assistant Specialist	2	2	2	G:Office & Office Technical SEIU
- RO4603:	Senior Collections Clerk	6	5 *	5 *	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>14.0</b>	<b>13.0 *</b>	<b>13.0 *</b>	
<b>Position Total</b>		<b>14.0</b>	<b>13.0 *</b>	<b>13.0 *</b>	
<b>Budget Unit 1011800000 COUNTY COUNSEL</b>					
HL1100:	County Counsel	1	1	1	A:Executive Unrepresented
HL1110:	Assistant County Counsel	1	1	1	A:Executive Unrepresented
EL2100:	Chief Deputy County Counsel	1	1	1	B:Senior Management Unrepresented
- RL2054:	Deputy County Counsel IV	11	11	11	D:Confidential Unrepresented
RO2061:	Executive Secretary	1	1	1	D:Confidential Unrepresented
- RL0402:	Legal Technician II	2	2	2	D:Confidential Unrepresented
- RL0105:	Paralegal II	1	1	1	D:Confidential Unrepresented
- RO6111:	Senior Office Assistant	2	2	2	D:Confidential Unrepresented
<b>Allocated Total</b>		<b>20.0</b>	<b>20.0</b>	<b>20.0</b>	
<b>Temporary (FTE)</b>		<b>0.5</b>	<b>*</b>	<b>*</b>	
<b>Position Total</b>		<b>20.5</b>	<b>20.0 *</b>	<b>20.0 *</b>	
<b>Budget Unit 1012400000 HUMAN RESOURCES</b>					
HB1600:	Director of Human Resources	1	1	1	A:Executive Unrepresented
EB2600:	Assistant Director Human Resources	1	1	1	B:Senior Management Unrepresented
RM0252:	County Safety & Risk Manager	1	1	1	D:Confidential Unrepresented
RB5304:	Disability Management Coordinator	1	1	1	D:Confidential Unrepresented
RM0251:	EEO Program Manager	1	1	1	D:Confidential Unrepresented

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
	RM0250:Employee Benefits Manager	1	1	1	D:Confidential Unrepresented
-	RB5402:Employee Relations Analyst III	1	2 *	2 *	D:Confidential Unrepresented
	RO2061:Executive Secretary	1	1	1	D:Confidential Unrepresented
	RM0228:Management Analyst III	1	1	1	D:Confidential Unrepresented
	RO6116:Office Assistant Specialist	5	5	5	D:Confidential Unrepresented
	RO6701:Office Technician/Coordinator	1	1	1	D:Confidential Unrepresented
-	RB5103:Personnel Analyst III	20	23 *	23 *	D:Confidential Unrepresented
	RB5005:Position Control Coordinator	1	1	1	D:Confidential Unrepresented
	RB5001:Position Control Technician	3	3	3	D:Confidential Unrepresented
	RB5403:Principal Employee Relations Analyst	1	1	1	D:Confidential Unrepresented
	RB5110:Principal Personnel Analyst	3	3	3	D:Confidential Unrepresented
	RB5310:Safety Officer	1	1	1	D:Confidential Unrepresented
-	RO6111:Senior Office Assistant	8	7 *	7 *	D:Confidential Unrepresented
	RB5200:Staff Development Coordinator	1	1	1	D:Confidential Unrepresented
	<b>Allocated Total</b>	<b>53.0</b>	<b>56.0 *</b>	<b>56.0 *</b>	
	<b>Position Total</b>	<b>53.0</b>	<b>56.0 *</b>	<b>56.0 *</b>	
<b>Budget Unit 1013000000 REGISTRAR OF VOTERS</b>					
	HB1550:Registrar of Voters	1	1	1	A:Executive Unrepresented
	EB2500:Assistant Registrar of Voters	1	1	1	B:Senior Management Unrepresented
	RO4725:Elections Manager		1 *	1 *	C:Middle Management SJCA
-	RB6001:Administrative Assistant I		1 *	1 *	F:ParaProfessional & Tech SEIU
-	RB6205:Business Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
	RO4715:Elections Specialist	4	4	4	G:Office & Office Technical SEIU
	RO4711:Elections Technician	8	12 *	12 *	G:Office & Office Technical SEIU
	RO4720:Elections Technician Supervisor	4	4	4	R:Supervisors Unit SEIU
-	RI4102:Geographic Information Systems Specialist II		1 *	1 *	F:ParaProfessional & Tech SEIU
-	RB6512:Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
	RO6700:Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
	RC2011:Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
	RC2012:Storekeeper II	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>23.0</b>	<b>30.0 *</b>	<b>30.0 *</b>	
	<b>Temporary (FTE)</b>	<b>16.4</b>	<b>12.1 *</b>	<b>12.1 *</b>	
	<b>Position Total</b>	<b>39.4</b>	<b>42.1 *</b>	<b>42.1 *</b>	
<b>Budget Unit 1014000000 GENERAL SERVICES - ADMIN</b>					
	HC1200:Director of General Services	1	1	1	A:Executive Unrepresented
	EC1205:Assistant Director General Services	1	1	1	B:Senior Management Unrepresented
-	RB6001:Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
	<b>Position Total</b>	<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
<b>Budget Unit 1014200000 FACILITIES MANAGEMENT</b>					
	RM0345:District Maintenance & Construction Superintendent	3	3	3	C:Middle Management SJCA
	RE1420:Energy Manager	1	1	1	C:Middle Management SJCA
	RO3012:Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
-	RC0402:Crafts Worker II	2	2	2	I:Trades, Labor, & Institutional SEIU
	RC0403:Crafts Worker III	22	23 *	23 *	I:Trades, Labor, & Institutional SEIU
	RC0404:Crafts Worker IV	5	5	5	R:Supervisors Unit SEIU
	RC0410:Electrician	4	4	4	I:Trades, Labor, & Institutional SEIU
-	RB6512:Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
	RC4001:Office Building Engineer	7	7	7	I:Trades, Labor, & Institutional SEIU
	RO1000:Office Supervisor		1 *	1 *	R:Supervisors Unit SEIU
	RE5005:Property Manager	1	1	1	E:Professional SEIU
-	RO6110:Senior Office Assistant	3	3	3	G:Office & Office Technical SEIU
	RC2011:Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
	<b>Allocated Total</b>	<b>51.0</b>	<b>53.0 *</b>	<b>53.0 *</b>	
	<b>Temporary (FTE)</b>	<b>2.1</b>	<b>2.5 *</b>	<b>2.5 *</b>	
	<b>Position Total</b>	<b>53.1</b>	<b>55.5 *</b>	<b>55.5 *</b>	
<b>Budget Unit 1014300000 CAPITAL PROJECT ADMIN</b>					
	EC2201:Facilities & Construction Planner	1	1	1	B:Senior Management Unrepresented
	RM0226:Management Analyst III	1	1	1	C:Middle Management SJCA
	RO3011:Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
-	RE0112:Engineering Assistant II	3	3	3	F:ParaProfessional & Tech SEIU

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RE0113:	Engineering Assistant III	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	
	<b>Position Total</b>	<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	
<b>Budget Unit 1016000000 SURVEYOR</b>					
RE3002:	Assistant County Surveyor	1	1	1	C:Middle Management SJCMA
- RE0112:	Engineering Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>2.0</b>	<b>2.0</b>	<b>2.0</b>	
	<b>Temporary (FTE)</b>	<b>0.8</b>	<b>0.8</b>	<b>0.8</b>	
	<b>Position Total</b>	<b>2.8</b>	<b>2.8</b>	<b>2.8</b>	
<b>Budget Unit 2020200000 DISTRICT ATTORNEY</b>					
OL1390:	District Attorney	1	1	1	O:Exempt Unrepresented
EL2390:	Assistant District Attorney	1	1	1	B:Senior Management Unrepresented
EL2391:	Chief Deputy District Attorney	4	5 *	5 *	B:Senior Management Unrepresented
EL2392:	Chief District Attorney Investigator	1	1	1	B:Senior Management Unrepresented
RL3023:	District Attorney Investigator III	3	3	3	J:Sheriffs Management SJC LEMA
RI1011:	Department Information Systems Manager		1 *	1 *	C:Middle Management SJCMA
RS6050:	Family Justice Program Manager	1	1	1	C:Middle Management SJCMA
RM0224:	Management Services Administrator	1	1	1	C:Middle Management SJCMA
RO3011:	Accounting Technician I	3	4 *	4 *	G:Office & Office Technical SEIU
- RB6001:	Administrative Assistant I		1 *	1 *	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RP4001:	Crime Analyst		1 *	1 *	F:ParaProfessional & Tech SEIU
- RI1102:	Department Information Systems Analyst II	1	1	1	E:Professional SEIU
RI1103:	Department Information Systems Analyst III		1 *	1 *	E:Professional SEIU
RI1104:	Department Information Systems Analyst IV	1	1	1	E:Professional SEIU
- RI1302:	Department Information Systems Specialist II	1	1	1	F:ParaProfessional & Tech SEIU
RI1303:	Department Information Systems Specialist III		1 *	1 *	F:ParaProfessional & Tech SEIU
RO6120:	Department Payroll Specialist	1	1	1	G:Office & Office Technical SEIU
- RL2014:	Deputy District Attorney IV	89	89	89	T:Attorney Bargaining Unit
- RL3012:	District Attorney Investigative Assistant II	11	12 *	12 *	H:Safety, Investigative, & Custodial SEIU
- RL3022:	District Attorney Investigator II	29	30 *	30 *	Q:Peace Officers Misc SJDA Investigators
RO2060:	Executive Secretary	1	1	1	G:Office & Office Technical SEIU
RL0310:	Legal Administrative Supervisor	1	1	1	R:Supervisors Unit SEIU
- RL0302:	Legal Technician II	34	34	34	G:Office & Office Technical SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	2	2	2	G:Office & Office Technical SEIU
RI0110:	Office Systems Specialist	1	1	1	F:ParaProfessional & Tech SEIU
RO6700:	Office Technician/Coordinator		1 *	1 *	G:Office & Office Technical SEIU
- RL0102:	Paralegal II	15	15	15	F:ParaProfessional & Tech SEIU
RB0205:	Public Information Specialist	1	1	1	F:ParaProfessional & Tech SEIU
RL0303:	Senior Legal Technician	5	5	5	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	9	9	9	G:Office & Office Technical SEIU
RC2001:	Stock Clerk II	2	2	2	I:Trades, Labor, & Institutional SEIU
- RS6002:	Victim Witness Advocate II	4	4	4	F:ParaProfessional & Tech SEIU
RS6003:	Victim Witness Advocate III		1 *	1 *	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>225.0</b>	<b>236.0 *</b>	<b>236.0 *</b>	
	<b>Temporary (FTE)</b>	<b>8.5</b>	<b>10.5 *</b>	<b>10.5 *</b>	
	<b>Position Total</b>	<b>233.5</b>	<b>246.5 *</b>	<b>246.5 *</b>	
<b>Budget Unit 2020204000 DA-FAMILY JUSTICE CENTER</b>					
- RO6110:	Senior Office Assistant	3	1 *	1 *	G:Office & Office Technical SEIU
- RS6002:	Victim Witness Advocate II	2	1 *	1 *	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>5.0</b>	<b>2.0 *</b>	<b>2.0 *</b>	
	<b>Temporary (FTE)</b>	<b>1.5</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>6.5</b>	<b>2.0 *</b>	<b>2.0 *</b>	
<b>Budget Unit 2020205000 DA-VICTIM ASSISTANCE</b>					
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
- RO6022:	Victim Claims Specialist II	8	8	8	F:ParaProfessional & Tech SEIU
RS6025:	Victim Claims Supervisor	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>10.0</b>	<b>10.0</b>	<b>10.0</b>	
	<b>Position Total</b>	<b>10.0</b>	<b>10.0</b>	<b>10.0</b>	



# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 2020206000 DA-CONSUMER FRAUD-PROP 64</b>					
EL2391:Chief Deputy District Attorney		1	*	*	B:Senior Management Unrepresented
- RL2014:Deputy District Attorney IV		5	1 *	1 *	T:Attorney Bargaining Unit
RL3012:District Attorney Investigative Assistant II		2	*	*	H:Safety, Investigative, & Custodial SEIU
- RL3022:District Attorney Investigator II		3	2 *	2 *	Q:Peace Officers Misc SJDA Investigators
- RL0302:Legal Technician II		2	*	*	G:Office & Office Technical SEIU
- RL0102:Paralegal II		5	2 *	2 *	F:ParaProfessional & Tech SEIU
- RO6110:Senior Office Assistant		1	*	*	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>19.0</b>	<b>5.0 *</b>	<b>5.0 *</b>	
<b>Position Total</b>		<b>19.0</b>	<b>5.0 *</b>	<b>5.0 *</b>	
<b>Budget Unit 2020209000 DA-CHILD ABDUCTION</b>					
- RL3012:District Attorney Investigative Assistant II		1	1	1	H:Safety, Investigative, & Custodial SEIU
- RL3022:District Attorney Investigator II		1	1	1	Q:Peace Officers Misc SJDA Investigators
- RO6110:Senior Office Assistant		1	1	1	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
<b>Position Total</b>		<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
<b>Budget Unit 2020217000 DA-PUBLIC ASSISTANCE FRAUD</b>					
RL2023:District Attorney Investigator III		1	1	1	J:Sheriffs Management SJC LEMA
- RL3012:District Attorney Investigative Assistant II		4	4	4	H:Safety, Investigative, & Custodial SEIU
- RL3022:District Attorney Investigator II		10	12 *	12 *	Q:Peace Officers Misc SJDA Investigators
- RL0302:Legal Technician II		2	2	2	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>17.0</b>	<b>19.0 *</b>	<b>19.0 *</b>	
<b>Position Total</b>		<b>17.0</b>	<b>19.0 *</b>	<b>19.0 *</b>	
<b>Budget Unit 2020273000 DA-VICTIM WITNESS PROG</b>					
RS6040:Victim Witness Program Manager		1	1	1	C:Middle Management SJCMA
- RO6110:Senior Office Assistant		2	2	2	G:Office & Office Technical SEIU
- RS6002:Victim Witness Advocate II		13	13	13	F:ParaProfessional & Tech SEIU
RS6003:Victim Witness Advocate III		1	1	1	F:ParaProfessional & Tech SEIU
RS6005:Victim Witness Advocate Supervisor		2	2	2	R:Supervisors Unit SEIU
<b>Allocated Total</b>		<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	
<b>Position Total</b>		<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	
<b>Budget Unit 2020278250 DA-CRIMINAL RESTITUTION PROG</b>					
- RL0102:Paralegal II		2	2	2	F:ParaProfessional & Tech SEIU
- RO6110:Senior Office Assistant		1	1	1	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
<b>Position Total</b>		<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
<b>Budget Unit 2020300000 CHILD SUPPORT</b>					
HL1300:Director of Child Support Services		1	1	1	A:Executive Unrepresented
EL2300:Assisant Director of Child Support Services		1	1	1	B:Senior Management Unrepresented
RL1055:Child Support Program Manager		5	5	5	C:Middle Management SJCMA
RM0226:Management Analyst III		1	1	1	C:Middle Management SJCMA
RL2005:Principal Child Support Attorney		1	1	1	C:Middle Management SJCMA
- RB4002:Accountant II		1	1	1	F:ParaProfessional & Tech SEIU
RB4003:Accountant III		1	1	1	F:ParaProfessional & Tech SEIU
- RB6001:Administrative Assistant I		1	1	1	F:ParaProfessional & Tech SEIU
RB6002:Administrative Assistant II		1	1	1	F:ParaProfessional & Tech SEIU
RO2050:Administrative Secretary		1	1	1	G:Office & Office Technical SEIU
- RB6205:Business Analyst II		2	2	2	F:ParaProfessional & Tech SEIU
- RL2004:Child Support Attorney IV		5	5	5	T:Attorney Bargaining Unit
- RL1002:Child Support Officer II		91	91	91	F:ParaProfessional & Tech SEIU
RL1003:Child Support Officer III		16	16	16	F:ParaProfessional & Tech SEIU
RL1010:Child Support Supervisor		13	13	13	R:Supervisors Unit SEIU
RL1021:Child Suppt Compliance Analyst		2	2	2	F:ParaProfessional & Tech SEIU
RL3050:Civil Process Server		2	2	2	H:Safety, Investigative, & Custodial SEIU
RO6115:Office Assistant Specialist		1	1	1	G:Office & Office Technical SEIU
RO1000:Office Supervisor		3	3	3	R:Supervisors Unit SEIU
- RL0102:Paralegal II		1	1	1	F:ParaProfessional & Tech SEIU
- RO6110:Senior Office Assistant		45	36 *	36 *	G:Office & Office Technical SEIU
RC2001:Stock Clerk II		1	1	1	I:Trades, Labor, & Institutional SEIU
RC2011:Storekeeper I		1	1	1	I:Trades, Labor, & Institutional SEIU
<b>Allocated Total</b>		<b>197.0</b>	<b>188.0 *</b>	<b>188.0 *</b>	
<b>Temporary (FTE)</b>		<b>0.5</b>	<b>0.6 *</b>	<b>0.6 *</b>	
<b>Position Total</b>		<b>197.5</b>	<b>188.6 *</b>	<b>188.6 *</b>	

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## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 2020400000 PUBLIC DEFENDER</b>					
HL1200:	Public Defender	1	1	1	A:Executive Unrepresented
EL2200:	Assistant Public Defender	1	1	1	B:Senior Management Unrepresented
EL2201:	Chief Deputy Public Defender	2	2	2	B:Senior Management Unrepresented
RL3033:	Chief Public Defender Investigator	1	1	1	C:Middle Management SJCMA
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
- RS3042:	Clinical Social Worker II	1	1	1	E:Professional SEIU
- RI1102:	Department Information Systems Analyst II	1	1	1	E:Professional SEIU
- RL2034:	Deputy Public Defender IV	51	51	51	T:Attorney Bargaining Unit
- RL0302:	Legal Technician II	10	10	10	G:Office & Office Technical SEIU
- RL0102:	Paralegal II	1	1	1	F:ParaProfessional & Tech SEIU
RL3030:	Public Defender Investigator Assistant	4	4	4	H:Safety, Investigative, & Custodial SEIU
- RL3032:	Public Defender Investigator II	12	12	12	H:Safety, Investigative, & Custodial SEIU
RL0303:	Senior Legal Technician	1	1	1	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	3	3	3	G:Office & Office Technical SEIU
- RS3001:	Senior Social Worker	4	5 *	5 *	F:ParaProfessional & Tech SEIU
RS3403:	Social Worker III	1	*	*	F:ParaProfessional & Tech SEIU
RS3005:	Social Worker Supervisor		1 *	1 *	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>96.0</b>	<b>97.0 *</b>	<b>97.0 *</b>	
	<b>Temporary (FTE)</b>	<b>3.9</b>	<b>4.9 *</b>	<b>4.9 *</b>	
	<b>Position Total</b>	<b>99.9</b>	<b>101.9 *</b>	<b>101.9 *</b>	
<b>Budget Unit 2021200000 PRETRIAL SERVICES</b>					
RL0505:	Pretrial Program Specialist	12	12	12	H:Safety, Investigative, & Custodial SEIU
RL0510:	Pretrial Senior Program Specialist	6	6	6	H:Safety, Investigative, & Custodial SEIU
- RP2002:	Probation Officer II	3	3	3	U:Probation Officers
RP2003:	Probation Officer III	2	2	2	U:Probation Officers
RP2004:	Probation Unit Supervisor	2	2	2	U:Probation Officers
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>26.0</b>	<b>26.0</b>	<b>26.0</b>	
	<b>Temporary (FTE)</b>	<b>2.3</b>	<b>2.3</b>	<b>2.3</b>	
	<b>Position Total</b>	<b>28.3</b>	<b>28.3</b>	<b>28.3</b>	
<b>Budget Unit 2021602000 SHERIFF-BOATING SAFETY</b>					
RP1010:	Sergeant	1	1	1	L:Sheriff Sergeants SJDSgtA
- RP1003:	Deputy Sheriff II	8	8	8	K:Sheriffs Non-Management SJDSA
	<b>Allocated Total</b>	<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	
	<b>Position Total</b>	<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	
<b>Budget Unit 2021609000 SHERIFF-CAL MMET</b>					
RP1030:	Sheriffs Captain	1	1	1	J:Sheriffs Management SJC LEMA
RP1020:	Lieutenant		1 *	1 *	J:Sheriffs Management SJC LEMA
RP1010:	Sergeant		1 *	1 *	L:Sheriff Sergeants SJDSgtA
- RP1003:	Deputy Sheriff II	1	7 *	7 *	K:Sheriffs Non-Management SJDSA
RO6115:	Office Assistant Specialist		1 *	1 *	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant		1 *	1 *	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>2.0</b>	<b>12.0 *</b>	<b>12.0 *</b>	
	<b>Position Total</b>	<b>2.0</b>	<b>12.0 *</b>	<b>12.0 *</b>	
<b>Budget Unit 2021614000 SHERIFF-SPECIAL SERVICES DIVISION</b>					
RP1030:	Sheriffs Captain	1	1	1	J:Sheriffs Management SJC LEMA
RP1020:	Lieutenant	3	3	3	J:Sheriffs Management SJC LEMA
RP1010:	Sergeant	5	5	5	L:Sheriff Sergeants SJDSgtA
RP4001:	Crime Analyst	5	5	5	F:ParaProfessional & Tech SEIU
- RP1003:	Deputy Sheriff II	54	54	54	K:Sheriffs Non-Management SJDSA
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
RP4010:	Supervising Crime Analyst	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>70.0</b>	<b>70.0</b>	<b>70.0</b>	
	<b>Temporary (FTE)</b>		<b>5.9 *</b>	<b>5.9 *</b>	
	<b>Position Total</b>	<b>70.0</b>	<b>75.9 *</b>	<b>75.9 *</b>	
<b>Budget Unit 2021615000 SHERIFF-MOUNTAIN HOUSE</b>					
RP1010:	Sergeant	1	1	1	L:Sheriff Sergeants SJDSgtA
- RP1003:	Deputy Sheriff II	7	7	7	K:Sheriffs Non-Management SJDSA
	<b>Allocated Total</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	
	<b>Position Total</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 2021619000 SHERIFF-ANIMAL CONTROL</b>					
- RO6110:Senior Office Assistant		1	1	1	G:Office & Office Technical SEIU
- RP0315:Sheriffs Animal Services Officer II		10	10	10	H:Safety, Investigative, & Custodial SEIU
	<b>Allocated Total</b>	<b>11.0</b>	<b>11.0</b>	<b>11.0</b>	
	<b>Position Total</b>	<b>11.0</b>	<b>11.0</b>	<b>11.0</b>	
<b>Budget Unit 2021620000 SHERIFF-PATROL</b>					
RP1030:Sheriffs Captain		1	1	1	J:Sheriffs Management SJC LEMA
RP1020:Lieutenant		8	8	8	J:Sheriffs Management SJC LEMA
RP1010:Sergeant		13	13	13	L:Sheriff Sergeants SJDSgtA
RP4002:Civilian Crime Prevention Coordinator		1	1	1	F:ParaProfessional & Tech SEIU
RP4005:Civilian Crime Prevention Program Assistant		1	1	1	F:ParaProfessional & Tech SEIU
- RP1003:Deputy Sheriff II		98	97 *	97 *	K:Sheriffs Non-Management SJDSA
RB0205:Public Information Specialist		1	1	1	F:ParaProfessional & Tech SEIU
- RO6110:Senior Office Assistant		1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>124.0</b>	<b>123.0 *</b>	<b>123.0 *</b>	
	<b>Temporary (FTE)</b>	<b>6.3</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>130.3</b>	<b>123.0 *</b>	<b>123.0 *</b>	
<b>Budget Unit 2021622000 SHERIFF-COMMUNICATIONS</b>					
RP1020:Lieutenant		1	1	1	J:Sheriffs Management SJC LEMA
- RP0102:Communications Dispatcher II		25	25	25	G:Office & Office Technical SEIU
RP0103:Communications Dispatcher III		6	6	6	G:Office & Office Technical SEIU
RP0104:Communications Dispatcher IV		7	7	7	R:Supervisors Unit SEIU
- RO6110:Senior Office Assistant		1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>40.0</b>	<b>40.0</b>	<b>40.0</b>	
	<b>Position Total</b>	<b>40.0</b>	<b>40.0</b>	<b>40.0</b>	
<b>Budget Unit 2021626000 SHERIFF-DETECTIVES</b>					
RP1030:Sheriffs Captain		1	1	1	J:Sheriffs Management SJC LEMA
RP1020:Lieutenant		2	1 *	1 *	J:Sheriffs Management SJC LEMA
RP1010:Sergeant		5	5	5	L:Sheriff Sergeants SJDSgtA
- RP1003:Deputy Sheriff II		28	28	28	K:Sheriffs Non-Management SJDSA
- RP4012:Evidence Technician II		14	14	14	H:Safety, Investigative, & Custodial SEIU
RP4013:Evidence Technician III		1	1	1	H:Safety, Investigative, & Custodial SEIU
RO6115:Office Assistant Specialist		1	*	*	G:Office & Office Technical SEIU
- RO6110:Senior Office Assistant		4	3 *	3 *	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>56.0</b>	<b>53.0 *</b>	<b>53.0 *</b>	
	<b>Temporary (FTE)</b>	<b>0.3</b>	<b>0.3</b>	<b>0.3</b>	
	<b>Position Total</b>	<b>56.3</b>	<b>53.3 *</b>	<b>53.3 *</b>	
<b>Budget Unit 2021627000 SHERIFF-AUTO THEFT PROG</b>					
- RO6110:Senior Office Assistant		1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	
	<b>Temporary (FTE)</b>	<b>0.5</b>	<b>0.8 *</b>	<b>0.8 *</b>	
	<b>Position Total</b>	<b>1.5</b>	<b>1.8 *</b>	<b>1.8 *</b>	
<b>Budget Unit 2021628000 SHERIFF-RECORDS</b>					
RP3003:Correctional Lieutenant		1	1	1	C:Middle Management SJCMa
RO6115:Office Assistant Specialist		30	30	30	G:Office & Office Technical SEIU
RO1000:Office Supervisor		8	8	8	R:Supervisors Unit SEIU
RO1500:Senior Administrative Supervisor		2	2	2	R:Supervisors Unit SEIU
- RO6110:Senior Office Assistant		13	13	13	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>54.0</b>	<b>54.0</b>	<b>54.0</b>	
	<b>Temporary (FTE)</b>	<b>1.9</b>	<b>1.7 *</b>	<b>1.7 *</b>	
	<b>Position Total</b>	<b>55.9</b>	<b>55.7 *</b>	<b>55.7 *</b>	
<b>Budget Unit 2021635000 SHERIFF-CIVIL</b>					
RP1010:Sergeant		1	1	1	L:Sheriff Sergeants SJDSgtA
RL3050:Civil Process Server		2	2	2	H:Safety, Investigative, & Custodial SEIU
- RP1003:Deputy Sheriff II		4	4	4	K:Sheriffs Non-Management SJDSA
RO6115:Office Assistant Specialist		4	4	4	G:Office & Office Technical SEIU
RO1500:Senior Administrative Supervisor		1	1	1	R:Supervisors Unit SEIU
- RO6110:Senior Office Assistant		2	2	2	G:Office & Office Technical SEIU
- RS3001:Senior Social Worker		1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>15.0</b>	<b>15.0</b>	<b>15.0</b>	
	<b>Temporary (FTE)</b>	<b>0.7</b>	<b>0.6 *</b>	<b>0.6 *</b>	
	<b>Position Total</b>	<b>15.7</b>	<b>15.6 *</b>	<b>15.6 *</b>	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 2021645000 SHERIFF-ADMIN SUPPORT SERVICES</b>					
OP1590:	Sheriff - Coroner - Public Administrator	1	1	1	O:Exempt Unrepresented
EP2590:	Assistant Sheriff-Coroner-Public Administrator	1	1	1	B:Senior Management Unrepresented
EP2580:	Undersheriff	1	1	1	B:Senior Management Unrepresented
RP1020:	Lieutenant	1	1	1	J:Sheriffs Management SJC LEMA
RP1030:	Sheriffs Captain	1	1	1	J:Sheriffs Management SJC LEMA
RM0226:	Management Analyst III	2	2	2	C:Middle Management SJCMA
RP1010:	Sergeant	5	5	5	L:Sheriff Sergeants SJDSgtA
RB6401:	Sheriff Administrative Analyst	1	1	1	C:Middle Management SJCMA
RO3011:	Accounting Technician I	6	6	6	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	2	2	2	G:Office & Office Technical SEIU
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II		1 *	1 *	F:ParaProfessional & Tech SEIU
RP0120:	Background Investigator	3	3	3	H:Safety, Investigative, & Custodial SEIU
RB5500:	Departmental Personnel Analyst	1	1	1	D:Confidential Unrepresented
- RP1003:	Deputy Sheriff II	7	7	7	K:Sheriffs Non-Management SJDSA
RP4000:	Evidence Custodian	4	4	4	H:Safety, Investigative, & Custodial SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO6700:	Office Technician/Coordinator	1	2 *	2 *	G:Office & Office Technical SEIU
RB0205:	Public Information Specialist	1	1	1	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
RM1010:	Sheriff Director of Admin Services	1	1	1	D:Confidential Unrepresented
<b>Allocated Total</b>		<b>44.0</b>	<b>46.0 *</b>	<b>46.0 *</b>	
<b>Temporary (FTE)</b>		<b>6.7</b>	<b>6.0 *</b>	<b>6.0 *</b>	
<b>Position Total</b>		<b>50.7</b>	<b>52.0 *</b>	<b>52.0 *</b>	
<b>Budget Unit 2021649000 SHERIFF-INFORMATION SYSTEMS</b>					
RI1011:	Department Information Systems Manager	1	1	1	C:Middle Management SJCMA
- RI1102:	Department Information Systems Analyst II	4	4	4	E:Professional SEIU
RI1103:	Department Information Systems Analyst III	1	1	1	E:Professional SEIU
RI1104:	Department Information Systems Analyst IV	1	1	1	E:Professional SEIU
<b>Allocated Total</b>		<b>7.0</b>	<b>7.0</b>	<b>7.0</b>	
<b>Position Total</b>		<b>7.0</b>	<b>7.0</b>	<b>7.0</b>	
<b>Budget Unit 2021655000 SHERIFF-PATROL-SLESF-AB109</b>					
- RP1003:	Deputy Sheriff II	1	1	1	K:Sheriffs Non-Management SJDSA
<b>Allocated Total</b>		<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	
<b>Position Total</b>		<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	
<b>Budget Unit 2021657000 SHERIFF-CUSTODY-SLESF-AB109</b>					
- RP3001:	Correctional Officer	1	1	1	N:Correctional Officers SJCCOA
<b>Allocated Total</b>		<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	
<b>Position Total</b>		<b>1.0</b>	<b>1.0</b>	<b>1.0</b>	
<b>Budget Unit 2021658000 SHERIFF-COURT SERVICES</b>					
RP1030:	Sheriffs Captain	1	1	1	J:Sheriffs Management SJC LEMA
RP1020:	Lieutenant	1	1	1	J:Sheriffs Management SJC LEMA
RP1010:	Sergeant	5	5	5	L:Sheriff Sergeants SJDSgtA
- RP3001:	Correctional Officer	8	8	8	N:Correctional Officers SJCCOA
- RP1003:	Deputy Sheriff II	39	39	39	K:Sheriffs Non-Management SJDSA
<b>Allocated Total</b>		<b>54.0</b>	<b>54.0</b>	<b>54.0</b>	
<b>Temporary (FTE)</b>		<b>5.5</b>	<b>5.0 *</b>	<b>5.0 *</b>	
<b>Position Total</b>		<b>59.5</b>	<b>59.0 *</b>	<b>59.0 *</b>	
<b>Budget Unit 2022600000 SHERIFF-CUSTODY</b>					
EP2600:	Correctional Assistant Sheriff	1	1	1	B:Senior Management Unrepresented
RM1020:	Central Services Administrator	1	1	1	C:Middle Management SJCMA
RM1025:	Central Services Manager	1	1	1	C:Middle Management SJCMA
RP3010:	Correctional Captain	2	2	2	C:Middle Management SJCMA
RP3003:	Correctional Lieutenant	8	8	8	C:Middle Management SJCMA
RP0701:	Inmate Programs & Services Director	1	1	1	C:Middle Management SJCMA
RP1010:	Sergeant	2	2	2	L:Sheriff Sergeants SJDSgtA
- RP3001:	Correctional Officer	222	222	222	N:Correctional Officers SJCCOA
RP3002:	Correctional Sergeant	18	18	18	N:Correctional Officers SJCCOA
RP0710:	Custody Recreation Assistant	1	1	1	H:Safety, Investigative, & Custodial SEIU
RP0705:	Custody Recreation Supervisor	1	1	1	H:Safety, Investigative, & Custodial SEIU
- RP1003:	Deputy Sheriff II	26	26	26	K:Sheriffs Non-Management SJDSA

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RP0700:	Inmate Case Worker	1	1	1	H:Safety, Investigative, & Custodial SEIU
RP0750:	Jail Librarian	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	2	2	2	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	10	10	10	G:Office & Office Technical SEIU
- RP0722:	Sheriff Inmate Labor Specialist II	15	15	15	H:Safety, Investigative, & Custodial SEIU
RP0723:	Sheriff Inmate Labor Specialist III	2	2	2	H:Safety, Investigative, & Custodial SEIU
- RC2052:	Sheriff Materiel Specialist II	5	5	5	H:Safety, Investigative, & Custodial SEIU
RC2053:	Sheriff Materiel Specialist III	2	2	2	H:Safety, Investigative, & Custodial SEIU
Allocated Total		322.0	322.0	322.0	
Temporary (FTE)		2.3	2.2 *	2.2 *	
Position Total		324.3	324.2 *	324.2 *	
<b>Budget Unit 2022610000 SHERIFF-LOC COMM CORR-AB109</b>					
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
- RP3001:	Correctional Officer	16	16	16	N:Correctional Officers SJCCOA
RP3002:	Correctional Sergeant	2	2	2	N:Correctional Officers SJCCOA
RP0710:	Custody Recreation Assistant	1	1	1	H:Safety, Investigative, & Custodial SEIU
- RP1003:	Deputy Sheriff II	2	2	2	K:Sheriffs Non-Management SJDSA
RP0700:	Inmate Case Worker	1	1	1	H:Safety, Investigative, & Custodial SEIU
RO6115:	Office Assistant Specialist	6	6	6	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
- RS3001:	Senior Social Worker	2	2	2	F:ParaProfessional & Tech SEIU
- RP0722:	Sheriff Inmate Labor Specialist II	2	2	2	H:Safety, Investigative, & Custodial SEIU
Allocated Total		34.0	34.0	34.0	
Temporary (FTE)		0.5	0.4 *	0.4 *	
Position Total		34.5	34.4 *	34.4 *	
<b>Budget Unit 2022620000 SHERIFF-WORK PROGRAM</b>					
RP3002:	Correctional Sergeant	1	1	1	N:Correctional Officers SJCCOA
- RP1003:	Deputy Sheriff II	1	1	1	K:Sheriffs Non-Management SJDSA
RP0650:	Work Program Specialist I	5	5	5	H:Safety, Investigative, & Custodial SEIU
RP0651:	Work Program Specialist II	2	2	2	H:Safety, Investigative, & Custodial SEIU
Allocated Total		9.0	9.0	9.0	
Position Total		9.0	9.0	9.0	
<b>Budget Unit 2022621000 CORRECTIONAL HEALTH SERVICES</b>					
EM0270:	Correctional Health Administrator	1	1	1	B:Senior Management Unrepresented
RS2014:	Chief Mental Health Clinician	1	1	1	C:Middle Management SJCMa
RH1300:	Nursing Department Manager - Inpatient	1	1	1	C:Middle Management SJCMa
RH4325:	Pharmacy Manager	1	1	1	C:Middle Management SJCMa
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
- RB6205:	Business Analyst II		1 *	1 *	F:ParaProfessional & Tech SEIU
RH3100:	Dental Assistant	1	1	1	F:ParaProfessional & Tech SEIU
RF0300:	Housekeeping Service Worker	2	2	2	I:Trades, Labor, & Institutional SEIU
RB6000:	Junior Administrative Assistant	1	1	1	F:ParaProfessional & Tech SEIU
RO4203:	Medical Records Technician III	1	1	1	R:Supervisors Unit SEIU
- RS2012:	Mental Health Clinician II	9	10 *	10 *	E:Professional SEIU
RS2013:	Mental Health Clinician III	1	1	1	R:Supervisors Unit SEIU
RH2005:	Mental Health Unit Supervisor	1	1	1	R:Supervisors Unit SEIU
- RH1162:	Nurse Practitioner II - Inpatient	1	1	1	M:Registered Nurses CNA
RO6115:	Office Assistant Specialist	2	2	2	G:Office & Office Technical SEIU
RH3200:	Outpatient Clinic Assistant	3	3	3	F:ParaProfessional & Tech SEIU
RH4355:	Pharmacist	1	1	1	E:Professional SEIU
RH4453:	Pharmacy Technician III	2	2	2	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	5	5	5	G:Office & Office Technical SEIU
- RH2502:	Senior Psychiatric Technician	22	23 *	23 *	F:ParaProfessional & Tech SEIU
RH1106:	Staff Nurse V - Assistant Nursing Department Manager-Inpatient	1	1	1	M:Registered Nurses CNA
- RH1105:	Staff Nurse V Clinical Nurse - Inpatient	17	17	17	M:Registered Nurses CNA
RC2001:	Stock Clerk II	1	1	1	I:Trades, Labor, & Institutional SEIU
RC2011:	Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
Allocated Total		78.0	81.0 *	81.0 *	
Temporary (FTE)		22.1	19.4 *	19.4 *	
Position Total		100.1	100.4 *	100.4 *	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 2022700000 PROBATION-JUVENILE</b>					
RM1050:	Assistant Deputy Chief Probation Officer	1	1	1	C:Middle Management SJCMA
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	1	1	1	R:Supervisors Unit SEIU
- RP2002:	Probation Officer II	16	16	16	U:Probation Officers
RP2003:	Probation Officer III	11	11	11	U:Probation Officers
RP2004:	Probation Unit Supervisor	4	4	4	U:Probation Officers
- RO6110:	Senior Office Assistant	8	8	8	G:Office & Office Technical SEIU
- RS3001:	Senior Social Worker	4	4	4	F:ParaProfessional & Tech SEIU
RS3403:	Social Worker III	1	1	1	F:ParaProfessional & Tech SEIU
RS3005:	Social Worker Supervisor	1	1	1	R:Supervisors Unit SEIU
<b>Allocated Total</b>		<b>49.0</b>	<b>49.0</b>	<b>49.0</b>	
<b>Temporary (FTE)</b>		<b>8.3</b>	<b>7.5 *</b>	<b>7.5 *</b>	
<b>Position Total</b>		<b>57.3</b>	<b>56.5 *</b>	<b>56.5 *</b>	
<b>Budget Unit 2022702000 PROBATION-ADULT</b>					
RM1050:	Assistant Deputy Chief Probation Officer	1	1	1	C:Middle Management SJCMA
RO6115:	Office Assistant Specialist	4	4	4	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	1	1	1	R:Supervisors Unit SEIU
- RP2002:	Probation Officer II	32	32	32	U:Probation Officers
RP2003:	Probation Officer III	7	7	7	U:Probation Officers
RP2004:	Probation Unit Supervisor	5	5	5	U:Probation Officers
- RO6110:	Senior Office Assistant	13	13	13	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>64.0</b>	<b>64.0</b>	<b>64.0</b>	
<b>Temporary (FTE)</b>		<b>8.0</b>	<b>5.0 *</b>	<b>5.0 *</b>	
<b>Position Total</b>		<b>72.0</b>	<b>69.0 *</b>	<b>69.0 *</b>	
<b>Budget Unit 2022702300 PROB-ADULT-SB678</b>					
- RB6205:	Business Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RP2003:	Probation Officer III	2	2	2	U:Probation Officers
RP2004:	Probation Unit Supervisor	1	1	1	U:Probation Officers
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
<b>Allocated Total</b>		<b>6.0</b>	<b>6.0</b>	<b>6.0</b>	
<b>Position Total</b>		<b>6.0</b>	<b>6.0</b>	<b>6.0</b>	
<b>Budget Unit 2022702510 PROBATION-LOC COMM CORR-AB109</b>					
RP2005:	Deputy Chief Probation Officer	1	*	*	C:Middle Management SJCMA
RM1050:	Assistant Deputy Chief Probation Officer	1	1	1	C:Middle Management SJCMA
RM0226:	Management Analyst III		1 *	1 *	C:Middle Management SJCMA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
RB6210:	Contracts Analyst	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	2	2	2	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
- RP2002:	Probation Officer II	26	26	26	U:Probation Officers
RP2003:	Probation Officer III	12	12	12	U:Probation Officers
RP2004:	Probation Unit Supervisor	4	4	4	U:Probation Officers
- RO6110:	Senior Office Assistant	3	3	3	G:Office & Office Technical SEIU
RC2001:	Stock Clerk II	1	1	1	I:Trades, Labor, & Institutional SEIU
<b>Allocated Total</b>		<b>56.0</b>	<b>56.0</b>	<b>56.0</b>	
<b>Temporary (FTE)</b>		<b>3.0</b>	<b>3.0</b>	<b>3.0</b>	
<b>Position Total</b>		<b>59.0</b>	<b>59.0</b>	<b>59.0</b>	
<b>Budget Unit 2022745000 PROBATION-ADMINISTRATION</b>					
HP1400:	County Probation Officer	1	1	1	A:Executive Unrepresented
EL2400:	Assistant County Probation Officer	1	1	1	B:Senior Management Unrepresented
RP2005:	Deputy Chief Probation Officer	1	2 *	2 *	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	*	*	C:Middle Management SJCMA
RM0224:	Management Services Administrator	1	1	1	C:Middle Management SJCMA
RM0227:	Principal Business Analyst	1	1	1	C:Middle Management SJCMA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	2	2	2	G:Office & Office Technical SEIU
RI1104:	Department Information Systems Analyst IV	1	1	1	E:Professional SEIU

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RO6120:	Department Payroll Specialist	2	2	2	G:Office & Office Technical SEIU
RO2060:	Executive Secretary	1	1	1	G:Office & Office Technical SEIU
RO5501:	Mail Clerk	1	1	1	G:Office & Office Technical SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RP2003:	Probation Officer III	1	1	1	U:Probation Officers
RP2004:	Probation Unit Supervisor	1	1	1	U:Probation Officers
RO1500:	Senior Administrative Supervisor	1	1	1	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>22.0</b>	<b>22.0</b>	<b>22.0</b>	
	<b>Temporary (FTE)</b>	<b>6.6</b>	<b>6.6</b>	<b>6.6</b>	
	<b>Position Total</b>	<b>28.6</b>	<b>28.6</b>	<b>28.6</b>	
<b>Budget Unit 2022785000 AB118-ELEAS-COPS-JJP</b>					
- RP2002:	Probation Officer II	12	12	12	U:Probation Officers
RP2003:	Probation Officer III	4	4	4	U:Probation Officers
RP2004:	Probation Unit Supervisor	4	4	4	U:Probation Officers
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>21.0</b>	<b>21.0</b>	<b>21.0</b>	
	<b>Temporary (FTE)</b>	<b>1.5</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>22.5</b>	<b>21.0 *</b>	<b>21.0 *</b>	
<b>Budget Unit 2022800000 PROBATION-JUVENILE DETENTION</b>					
RP2005:	Deputy Chief Probation Officer	1	1	1	C:Middle Management SJCMA
RM1050:	Assistant Deputy Chief Probation Officer	2	2	2	C:Middle Management SJCMA
RP0710:	Custody Recreation Assistant	1	1	1	H:Safety, Investigative, & Custodial SEIU
- RP2506:	Juvenile Detention Officer	64	56 *	56 *	H:Safety, Investigative, & Custodial SEIU
RP2510:	Juvenile Detention Unit Supervisor	21	19 *	19 *	H:Safety, Investigative, & Custodial SEIU
RP2515:	Juvenile Facility Supervisor	7	7	7	H:Safety, Investigative, & Custodial SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
- RP2002:	Probation Officer II	7	7	7	U:Probation Officers
RP2003:	Probation Officer III	5	5	5	U:Probation Officers
RP2004:	Probation Unit Supervisor	3	3	3	U:Probation Officers
- RO6110:	Senior Office Assistant	3	3	3	G:Office & Office Technical SEIU
RC2001:	Stock Clerk II	1	*	*	I:Trades, Labor, & Institutional SEIU
RC2011:	Storekeeper I		1 *	1 *	I:Trades, Labor, & Institutional SEIU
RC2012:	Storekeeper II	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>119.0</b>	<b>109.0 *</b>	<b>109.0 *</b>	
	<b>Temporary (FTE)</b>	<b>7.2</b>	<b>10.6 *</b>	<b>10.6 *</b>	
	<b>Position Total</b>	<b>126.2</b>	<b>119.6 *</b>	<b>119.6 *</b>	
<b>Budget Unit 2023060000 WATER RESOURCES</b>					
EC2155:	Water Resource Coordinator	1	1	1	B:Senior Management Unrepresented
- RE1005:	Engineer V	2	2	2	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
- RB6002:	Administrative Assistant II	2	2	2	F:ParaProfessional & Tech SEIU
- RE1004:	Engineer IV	2	2	2	E:Professional SEIU
- RE0112:	Engineering Assistant II	2	2	2	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	3	3	3	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>13.0</b>	<b>13.0</b>	<b>13.0</b>	
	<b>Temporary (FTE)</b>	<b>2.3</b>	<b>2.3</b>	<b>2.3</b>	
	<b>Position Total</b>	<b>15.3</b>	<b>15.3</b>	<b>15.3</b>	
<b>Budget Unit 2024100000 FLOOD CHANNEL MAINTENANCE</b>					
RM0335:	Channel Maintenance Superintendent	1	1	1	C:Middle Management SJCMA
RC1000:	Public Works Maintenance Manager	1	1	1	C:Middle Management SJCMA
RC1005:	Equipment Operator Foreman	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0651:	Equipment Operator I	9	9	9	I:Trades, Labor, & Institutional SEIU
RC0652:	Equipment Operator II	4	4	4	I:Trades, Labor, & Institutional SEIU
- RC0501:	Highway Maintenance Worker	8	8	8	I:Trades, Labor, & Institutional SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
- RC0572:	Pest Abatement Operator II	1	1	1	I:Trades, Labor, & Institutional SEIU
- RE0101:	Senior Engineering Aide	1	1	1	F:ParaProfessional & Tech SEIU
RC0420:	Welder	1	1	1	I:Trades, Labor, & Institutional SEIU
	<b>Allocated Total</b>	<b>28.0</b>	<b>28.0</b>	<b>28.0</b>	
	<b>Temporary (FTE)</b>	<b>1.5</b>	<b>1.5</b>	<b>1.5</b>	
	<b>Position Total</b>	<b>29.5</b>	<b>29.5</b>	<b>29.5</b>	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 2024700000 AGRICULTURAL COMMISSIONER</b>					
HA1100:	Agricultural Commissioner/Sealer	1	1	1	A:Executive Unrepresented
EA2200:	Assistant Agricultural Commissioner	1	1	1	B:Senior Management Unrepresented
RM0120:	Deputy Agricultural Commissioner	4	4	4	C:Middle Management SJCMA
RM0110:	Deputy Sealer Of Weights & Measures	1	1	1	C:Middle Management SJCMA
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
RO2050:	Administrative Secretary	1	1	1	G:Office & Office Technical SEIU
- RA0177:	Ag Bio/Standards Inspector III	25	25	25	E:Professional SEIU
RA0178:	Ag Bio/Standards Inspector IV	2	2	2	R:Supervisors Unit SEIU
RA0160:	Agricultural & Standards Technician	1	1	1	I:Trades, Labor, & Institutional SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	3	3	3	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>43.0</b>	<b>43.0</b>	<b>43.0</b>	
	<b>Temporary (FTE)</b>	<b>12.0</b>	<b>13.7 *</b>	<b>13.7 *</b>	
	<b>Position Total</b>	<b>55.0</b>	<b>56.7 *</b>	<b>56.7 *</b>	
<b>Budget Unit 2025600000 COMMUNITY DEVELOPMENT SERVICES</b>					
HE1100:	Director of Community Development	1	1	1	A:Executive Unrepresented
EE1105:	Assistant Director of Community Development	1	1	1	B:Senior Management Unrepresented
EE4010:	Code Enforcement Division Chief	1	1	1	B:Senior Management Unrepresented
EC2150:	Deputy Director Building Inspection	1	1	1	B:Senior Management Unrepresented
EE2101:	Deputy Director of Planning	1	1	1	B:Senior Management Unrepresented
RE4004:	Code Enforcement Manager	1	1	1	C:Middle Management SJCMA
RP6030:	Deputy Fire Warden	1	1	1	C:Middle Management SJCMA
RI4006:	Geographic Information Systems Program Manager	1	1	1	C:Middle Management SJCMA
RM0226:	Management Analyst III		1 *	1 *	C:Middle Management SJCMA
RE2003:	Principal Planner	1	1	1	C:Middle Management SJCMA
RE2004:	Senior Planner	3	3	3	C:Middle Management SJCMA
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
- RE2002:	Associate Planner	5	5	5	E:Professional SEIU
- RC0102:	Building Inspector II	6	6	6	F:ParaProfessional & Tech SEIU
- RE4002:	Code Enforcement Officer II	7	7	7	H:Safety, Investigative, & Custodial SEIU
RE0301:	Development Services Senior Technician	1	1	1	F:ParaProfessional & Tech SEIU
RE0300:	Development Services Technician	5	5	5	F:ParaProfessional & Tech SEIU
RP6035:	Fire Prevention Inspector	1	1	1	F:ParaProfessional & Tech SEIU
- RI4102:	Geographic Information Systems Specialist II	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	2	2	2	G:Office & Office Technical SEIU
- RE1101:	Plan Check Engineer II	2	2	2	E:Professional SEIU
RI4203:	Principal Geographic Information System Analyst	1	1	1	E:Professional SEIU
RC0103:	Senior Building Inspector	3	3	3	R:Supervisors Unit SEIU
RE4003:	Senior Code Enforcement Officer	2	2	2	H:Safety, Investigative, & Custodial SEIU
RI4202:	Senior Geographic Information Systems Analyst	1	1	1	E:Professional SEIU
- RO6110:	Senior Office Assistant	6	6	6	G:Office & Office Technical SEIU
RE1102:	Senior Plan Check Engineer	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>60.0</b>	<b>61.0 *</b>	<b>61.0 *</b>	
	<b>Temporary (FTE)</b>	<b>0.6</b>	<b>1.0 *</b>	<b>1.0 *</b>	
	<b>Position Total</b>	<b>60.6</b>	<b>62.0 *</b>	<b>62.0 *</b>	
<b>Budget Unit 2025700000 SHERIFF-PUBLIC ADMINISTRATOR</b>					
RM0245:	Chief Deputy Public Administrator	1	1	1	C:Middle Management SJCMA
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
- RM0241:	Deputy Public Administrator II	3	3	3	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>5.0</b>	<b>5.0</b>	<b>5.0</b>	
	<b>Position Total</b>	<b>5.0</b>	<b>5.0</b>	<b>5.0</b>	
<b>Budget Unit 2025900000 RECORDER-COUNTY CLERK</b>					
RM0910:	Recorder-County Clerk Operations Manager	1	1	1	C:Middle Management SJCMA
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
- RI1102:	Department Information Systems Analyst II		1 *	1 *	E:Professional SEIU
RO1000:	Office Supervisor	1	1	1	R:Supervisors Unit SEIU
RO4400:	Recordable Documents Examiner	4	4	4	G:Office & Office Technical SEIU
RO4405:	Recordable Documents Indexer	1	1	1	G:Office & Office Technical SEIU



# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RO4450:	Recorder-County Clerk Operations Supervisor	1	1	1	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	15	15	15	G:Office & Office Technical SEIU
RO4401:	Senior Recordable Documents Examiner	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>25.0</b>	<b>26.0 *</b>	<b>26.0 *</b>	
	<b>Temporary (FTE)</b>	<b>0.3</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>25.3</b>	<b>26.0 *</b>	<b>26.0 *</b>	
<b>Budget Unit 2026000000 EMERGENCY SERVICES</b>					
EB1805:	Deputy Director of Emergency Operations	1	1	1	B:Senior Management Unrepresented
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RP0602:	Emergency Planner	3	3	3	F:ParaProfessional & Tech SEIU
RB0205:	Public Information Specialist	1	1	1	F:ParaProfessional & Tech SEIU
RP0604:	Senior Emergency Planner	2	2	2	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>10.0</b>	<b>10.0</b>	<b>10.0</b>	
	<b>Temporary (FTE)</b>	<b>1.3 *</b>	<b>1.3 *</b>	<b>1.3 *</b>	
	<b>Position Total</b>	<b>10.0</b>	<b>11.3 *</b>	<b>11.3 *</b>	
<b>Budget Unit 3030101000 PUBLIC WORKS-ADMINISTRATION</b>					
HC1100:	Director of Public Works	1	1	1	A:Executive Unrepresented
EC2101:	Deputy Director-Public Works	3	3	3	B:Senior Management Unrepresented
EC2102:	Public Works Business Administrator	1	1	1	B:Senior Management Unrepresented
RB3010:	Accounting Manager	1	1	1	C:Middle Management SJCMA
- RB4002:	Accountant II	2	2	2	F:ParaProfessional & Tech SEIU
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	2	2	2	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RI4201:	Associate Geographic Information Systems Analyst	1	1	1	E:Professional SEIU
RO6120:	Department Payroll Specialist	1	1	1	G:Office & Office Technical SEIU
RO2060:	Executive Secretary	1	1	1	G:Office & Office Technical SEIU
- RI4102:	Geographic Information Systems Specialist II	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
RI4203:	Principal Geographic Information System Analyst	1	1	1	E:Professional SEIU
RO1050:	Public Works Records Supervisor	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	6	6	6	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>29</b>	<b>29.0</b>	<b>29.0</b>	
	<b>Temporary (FTE)</b>	<b>3.8</b>	<b>3.0 *</b>	<b>3.0 *</b>	
	<b>Position Total</b>	<b>32.8</b>	<b>32.0 *</b>	<b>32.0 *</b>	
<b>Budget Unit 3030103000 PUBLIC WORKS-ENGINEERING</b>					
EC2165:	Engineering Services Manager	2	2	2	B:Senior Management Unrepresented
- RE1005:	Engineer V	3	3	3	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
RE2004:	Senior Planner	1	1	1	C:Middle Management SJCMA
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II	3	3	3	F:ParaProfessional & Tech SEIU
RE5001:	Assistant Real Property Agent	1	1	1	F:ParaProfessional & Tech SEIU
- RE2002:	Associate Planner	1	1	1	E:Professional SEIU
RE5002:	Associate Real Property Agent	1	1	1	F:ParaProfessional & Tech SEIU
- RE1004:	Engineer IV	16	16	16	E:Professional SEIU
- RE0112:	Engineering Assistant II	17	17	17	F:ParaProfessional & Tech SEIU
RE0113:	Engineering Assistant III	3	3	3	F:ParaProfessional & Tech SEIU
RE3001:	Licensed Land Surveyor	1	1	1	E:Professional SEIU
- RB6512:	Management Analyst II	2	2	2	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
- RE0101:	Senior Engineering Aide	11	11	11	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>67.0</b>	<b>67.0</b>	<b>67.0</b>	
	<b>Temporary (FTE)</b>	<b>2.7</b>	<b>2.7</b>	<b>2.7</b>	
	<b>Position Total</b>	<b>69.7</b>	<b>69.7</b>	<b>69.7</b>	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 3030105000 PUBLIC WORKS-ROAD MAINT</b>					
RM0330:	Maintenance Superintendent	1	1	1	C:Middle Management SJCMA
RC1000:	Public Works Maintenance Manager	5	5	5	C:Middle Management SJCMA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RC1006:	Bridge Maintenance Foreman	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0502:	Bridge Maintenance Worker	4	4	4	I:Trades, Labor, & Institutional SEIU
RC1503:	Bridge Tender	1	1	1	I:Trades, Labor, & Institutional SEIU
- RE0112:	Engineering Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RC1005:	Equipment Operator Foreman	4	4	4	I:Trades, Labor, & Institutional SEIU
RC0651:	Equipment Operator I	21	21	21	I:Trades, Labor, & Institutional SEIU
RC0652:	Equipment Operator II	8	8	8	I:Trades, Labor, & Institutional SEIU
- RC0501:	Highway Maintenance Worker	38	38	38	I:Trades, Labor, & Institutional SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
RC2011:	Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
RC1003:	Traffic Foreman	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0510:	Traffic Sign Fabricator	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0551:	Traffic Striper Operator I	2	2	2	I:Trades, Labor, & Institutional SEIU
RC0552:	Traffic Striper Operator II	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0507:	Tree Crew Supervisor	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0506:	Tree Crew Worker	3	3	3	I:Trades, Labor, & Institutional SEIU
	<b>Allocated Total</b>	<b>99.0</b>	<b>99.0</b>	<b>99.0</b>	
	<b>Temporary (FTE)</b>	<b>5.2</b>	<b>5.2</b>	<b>5.2</b>	
	<b>Position Total</b>	<b>104.2</b>	<b>104.2</b>	<b>104.2</b>	
<b>Budget Unit 3030108000 PUBLIC WORKS-PUBLIC SERVICES</b>					
EC2165:	Engineering Services Manager	1	1	1	B:Senior Management Unrepresented
- RE1004:	Engineer IV	1	2 *	2 *	E:Professional SEIU
- RE0112:	Engineering Assistant II	2	2	2	F:ParaProfessional & Tech SEIU
- RE0101:	Senior Engineering Aide	1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>5.0</b>	<b>6.0 *</b>	<b>6.0 *</b>	
	<b>Position Total</b>	<b>5.0</b>	<b>6.0 *</b>	<b>6.0 *</b>	
<b>Budget Unit 3030900000 COMMUNITY INFRA-ENGINEERIN SVS</b>					
- RE1005:	Engineer V	1	1	1	C:Middle Management SJCMA
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
- RE1004:	Engineer IV	2	2	2	E:Professional SEIU
- RE0112:	Engineering Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RE0113:	Engineering Assistant III	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>7.0</b>	<b>7.0</b>	<b>7.0</b>	
	<b>Temporary (FTE)</b>	<b>0.8</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>7.8</b>	<b>7.0 *</b>	<b>7.0 *</b>	
<b>Budget Unit 4040300000 MENTAL HEALTH- PHARMACY</b>					
RH4325:	Pharmacy Manager	1	1	1	C:Middle Management SJCMA
RH4355:	Pharmacist	1	1	1	E:Professional SEIU
RH4350:	Pharmacist - Clinical	1	1	1	E:Professional SEIU
RH4453:	Pharmacy Technician III	5	5	5	F:ParaProfessional & Tech SEIU
RH4454:	Pharmacy Technician III - Supervisor	1	1	1	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>11.0</b>	<b>11.0</b>	<b>11.0</b>	
	<b>Temporary (FTE)</b>	<b>6.0</b>	<b>3.8 *</b>	<b>3.8 *</b>	
	<b>Position Total</b>	<b>17.0</b>	<b>14.8 *</b>	<b>14.8 *</b>	
<b>Budget Unit 4040500000 MENTAL HEALTH SERVICES</b>					
ES2312:	Deputy Director-BHS-Clinical	3	3	3	B:Senior Management Unrepresented
EH8001:	Physician Manager	1	1	1	S:Physicians Management Unrepresented
RS2014:	Chief Mental Health Clinician	22	27 *	27 *	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
RH1320:	Nursing Department Manager - Ambulatory	1	1	1	C:Middle Management SJCMA
EH8003:	Psychiatrist	17	17	17	P:Physicians UAPD
RB6002:	Administrative Assistant II	1	2 *	2 *	F:ParaProfessional & Tech SEIU
RH2505:	Chief Psychiatric Technician	8	8	8	R:Supervisors Unit SEIU
- RS5002:	Employment Training Specialist II	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	2	8 *	8 *	F:ParaProfessional & Tech SEIU
- RH1505:	Mental Health Charge Nurse - Inpatient	20	20	20	M:Registered Nurses CNA

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
- RS2012:	Mental Health Clinician II	121	121	121	E:Professional SEIU
RS2013:	Mental Health Clinician III	31	32 *	32 *	R:Supervisors Unit SEIU
RS2053:	Mental Health Consumer Outreach Coordinator	1	1	1	R:Supervisors Unit SEIU
RS2035:	Mental Health Court Liaison	1	1	1	F:ParaProfessional & Tech SEIU
- RS2022:	Mental Health Interpreter II	7	8 *	8 *	F:ParaProfessional & Tech SEIU
RS2051:	Mental Health Outreach Worker	54	58 *	58 *	F:ParaProfessional & Tech SEIU
RS2003:	Mental Health Specialist III	3	7 *	7 *	R:Supervisors Unit SEIU
- RH1166:	Nurse Practitioner II - Ambulatory	2	2	2	M:Registered Nurses CNA
RO6115:	Office Assistant Specialist	10	11 *	11 *	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	6	7 *	7 *	R:Supervisors Unit SEIU
- RS3013:	Protective Services Social Worker III	2	2	2	F:ParaProfessional & Tech SEIU
RH7800:	Psychiatric Rehab Therapy Assistant	2	3 *	3 *	F:ParaProfessional & Tech SEIU
RH6601:	Rehabilitation Therapist I	1	1	1	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	59	62 *	62 *	G:Office & Office Technical SEIU
- RH2502:	Senior Psychiatric Technician	161	174 *	174 *	F:ParaProfessional & Tech SEIU
- RS1022:	Substance Abuse Counselor II	8	8	8	F:ParaProfessional & Tech SEIU
<b>Allocated Total</b>		<b>547.0</b>	<b>588.0 *</b>	<b>588.0 *</b>	
<b>Temporary (FTE)</b>		<b>88.6</b>	<b>84.9 *</b>	<b>84.9 *</b>	
<b>Position Total</b>		<b>635.6</b>	<b>672.9 *</b>	<b>672.9 *</b>	
<b>Budget Unit 4040600000 SUBSTANCE USE DISORDER SERVICES</b>					
ES2312:	Deputy Director-BHS-Clinical	1	1	1	B:Senior Management Unrepresented
RS2014:	Chief Mental Health Clinician	1	1	1	C:Middle Management SJCMA
RM1122:	Substance Abuse Program Manager	5	5	5	C:Middle Management SJCMA
RF0103:	Food Service Worker III		1 *	1 *	I:Trades, Labor, & Institutional SEIU
- RS2012:	Mental Health Clinician II	4	4	4	E:Professional SEIU
RS2002:	Mental Health Specialist II	2	*	*	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	1	1	1	R:Supervisors Unit SEIU
RS0302:	Perinatal Child Care Worker	4	4	4	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	8	8	8	G:Office & Office Technical SEIU
- RH2502:	Senior Psychiatric Technician		2 *	2 *	F:ParaProfessional & Tech SEIU
- RS1022:	Substance Abuse Counselor II	53	53	53	F:ParaProfessional & Tech SEIU
RS1023:	Substance Abuse Program Supervisor	7	7	7	R:Supervisors Unit SEIU
<b>Allocated Total</b>		<b>88.0</b>	<b>89.0 *</b>	<b>89.0 *</b>	
<b>Temporary (FTE)</b>		<b>21.0</b>	<b>21.0</b>	<b>21.0</b>	
<b>Position Total</b>		<b>109.0</b>	<b>110.0 *</b>	<b>110.0 *</b>	
<b>Budget Unit 4040700000 BEHAVIORAL HEALTH ADMIN</b>					
HS2000:	Chief Deputy Director-BHS	1	1	1	A:Executive Unrepresented
ES2310:	Deputy Director-BHS-Administrative	1	1	1	B:Senior Management Unrepresented
ES2312:	Deputy Director-BHS-Clinical	2	2	2	B:Senior Management Unrepresented
EH8001:	Physician Manager	1	1	1	S:Physicians Management Unrepresented
ES2300:	Senior Deputy Director - BHS	1	1	1	B:Senior Management Unrepresented
RB3010:	Accounting Manager	1	1	1	C:Middle Management SJCMA
RS2014:	Chief Mental Health Clinician	1	2 *	2 *	C:Middle Management SJCMA
RM0226:	Management Analyst III	3	3	3	C:Middle Management SJCMA
RH1300:	Nursing Department Manager - Inpatient	1	1	1	C:Middle Management SJCMA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RB4003:	Accountant III	5	5	5	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	8	8	8	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	7	7	7	G:Office & Office Technical SEIU
- RB6001:	Administrative Assistant I		1 *	1 *	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RO2050:	Administrative Secretary	1	1	1	G:Office & Office Technical SEIU
RB6211:	Contracts Supervisor	1	1	1	R:Supervisors Unit SEIU
- RC0402:	Crafts Worker II	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0403:	Crafts Worker III	3	3	3	I:Trades, Labor, & Institutional SEIU
RC0404:	Crafts Worker IV	1	1	1	R:Supervisors Unit SEIU
RO6120:	Department Payroll Specialist	1	1	1	G:Office & Office Technical SEIU
RB5500:	Departmental Personnel Analyst	1	1	1	D:Confidential Unrepresented
RF0300:	Housekeeping Service Worker	9	9	9	I:Trades, Labor, & Institutional SEIU
RF0301:	Lead Housekeeper	1	1	1	R:Supervisors Unit SEIU
- RB6512:	Management Analyst II	6	8 *	8 *	F:ParaProfessional & Tech SEIU
RO4203:	Medical Records Technician III	1	1	1	R:Supervisors Unit SEIU
- RH1505:	Mental Health Charge Nurse - Inpatient	3	2 *	2 *	M:Registered Nurses CNA

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## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
- RS2012:	Mental Health Clinician II	2	2	2	E:Professional SEIU
RS2013:	Mental Health Clinician III	2	2	2	R:Supervisors Unit SEIU
RS2003:	Mental Health Specialist III		1 *	1 *	R:Supervisors Unit SEIU
RB6515:	Mental Health Support Services Coordinator	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	4	4	4	G:Office & Office Technical SEIU
RC4001:	Office Building Engineer	1	1	1	I:Trades, Labor, & Institutional SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	3	3	3	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	10	10	10	G:Office & Office Technical SEIU
- RH2502:	Senior Psychiatric Technician	2	3 *	3 *	F:ParaProfessional & Tech SEIU
RC2001:	Stock Clerk II	1	1	1	I:Trades, Labor, & Institutional SEIU
RC2011:	Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
RS1023:	Substance Abuse Program Supervisor	1	1	1	R:Supervisors Unit SEIU
<b>Allocated Total</b>		<b>92.0</b>	<b>97.0 *</b>	<b>97.0 *</b>	
<b>Temporary (FTE)</b>		<b>12.9</b>	<b>15.4 *</b>	<b>15.4 *</b>	
<b>Position Total</b>		<b>104.9</b>	<b>112.4 *</b>	<b>112.4 *</b>	
<b>Budget Unit 4040800000 UTILITY DISTRICTS</b>					
RM0360:	Utility District Assistant Superintendent	1	1	1	C:Middle Management SJCMa
RM0340:	Utility District Superintendent	1	1	1	C:Middle Management SJCMa
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
- RE0112:	Engineering Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RC0651:	Equipment Operator I	1	1	1	I:Trades, Labor, & Institutional SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
RC0515:	Utility District Laboratory Technician	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0525:	Utility District Maintenance Supervisor	2	2	2	I:Trades, Labor, & Institutional SEIU
- RC0522:	Utility District Maintenance Worker II	15	15	15	I:Trades, Labor, & Institutional SEIU
<b>Allocated Total</b>		<b>24.0</b>	<b>24.0</b>	<b>24.0</b>	
<b>Position Total</b>		<b>24.0</b>	<b>24.0</b>	<b>24.0</b>	
<b>Budget Unit 4041000000 PUBLIC HEALTH SVS</b>					
EH2200:	Chief Deputy Director-Public Health Services	1	1	1	A:Executive Unrepresented
ES2203:	Assistant Health Officer	1	1	1	B:Senior Management Unrepresented
ES2201:	Deputy Director - Public Health Services	1	1	1	B:Senior Management Unrepresented
EH4090:	Director of Public Health Laboratory Services	2	2	2	B:Senior Management Unrepresented
ES2202:	Public Health Officer	1	1	1	B:Senior Management Unrepresented
ES2200:	Senior Deputy Director - Public Health Services	2	2	2	B:Senior Management Unrepresented
RB3010:	Accounting Manager	1	1	1	C:Middle Management SJCMa
RM0226:	Management Analyst III	4	4	4	C:Middle Management SJCMa
RM0224:	Management Services Administrator	1	1	1	C:Middle Management SJCMa
RM1181:	Program Coordinator - Public Health Education	1	1	1	C:Middle Management SJCMa
RS7105:	Program Coordinator WIC	1	1	1	C:Middle Management SJCMa
RM1182:	Program Coordinator-AIDS	1	1	1	C:Middle Management SJCMa
RH1820:	Program Manager-Public Health Nursing	2	2	2	C:Middle Management SJCMa
RP0610:	Public Health Emergency Preparedness Coordinator	1	1	1	C:Middle Management SJCMa
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	3	3	3	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RO2050:	Administrative Secretary	1	1	1	G:Office & Office Technical SEIU
RS4222:	AIDS Case Worker	2	2	2	F:ParaProfessional & Tech SEIU
- RB6205:	Business Analyst II	3	3	3	F:ParaProfessional & Tech SEIU
RS0200:	Case Manager	6	6	6	E:Professional SEIU
RS0201:	Case Manager Supervisor	1	1	1	R:Supervisors Unit SEIU
RS4110:	Communicable Disease Investigator	33	30 *	30 *	F:ParaProfessional & Tech SEIU
RI1104:	Department Information Systems Analyst IV	1	1	1	E:Professional SEIU
RP0602:	Emergency Planner	1	1	1	F:ParaProfessional & Tech SEIU
RB6900:	Epidemiologist	7	7	7	E:Professional SEIU
- RI4102:	Geographic Information Systems Specialist II	1	*	*	F:ParaProfessional & Tech SEIU
RS9215:	Lactation Specialist	1	*	*	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	4	4	4	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	3	1 *	1 *	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	3	2 *	2 *	R:Supervisors Unit SEIU
RI0110:	Office Systems Specialist	1	1	1	F:ParaProfessional & Tech SEIU
RO6700:	Office Technician/Coordinator	2	2	2	G:Office & Office Technical SEIU
RS4101:	Public Health Educator	23	23	23	E:Professional SEIU

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
- RH4961:	Public Health Laboratory Technician II	3	2 *	2 *	F:ParaProfessional & Tech SEIU
- RH4212:	Public Health Microbiologist II	8	8	8	E:Professional SEIU
	RH8501:Public Health Nutritionist	1	1	1	E:Professional SEIU
	RB0205:Public Information Specialist	1	1	1	F:ParaProfessional & Tech SEIU
	RS4115:Senior Communicable Disease Investigator	3	2 *	2 *	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	29	25 *	25 *	G:Office & Office Technical SEIU
	RH4203:Senior Public Health Microbiologist	3	3	3	E:Professional SEIU
- RH1813:	Senior Public Health Nurse	35	31 *	31 *	M:Registered Nurses CNA
	RH8502:Senior Public Health Nutritionist	1	1	1	E:Professional SEIU
	RC2001:Stock Clerk II	1	1	1	I:Trades, Labor, & Institutional SEIU
	RC2011:Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
	RB6905:Supervising Epidemiologist	1	1	1	R:Supervisors Unit SEIU
	RS4105:Supervising Public Health Educator	3	2 *	2 *	R:Supervisors Unit SEIU
	RH4205:Supervising Public Health Microbiologist	1	1	1	R:Supervisors Unit SEIU
	RH1815:Supervising Public Health Nurse	2	2	2	M:Registered Nurses CNA
- RO4182:	WIC Nutrition Assistant II	12	11 *	11 *	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>226.0</b>	<b>206.0 *</b>	<b>206.0 *</b>	
	<b>Temporary (FTE)</b>	<b>8.2</b>	<b>15.1 *</b>	<b>15.1 *</b>	
	<b>Position Total</b>	<b>234.2</b>	<b>221.1 *</b>	<b>221.1 *</b>	
<b>Budget Unit 4041200000 CONSERVATOR SERVICES</b>					
	EB3300:Public Guardian/Conservator	1	1	1	B:Senior Management Unrepresented
	RS2033:Chief Deputy Public Guardian	1	1	1	C:Middle Management SJCMA
	RB4003:Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
	RO3011:Accounting Technician I	5	5	5	G:Office & Office Technical SEIU
	RO3012:Accounting Technician II	3	3	3	G:Office & Office Technical SEIU
- RS2032:	Deputy Public Guardian II	8	8	8	F:ParaProfessional & Tech SEIU
	RB6000:Junior Administrative Assistant	1	1	1	F:ParaProfessional & Tech SEIU
	RO6115:Office Assistant Specialist	4	4	4	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	4	4	4	G:Office & Office Technical SEIU
	RC2011:Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
	RS2034:Supervising Deputy Public Guardian	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>30.0</b>	<b>30.0</b>	<b>30.0</b>	
	<b>Temporary (FTE)</b>	<b>1.5</b>	<b>1.5</b>	<b>1.5</b>	
	<b>Position Total</b>	<b>31.5</b>	<b>31.5</b>	<b>31.5</b>	
<b>Budget Unit 4041800000 EMERGENCY MEDICAL SERVICE AGENCY</b>					
	EH2120:Emergency Medical Services Administrator	1	1	1	B:Senior Management Unrepresented
	RH0250:Emergency Medical Services Coordinator	1	1	1	C:Middle Management SJCMA
	RO3011:Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
	RH0222:Emergency Medical Services Analyst	2	3 *	3 *	F:ParaProfessional & Tech SEIU
	RH0223:Emergency Medical Services Specialist	2	2	2	F:ParaProfessional & Tech SEIU
	RH0224:EMS Trauma Coordinator	2	2	2	M:Registered Nurses CNA
	RO6700:Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
	RH0160:Pre-Hospital Care Coordinator	1	2 *	2 *	F:ParaProfessional & Tech SEIU
	RH0221:Regional Disaster Medical Health Specialist	1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>12.0</b>	<b>14.0 *</b>	<b>14.0 *</b>	
	<b>Position Total</b>	<b>12.0</b>	<b>14.0 *</b>	<b>14.0 *</b>	
<b>Budget Unit 4042000000 ENVIRONMENTAL HEALTH</b>					
	HA1200:Director of Environmental Health	1	1	1	A:Executive Unrepresented
	EA2300:Assistant Director-Environmental Health	1	1	1	B:Senior Management Unrepresented
	RM0610:Environmental Health - Program Coordinator	6	6	6	C:Middle Management SJCMA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
	RO3011:Accounting Technician I	3	3	3	G:Office & Office Technical SEIU
- RP6012:	Hazardous Material Specialist II	2	2	2	H:Safety, Investigative, & Custodial SEIU
	RA0604:Lead Senior Registered Environmental Health Specialist	40	36 *	36 *	E:Professional SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
	RO1000:Office Supervisor	1	1	1	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	8	7 *	7 *	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>64.0</b>	<b>59.0 *</b>	<b>59.0 *</b>	
	<b>Position Total</b>	<b>64.0</b>	<b>59.0 *</b>	<b>59.0 *</b>	
<b>Budget Unit 4045415000 CALIFORNIA CHILDRENS SERVICES</b>					
	ES2203:Assistant Health Officer	1	1	1	B:Senior Management Unrepresented
	RM0810:Childrens Medical Services Manager	1	1	1	C:Middle Management SJCMA
	RH6510:Therapy Services Manager	1	1	1	C:Middle Management SJCMA
	RS0200:Case Manager	1	1	1	E:Professional SEIU
	RO6115:Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RO1000:	Office Supervisor	2	2	2	R:Supervisors Unit SEIU
- RH6205:	Physical Therapist IV - Assistant Department Manager	11	11	11	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	17	17	17	G:Office & Office Technical SEIU
- RH1813:	Senior Public Health Nurse	11	11	11	M:Registered Nurses CNA
	<b>Allocated Total</b>	<b>46.0</b>	<b>46.0</b>	<b>46.0</b>	
	<b>Temporary (FTE)</b>	<b>0.8</b>	<b>1.5 *</b>	<b>1.5 *</b>	
	<b>Position Total</b>	<b>46.8</b>	<b>47.5 *</b>	<b>47.5 *</b>	
<b>Budget Unit 4049100000 CHILDREN &amp; FAMILIES PROGRAM</b>					
ES1500:	First 5 San Joaquin Executive Director	1	1	1	B:Senior Management Unrepresented
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
RB6210:	Contracts Analyst	7	6 *	6 *	F:ParaProfessional & Tech SEIU
RB6211:	Contracts Supervisor	1	1	1	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>13.0</b>	<b>12.0 *</b>	<b>12.0 *</b>	
	<b>Position Total</b>	<b>13.0</b>	<b>12.0 *</b>	<b>12.0 *</b>	
<b>Budget Unit 4049500000 HEALTH CARE SERVICES ADMIN</b>					
HH1100:	Director Health Care Services	1	1	1	A:Executive Unrepresented
HH1105:	Assistant Director- Health Care Services	1	1	1	A:Executive Unrepresented
EI2100:	Chief Information Officer-HCS	1	1	1	B:Senior Management Unrepresented
EM0250:	Deputy Director-HCS-Fiscal	1	1	1	B:Senior Management Unrepresented
RB3010:	Accounting Manager	1	1	1	C:Middle Management SJCA
RI1011:	Department Information Systems Manager	1	1	1	C:Middle Management SJCA
RO2050:	Administrative Secretary	1	1	1	G:Office & Office Technical SEIU
- RI1202:	Department Applications Analyst II	4	4	4	E:Professional SEIU
RI1203:	Department Applications Analyst III	4	4	4	E:Professional SEIU
RI1204:	Department Applications Analyst IV	1	1	1	E:Professional SEIU
- RI1102:	Department Information Systems Analyst II	5	5	5	E:Professional SEIU
RI1103:	Department Information Systems Analyst III	3	3	3	E:Professional SEIU
RI1104:	Department Information Systems Analyst IV	1	3 *	3 *	E:Professional SEIU
- RI1302:	Department Information Systems Specialist II	1	1	1	F:ParaProfessional & Tech SEIU
RI1303:	Department Information Systems Specialist III	1	1	1	F:ParaProfessional & Tech SEIU
- RI1402:	Department Information Systems Technician II	1	1	1	F:ParaProfessional & Tech SEIU
RB5500:	Departmental Personnel Analyst	1	1	1	D:Confidential Unrepresented
RI0110:	Office Systems Specialist	1	1	1	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>30.0</b>	<b>32.0 *</b>	<b>32.0 *</b>	
	<b>Position Total</b>	<b>30.0</b>	<b>32.0 *</b>	<b>32.0 *</b>	
<b>Budget Unit 4049600000 WHOLE PERSON CARE PROGRAM</b>					
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCA
RS4302:	Community Health Outreach Worker	6	7 *	7 *	F:ParaProfessional & Tech SEIU
- RS2002:	Mental Health Specialist II	1	1	1	F:ParaProfessional & Tech SEIU
- RH1812:	Public Health Nurse II	2	2	2	M:Registered Nurses CNA
- RO6110:	Senior Office Assistant	2	3 *	3 *	G:Office & Office Technical SEIU
- RS3001:	Senior Social Worker		6 *	6 *	F:ParaProfessional & Tech SEIU
RS3005:	Social Worker Supervisor	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>13.0</b>	<b>21.0 *</b>	<b>21.0 *</b>	
	<b>Temporary (FTE)</b>	<b>0.5</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>13.5</b>	<b>21.0 *</b>	<b>21.0 *</b>	
<b>Budget Unit 4049700000 OFFICE OF THE MEDICAL EXAMINER</b>					
EP5350:	Medical Examiner Operations Administrator	1	1	1	B:Senior Management Unrepresented
RP5020:	Forensic Autopsy Technician	3	3	3	F:ParaProfessional & Tech SEIU
RP5010:	Medical Examiner Investigator	10	10	10	H:Safety, Investigative, & Custodial SEIU
- RO6110:	Senior Office Assistant	3	3	3	G:Office & Office Technical SEIU
RP5015:	Supervising Medical Examiner Investigator	2	2	2	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	
	<b>Temporary (FTE)</b>	<b>1.8</b>	<b>1.5 *</b>	<b>1.5 *</b>	
	<b>Position Total</b>	<b>20.8</b>	<b>20.5 *</b>	<b>20.5 *</b>	
<b>Budget Unit 4049800000 COUNTY SUPPORT TO PPHC-FQHC</b>					
EH8001:	Physician Manager	2	2	2	S:Physicians Management Unrepresented
RM0203:	Clinic Services Coordinator	3	3	3	C:Middle Management SJCA
RM0226:	Management Analyst III	2	2	2	C:Middle Management SJCA
RM0630:	Patient Access Services Manager - San Joaquin County Clinics	1	1	1	C:Middle Management SJCA
EH8002:	Physician	22	22	22	P:Physicians UAPD

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
- RB4002:Accountant II		1	1	1	F:ParaProfessional & Tech SEIU
RB4003:Accountant III			1 *	1 *	F:ParaProfessional & Tech SEIU
RO3012:Accounting Technician II		1	1	1	G:Office & Office Technical SEIU
- RB6001:Administrative Assistant I		1	1	1	F:ParaProfessional & Tech SEIU
RB6002:Administrative Assistant II		2	2	2	F:ParaProfessional & Tech SEIU
- RB6205:Business Analyst II			1 *	1 *	F:ParaProfessional & Tech SEIU
RS3043:Clinical Social Worker III		1	1	1	R:Supervisors Unit SEIU
RO4130:Credentialing Specialist		1	1	1	G:Office & Office Technical SEIU
- RI1102:Department Information Systems Analyst II		1	1	1	E:Professional SEIU
RI1104:Department Information Systems Analyst IV		1	2 *	2 *	E:Professional SEIU
- RI1302:Department Information Systems Specialist II		1	1	1	F:ParaProfessional & Tech SEIU
RI1303:Department Information Systems Specialist III		1	1	1	F:ParaProfessional & Tech SEIU
RO6120:Department Payroll Specialist		1	1	1	G:Office & Office Technical SEIU
RO2000:Office Secretary		1	1	1	G:Office & Office Technical SEIU
RO1000:Office Supervisor		2	2	2	R:Supervisors Unit SEIU
RI0110:Office Systems Specialist		3	3	3	F:ParaProfessional & Tech SEIU
RO6700:Office Technician/Coordinator		1	1	1	G:Office & Office Technical SEIU
RH3200:Outpatient Clinic Assistant		55	55	55	F:ParaProfessional & Tech SEIU
RH0200:Patient Registration Clerk		16	16	16	G:Office & Office Technical SEIU
RH0300:Patient Services Representative		3	3	3	F:ParaProfessional & Tech SEIU
RH4350:Pharmacist - Clinical		2	2	2	E:Professional SEIU
- RH2002:Senior Licensed Vocational Nurse		4	4	4	F:ParaProfessional & Tech SEIU
- RH1167:Senior Nurse Practitioner - Ambulatory		2	2	2	M:Registered Nurses CNA
- RH1163:Senior Nurse Practitioner - Inpatient		2	2	2	M:Registered Nurses CNA
- RO6110:Senior Office Assistant		15	15	15	G:Office & Office Technical SEIU
- RH1126:Staff Nurse V - Assistant Department Manager - Ambulatory		8	8	8	M:Registered Nurses CNA
	<b>Allocated Total</b>	<b>156.0</b>	<b>159.0 *</b>	<b>159.0 *</b>	
	<b>Temporary (FTE)</b>	<b>46.5</b>	<b>42.0 *</b>	<b>42.0 *</b>	
	<b>Position Total</b>	<b>202.5</b>	<b>201.0 *</b>	<b>201.0 *</b>	
<b>Budget Unit 5050101000 HUMAN SERVICES-ADMIN</b>					
HS1150:Director of Human Services		1	1	1	A:Executive Unrepresented
ES1155:Assistant Director of Human Services		1	1	1	B:Senior Management Unrepresented
EB2100:Deputy Director of HSA		5	5	5	B:Senior Management Unrepresented
RM0800:Child Welfare Division Chief		5	5	5	C:Middle Management SJCMA
RM0700:Department Information Systems Administrator			1 *	1 *	C:Middle Management SJCMA
RI1011:Department Information Systems Manager		1	1	1	C:Middle Management SJCMA
RM0226:Management Analyst III		4	5 *	5 *	C:Middle Management SJCMA
RM0224:Management Services Administrator		1	1	1	C:Middle Management SJCMA
RM1153:Program Manager		12	12	12	C:Middle Management SJCMA
- RB4002:Accountant II		4	4	4	F:ParaProfessional & Tech SEIU
RO3011:Accounting Technician I		13	13	13	G:Office & Office Technical SEIU
RO3012:Accounting Technician II		3	3	3	G:Office & Office Technical SEIU
- RB6001:Administrative Assistant I			1 *	1 *	F:ParaProfessional & Tech SEIU
RO2050:Administrative Secretary		2	2	2	G:Office & Office Technical SEIU
RS0110:Benefits Systems Specialist		2	2	2	F:ParaProfessional & Tech SEIU
RS0111:Benefits Systems Supervisor		1	1	1	R:Supervisors Unit SEIU
- RL2084:Child Protective Services Counsel IV		4	4	4	D:Confidential Unrepresented
- RO4602:Collections Clerk II		4	4	4	G:Office & Office Technical SEIU
RO1100:Collections Supervisor		1	1	1	R:Supervisors Unit SEIU
RB6210:Contracts Analyst		3	5 *	5 *	F:ParaProfessional & Tech SEIU
RB6211:Contracts Supervisor		1	1	1	R:Supervisors Unit SEIU
- RC0402:Crafts Worker II		1	1	1	I:Trades, Labor, & Institutional SEIU
RI1203:Department Applications Analyst III		1	1	1	E:Professional SEIU
- RI1302:Department Information Systems Specialist II		5	5	5	F:ParaProfessional & Tech SEIU
RI1303:Department Information Systems Specialist III		1	1	1	F:ParaProfessional & Tech SEIU
RO6120:Department Payroll Specialist		3	3	3	G:Office & Office Technical SEIU
RB5500:Departmental Personnel Analyst		2	2	2	D:Confidential Unrepresented
RS0105:Eligibility Supervisor		61	61	61	R:Supervisors Unit SEIU
- RS0102:Eligibility Worker II		431	431	431	F:ParaProfessional & Tech SEIU
RS0103:Eligibility Worker III		26	29 *	29 *	F:ParaProfessional & Tech SEIU
- RS5002:Employment Training Specialist II		34	34	34	F:ParaProfessional & Tech SEIU
RS5003:Employment Training Supervisor		5	5	5	R:Supervisors Unit SEIU
RO2060:Executive Secretary		1	1	1	G:Office & Office Technical SEIU
RS0180:Family Services Worker		2	2	2	F:ParaProfessional & Tech SEIU
- RS0122:HSA Program Supervisor II		5	5	5	R:Supervisors Unit SEIU
RB6201:HSA Staff Analyst I			2 *	2 *	F:ParaProfessional & Tech SEIU
- RB6202:HSA Staff Analyst II		29	34 *	34 *	F:ParaProfessional & Tech SEIU
RC1502:Lead Transportation Worker		1	1	1	H:Safety, Investigative, & Custodial SEIU



# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RL0301:	Legal Technician I	2	2	2	G:Office & Office Technical SEIU
RL0302:	Legal Technician II	1	1	1	G:Office & Office Technical SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	12	12	12	G:Office & Office Technical SEIU
RO2000:	Office Secretary	2	2	2	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	12	15 *	15 *	R:Supervisors Unit SEIU
- RL0102:	Paralegal II		2 *	2 *	F:ParaProfessional & Tech SEIU
RB0205:	Public Information Specialist		1 *	1 *	F:ParaProfessional & Tech SEIU
RO1500:	Senior Administrative Supervisor	2	2	2	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	160	171 *	171 *	G:Office & Office Technical SEIU
RO7302:	Senior Support Services Technician	1	1	1	G:Office & Office Technical SEIU
RS1075:	Shelter Social Worker	2	2	2	H:Safety, Investigative, & Custodial SEIU
- RS3402:	Social Worker II	46	50 *	50 *	F:ParaProfessional & Tech SEIU
- RS3404:	Social Worker IV	3	3	3	F:ParaProfessional & Tech SEIU
RS3410:	Social Worker Supervisor I	13	11 *	11 *	R:Supervisors Unit SEIU
RS3415:	Social Worker Supervisor II	33	36 *	36 *	R:Supervisors Unit SEIU
- RS3405:	Social Worker V	207	230 *	230 *	E:Professional SEIU
RC2001:	Stock Clerk II	4	4	4	I:Trades, Labor, & Institutional SEIU
RC2011:	Storekeeper I	2	2	2	I:Trades, Labor, & Institutional SEIU
RC2012:	Storekeeper II	1	1	1	R:Supervisors Unit SEIU
RL2085:	Supervising Child Protective Services Counsel	1	1	1	D:Confidential Unrepresented
- RO7301:	Support Services Technician II	1	1	1	G:Office & Office Technical SEIU
RC1501:	Transportation Worker	4	4	4	H:Safety, Investigative, & Custodial SEIU
- RL3041:	Welfare Fraud Specialist II	4	4	4	H:Safety, Investigative, & Custodial SEIU
<b>Allocated Total</b>		<b>1,190.0</b>	<b>1,250.0 *</b>	<b>1,250.0 *</b>	
<b>Temporary (FTE)</b>		<b>1.8</b>	<b>3.9 *</b>	<b>3.9 *</b>	
<b>Position Total</b>		<b>1,191.8</b>	<b>1,253.9 *</b>	<b>1,253.9 *</b>	

### Budget Unit 5053900000 MARY GRAHAM CHILDRENS SHELTER

ES2150:	Director Mary Graham Children's Shelter	1	1	1	B:Senior Management Unrepresented
RM1145:	Assistant Director-Mary Graham Children's Shelter	1	1	1	C:Middle Management SJCM
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
- RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RC0403:	Crafts Worker III	1	1	1	I:Trades, Labor, & Institutional SEIU
RF0300:	Housekeeping Service Worker	2	1 *	1 *	I:Trades, Labor, & Institutional SEIU
- RB6202:	HSA Staff Analyst II	1	2 *	2 *	F:ParaProfessional & Tech SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	5	5	5	G:Office & Office Technical SEIU
- RS1072:	Shelter Counselor II	42	42	42	H:Safety, Investigative, & Custodial SEIU
RS1075:	Shelter Social Worker	8	8	8	H:Safety, Investigative, & Custodial SEIU
RS1081:	Shelter Supervisor I	7	7	7	H:Safety, Investigative, & Custodial SEIU
RS1082:	Shelter Supervisor II	4	4	4	H:Safety, Investigative, & Custodial SEIU
RS3410:	Social Worker Supervisor I	1	1	1	R:Supervisors Unit SEIU
<b>Allocated Total</b>		<b>76.0</b>	<b>76.0</b>	<b>76.0</b>	
<b>Temporary (FTE)</b>		<b>3.7</b>	<b>3.7</b>	<b>3.7</b>	
<b>Position Total</b>		<b>79.7</b>	<b>79.7</b>	<b>79.7</b>	

### Budget Unit 5054101000 DEPT OF AGING-COMMUNITY SVS

RM1151:	Adult Services Division Chief	1	1	1	C:Middle Management SJCM
RM1150:	Community Services Program Manager	2	2	2	C:Middle Management SJCM
- RB4002:	Accountant II	1	2 *	2 *	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	3	3	3	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	2	2	2	G:Office & Office Technical SEIU
RS7060:	Aging Programs Coordinator	1	1	1	F:ParaProfessional & Tech SEIU
RS7010:	Community Recreation Coordinator	1	1	1	F:ParaProfessional & Tech SEIU
RS7015:	Community Social Services Assistant	8	8	8	F:ParaProfessional & Tech SEIU
RS7020:	Community Social Services Director	8	8	8	R:Supervisors Unit SEIU
RE1400:	Energy Program Specialist	5	6 *	6 *	F:ParaProfessional & Tech SEIU
RS7070:	HSA Program Coordinator	3	3	3	F:ParaProfessional & Tech SEIU
- RB6202:	HSA Staff Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RO1000:	Office Supervisor	1	*	*	R:Supervisors Unit SEIU
RS7090:	Senior Information & Assistance Specialist	3	3	3	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	6	9 *	9 *	G:Office & Office Technical SEIU
RC0302:	Senior Weatherization Specialist	3	3	3	I:Trades, Labor, & Institutional SEIU
- RS3402:	Social Worker II	6	7 *	7 *	F:ParaProfessional & Tech SEIU



# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RS3410:	Social Worker Supervisor I	2	2	2	R:Supervisors Unit SEIU
RC2011:	Storekeeper I	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0300:	Weatherization Program Supervisor	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>60.0</b>	<b>65.0 *</b>	<b>65.0 *</b>	
	<b>Temporary (FTE)</b>	<b>22.6</b>	<b>20.0 *</b>	<b>20.0 *</b>	
	<b>Position Total</b>	<b>82.6</b>	<b>85.0 *</b>	<b>85.0 *</b>	
<b>Budget Unit 5055103000 EMPLOY ECONOMIC DEVELOP DEPT</b>					
HS1250:	Director Employment & Econmic Development	1	1	1	A:Executive Unrepresented
ES2260:	Deputy Director - Employment & Training	1	2 *	2 *	B:Senior Management Unrepresented
ES2255:	EEDD Economic Development Director	1	*	*	B:Senior Management Unrepresented
RM1173:	EEDD Administrative Services Manager	1	1	1	C:Middle Management SJCMA
RM1171:	EEDD Division Manager	2	2	2	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
- RB4002:	Accountant II	2	2	2	F:ParaProfessional & Tech SEIU
RB4003:	Accountant III	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	3	3	3	G:Office & Office Technical SEIU
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
- RI1102:	Department Information Systems Analyst II	2	2	2	E:Professional SEIU
RI1103:	Department Information Systems Analyst III	1	1	1	E:Professional SEIU
RI1104:	Department Information Systems Analyst IV	1	1	1	E:Professional SEIU
- RB6302:	EEDD Analyst II	4	4	4	F:ParaProfessional & Tech SEIU
RB6303:	EEDD Analyst III	2	2	2	F:ParaProfessional & Tech SEIU
RB0615:	EEDD Business Retention Expansion Specialist	2	2	2	F:ParaProfessional & Tech SEIU
- RS5512:	EEDD Employment Services Specialist II	4	4	4	F:ParaProfessional & Tech SEIU
RC2015:	EEDD Facilities Coordinator	1	1	1	R:Supervisors Unit SEIU
- RS5502:	EEDD Intake & Referral Specialist II	5	5	5	G:Office & Office Technical SEIU
- RS5002:	Employment Training Specialist II	26	26	26	F:ParaProfessional & Tech SEIU
RS5003:	Employment Training Supervisor	5	5	5	R:Supervisors Unit SEIU
RO2060:	Executive Secretary	1	1	1	G:Office & Office Technical SEIU
RO2000:	Office Secretary	1	1	1	G:Office & Office Technical SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	6	6	6	G:Office & Office Technical SEIU
RC2001:	Stock Clerk II	1	1	1	I:Trades, Labor, & Institutional SEIU
	<b>Allocated Total</b>	<b>77.0</b>	<b>77.0</b>	<b>77.0</b>	
	<b>Temporary (FTE)</b>	<b>15.7</b>	<b>12.9 *</b>	<b>12.9 *</b>	
	<b>Position Total</b>	<b>92.7</b>	<b>89.9 *</b>	<b>89.9 *</b>	
<b>Budget Unit 5055246000 NEIGHBORHOOD PRESERVATION</b>					
ES1400:	Program Administrator-Homeless Initiatives	1	1	1	B:Senior Management Unrepresented
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
RC0202:	Housing Rehabilitation Specialist II	1	1	1	I:Trades, Labor, & Institutional SEIU
- RB6512:	Management Analyst II	2	2	2	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RO6700:	Office Technician/Coordinator	1	1	1	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>10.0</b>	<b>10.0</b>	<b>10.0</b>	
	<b>Temporary (FTE)</b>	<b>0.8</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>10.8</b>	<b>10.0 *</b>	<b>10.0 *</b>	
<b>Budget Unit 5055600000 VETERANS SERVICE OFFICE</b>					
EB2156:	Deputy Director Veterans Services	1	1	1	B:Senior Management Unrepresented
- RS2002:	Mental Health Specialist II		1 *	1 *	F:ParaProfessional & Tech SEIU
RO6700:	Office Technician/Coordinator		1 *	1 *	G:Office & Office Technical SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
- RB0802:	Veterans Service Representative II	5	6 *	6 *	F:ParaProfessional & Tech SEIU
	<b>Allocated Total</b>	<b>7.0</b>	<b>10.0 *</b>	<b>10.0 *</b>	
	<b>Temporary (FTE)</b>	<b>2.1</b>	<b>*</b>	<b>*</b>	
	<b>Position Total</b>	<b>9.1</b>	<b>10.0 *</b>	<b>10.0 *</b>	
<b>Budget Unit 6061500000 COOPERATIVE EXTENSION</b>					
- RB6001:	Administrative Assistant I	1	1	1	F:ParaProfessional & Tech SEIU
- RA0101:	Agricultural Field & Lab Technician II	1	1	1	I:Trades, Labor, & Institutional SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>4.0</b>	<b>4.0</b>	<b>4.0</b>	
	<b>Position Total</b>	<b>4.0</b>	<b>4.0</b>	<b>4.0</b>	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 7070300000 PARKS AND RECREATION</b>					
EC2202:	Parks Administrator	1	1	1	B:Senior Management Unrepresented
RC0803:	Park Maintenance Supervisor	1	1	1	C:Middle Management SJCMA
RA0702:	Zoo & Interpretive Services Manager	1	1	1	C:Middle Management SJCMA
RO3012:	Accounting Technician II	1	1	1	G:Office & Office Technical SEIU
RB6002:	Administrative Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
- RA0705:	Animal Care Specialist	5	6 *	6 *	F:ParaProfessional & Tech SEIU
RP0730:	Labor Crew Leader	1	1	1	I:Trades, Labor, & Institutional SEIU
RC3003:	Park Equipment Mechanic	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0805:	Park Fee Coordinator	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0800:	Park Worker	19	19	19	I:Trades, Labor, & Institutional SEIU
RM0100:	Parks Marketing & Promotion Specialist	1	1	1	E:Professional SEIU
RA0710:	Senior Animal Care Specialist	1	1	1	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
RC0801:	Senior Park Worker	3	3	3	R:Supervisors Unit SEIU
RM0140:	Zoo Curator	1	1	1	R:Supervisors Unit SEIU
	<b>Allocated Total</b>	<b>40.0</b>	<b>41.0 *</b>	<b>41.0 *</b>	
	<b>Temporary (FTE)</b>	<b>9.1</b>	<b>9.1</b>	<b>9.1</b>	
	<b>Position Total</b>	<b>49.1</b>	<b>50.1 *</b>	<b>50.1 *</b>	
<b>Budget Unit 8190000000 FLEET SERVICES</b>					
RC1016:	Fleet Manager	1	1	1	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
RO3011:	Accounting Technician I	3	3	3	G:Office & Office Technical SEIU
RC1001:	Automotive Maintenance Foreman	2	2	2	R:Supervisors Unit SEIU
- RC3000:	Automotive Mechanic	10	11 *	11 *	I:Trades, Labor, & Institutional SEIU
RC1002:	Equipment Maintenance Foreman	1	1	1	R:Supervisors Unit SEIU
RC2025:	Equipment Parts Room Supervisor	1	1	1	R:Supervisors Unit SEIU
RC0601:	Equipment Service Worker I	4	4	4	I:Trades, Labor, & Institutional SEIU
RC0602:	Equipment Service Worker II	3	4 *	4 *	I:Trades, Labor, & Institutional SEIU
RC0603:	Equipment Service Worker III	2	2	2	I:Trades, Labor, & Institutional SEIU
- RC2024:	Fleet Parts Specialist	3	3	3	I:Trades, Labor, & Institutional SEIU
RC1551:	Garage Attendant	1	1	1	I:Trades, Labor, & Institutional SEIU
- RC3001:	Heavy Equipment Mechanic	7	7	7	I:Trades, Labor, & Institutional SEIU
- RB6512:	Management Analyst II	1	1	1	F:ParaProfessional & Tech SEIU
RC1565:	Motor Pool Specialist	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>41.0</b>	<b>43.0 *</b>	<b>43.0 *</b>	
	<b>Temporary (FTE)</b>		<b>0.4 *</b>	<b>0.4 *</b>	
	<b>Position Total</b>	<b>41.0</b>	<b>43.4 *</b>	<b>43.4 *</b>	
<b>Budget Unit 8240000000 INFORMATION SYSTEMS DIV - ISF</b>					
HI1400:	Information Systems Director/Chief Information Officer	1	1	1	A:Executive Unrepresented
EI2400:	Information Systems Assistant Director	2	2	2	B:Senior Management Unrepresented
RI1011:	Department Information Systems Manager	1	1	1	C:Middle Management SJCMA
RM0226:	Management Analyst III	1	1	1	C:Middle Management SJCMA
RO3011:	Accounting Technician I	1	1	1	G:Office & Office Technical SEIU
RB6002:	Administrative Assistant II	2	1 *	1 *	F:ParaProfessional & Tech SEIU
- RB6205:	Business Analyst II		1 *	1 *	F:ParaProfessional & Tech SEIU
- RI1102:	Department Information Systems Analyst II	3	3	3	E:Professional SEIU
RI1104:	Department Information Systems Analyst IV	1	*	*	E:Professional SEIU
- RI1302:	Department Information Systems Specialist II	2	2	2	F:ParaProfessional & Tech SEIU
- RI1004:	Information Systems Analyst IV	56	62 *	62 *	E:Professional SEIU
RI1505:	Information Systems Analyst V	2	2	2	D:Confidential Unrepresented
RI1005:	Information Systems Analyst V	7	7	7	E:Professional SEIU
RI1510:	Information Systems Analyst V-Security Officer	1	1	1	E:Professional SEIU
RI1010:	Information Systems Manager	4	4	4	D:Confidential Unrepresented
- RI1322:	Information Systems Specialist II	2	2	2	F:ParaProfessional & Tech SEIU
RI1323:	Information Systems Specialist III	5	7 *	7 *	F:ParaProfessional & Tech SEIU
- RO6110:	Senior Office Assistant	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>92.0</b>	<b>99.0 *</b>	<b>99.0 *</b>	
	<b>Position Total</b>	<b>92.0</b>	<b>99.0 *</b>	<b>99.0 *</b>	
<b>Budget Unit 8260000000 CENTRAL TELEPHONE</b>					
RI1010:	Information Systems Manager	1	1	1	D:Confidential Unrepresented
- RI1004:	Information Systems Analyst IV	3	2 *	2 *	E:Professional SEIU
RI1323:	Information Systems Specialist III	3	1 *	1 *	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
	<b>Allocated Total</b>	<b>8.0</b>	<b>5.0 *</b>	<b>5.0 *</b>	
	<b>Position Total</b>	<b>8.0</b>	<b>5.0 *</b>	<b>5.0 *</b>	

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
<b>Budget Unit 921000000 SW ENTERPRISE FD-ROLLUP</b>					
EC2160:	Integrated Waste Manager	1	1	1	B:Senior Management Unrepresented
- RE1005:	Engineer V	1	1	1	C:Middle Management SJCA
RM0226:	Management Analyst III	2	2	2	C:Middle Management SJCA
RM0325:	Solid Waste Operations Manager	1	1	1	C:Middle Management SJCA
RC1007:	Solid Waste Site Manager	2	2	2	C:Middle Management SJCA
- RB4002:	Accountant II	1	1	1	F:ParaProfessional & Tech SEIU
RO3011:	Accounting Technician I	2	2	2	G:Office & Office Technical SEIU
- RB6002:	Administrative Assistant II	2	3 *	3 *	F:ParaProfessional & Tech SEIU
RO3000:	Cashier Clerk	8	8	8	G:Office & Office Technical SEIU
- RE1004:	Engineer IV	2	2	2	E:Professional SEIU
- RE0112:	Engineering Assistant II	1	1	1	F:ParaProfessional & Tech SEIU
RC1002:	Equipment Maintenance Foreman	1	1	1	R:Supervisors Unit SEIU
RC1005:	Equipment Operator Foreman	1	1	1	I:Trades, Labor, & Institutional SEIU
RC0651:	Equipment Operator I	3	3	3	I:Trades, Labor, & Institutional SEIU
RC0652:	Equipment Operator II	6	6	6	I:Trades, Labor, & Institutional SEIU
RC0603:	Equipment Service Worker III		1 *	1 *	I:Trades, Labor, & Institutional SEIU
- RC2024:	Fleet Parts Specialist		1 *	1 *	I:Trades, Labor, & Institutional SEIU
- RC3001:	Heavy Equipment Mechanic	4	4	4	I:Trades, Labor, & Institutional SEIU
RC0740:	Household Hazardous Waste Operations Coordinator	1	1	1	I:Trades, Labor, & Institutional SEIU
- RB6512:	Management Analyst II	3	3	3	F:ParaProfessional & Tech SEIU
RO6115:	Office Assistant Specialist	1	1	1	G:Office & Office Technical SEIU
RO1000:	Office Supervisor	3	3	3	R:Supervisors Unit SEIU
- RO6110:	Senior Office Assistant	2	2	2	G:Office & Office Technical SEIU
RC0715:	Senior Solid Waste Recovery Worker	13	13	13	I:Trades, Labor, & Institutional SEIU
RC1581:	Senior Transfer Truck Driver	1	1	1	R:Supervisors Unit SEIU
RC0720:	Solid Waste Recovery Supervisor	5	5	5	R:Supervisors Unit SEIU
RC0710:	Solid Waste Recovery Worker	18	20 *	20 *	I:Trades, Labor, & Institutional SEIU
RC1580:	Transfer Truck Driver	11	12 *	12 *	I:Trades, Labor, & Institutional SEIU
RC0420:	Welder		1 *	1 *	I:Trades, Labor, & Institutional SEIU
	<b>Allocated Total</b>	<b>96.0</b>	<b>103.0 *</b>	<b>103.0 *</b>	
	<b>Temporary (FTE)</b>	<b>9.1</b>	<b>9.6 *</b>	<b>9.6 *</b>	
	<b>Position Total</b>	<b>105.1</b>	<b>112.6 *</b>	<b>112.6 *</b>	
<b>Budget Unit 9221100000 SJ GENERAL HOSPITAL</b>					
EH3101:	Hospital Chief Executive Officer	1	1	1	A:Executive Unrepresented
EH3102:	Hospital Chief Financial Officer	1	1	1	A:Executive Unrepresented
EH3103:	Hospital Chief Nursing Officer	1	1	1	A:Executive Unrepresented
EB5000:	Deputy Director - Hospital HR	1	1	1	B:Senior Management Unrepresented
EH2105:	Deputy Director - SJGH Nursing	2	3 *	3 *	B:Senior Management Unrepresented
EH2150:	Deputy Director - Trauma	1	1	1	B:Senior Management Unrepresented
EH2106:	Deputy Director II-SJGH	2	1 *	1 *	B:Senior Management Unrepresented
EM0610:	Deputy Director-Case Management	1	1	1	B:Senior Management Unrepresented
EH2100:	Deputy Finance Director - HCS	2	2	2	B:Senior Management Unrepresented
EH2115:	Perioperative Services Director	1	1	1	B:Senior Management Unrepresented
EH8001:	Physician Manager	5	5	5	S:Physicians Management Unrepresented
RB3010:	Accounting Manager	1	1	1	C:Middle Management SJCA
RM0215:	Assistant Manager of Admitting	1	1	1	C:Middle Management SJCA
RM0204:	Assistant Manager of Patient Financial Services	1	1	1	C:Middle Management SJCA
RM0203:	Clinic Services Coordinator	2	2	2	C:Middle Management SJCA
RH0175:	Clinical Education Coordinator	1	1	1	C:Middle Management SJCA
RH8005:	Director of Clinical Dietetics	1	1	1	C:Middle Management SJCA
RM0350:	Facilities Manager - HCS	1	1	1	C:Middle Management SJCA
RH0131:	Health Information Administrator	1	1	1	C:Middle Management SJCA
RC2070:	Hospital Materials Manager	1	1	1	C:Middle Management SJCA
RH4330:	Hospital Pharmacy Manager	1	1	1	C:Middle Management SJCA
RM0226:	Management Analyst III	2	2	2	C:Middle Management SJCA
RH0320:	Manager of Administration & Utilization Review	1	1	1	C:Middle Management SJCA
RH5200:	Manager of Diagnostic Imaging	1	1	1	C:Middle Management SJCA
RF0204:	Manager of Laundry Services	1	1	1	C:Middle Management SJCA
RM0205:	Manager of Patient Financial Services	1	1	1	C:Middle Management SJCA
RH5360:	Manager of Respiratory Care	1	1	1	C:Middle Management SJCA
RM0860:	Manager of Sterile Processing Services	1	1	1	C:Middle Management SJCA
RH0100:	Medical Staff Coordinator	1	1	1	C:Middle Management SJCA
RH1320:	Nursing Department Manager - Ambulatory	1	1	1	C:Middle Management SJCA
RH1300:	Nursing Department Manager - Inpatient	10	10	10	C:Middle Management SJCA
RM0206:	Residency Training Program Manager	1	1	1	C:Middle Management SJCA
RP0405:	Security Manager	1	1	1	C:Middle Management SJCA
RH6510:	Therapy Services Manager	1	1	1	C:Middle Management SJCA

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
EH8002:Physician		57	60 *	60 *	P:Physicians UAPD
RB4003:Accountant III		3	3	3	F:ParaProfessional & Tech SEIU
RO3011:Accounting Technician I		3	3	3	G:Office & Office Technical SEIU
- RB6002:Administrative Assistant II		1	1	1	F:ParaProfessional & Tech SEIU
RO2050:Administrative Secretary		1	2 *	2 *	G:Office & Office Technical SEIU
RH4080:Assistant Clinical Lab Operations Manager		1	1	1	R:Supervisors Unit SEIU
RC1013:Assistant Facilities Manager - HCS		1	1	1	R:Supervisors Unit SEIU
RF0302:Assistant Manager Housekeeping Services		1	1	1	R:Supervisors Unit SEIU
RH0130:Assistant Medical Records Administrator		1	1	1	R:Supervisors Unit SEIU
RH6490:Audiologist		1	2 *	2 *	E:Professional SEIU
RF0130:Baker		1	1	1	I:Trades, Labor, & Institutional SEIU
- RH0753:Biomedical Equipment Technician III		4	4	4	R:Supervisors Unit SEIU
- RB6205:Business Analyst II		10	9 *	9 *	F:ParaProfessional & Tech SEIU
RH2050:Cardiac Monitor Technician		9	9	9	F:ParaProfessional & Tech SEIU
RC4000:Central Plant Engineer		5	5	5	I:Trades, Labor, & Institutional SEIU
RB6120:Charge Description Master Analyst		1	1	1	F:ParaProfessional & Tech SEIU
MH7453:Chief Resident - Department of Family Prac-Ped		1	1	1	E:Professional SEIU
MH7456:Chief Resident - Department of Surgery		1	1	1	E:Professional SEIU
MH7452:Chief Resident - Internal Medicine		1	1	1	E:Professional SEIU
- RH8002:Clinical Dietitian II		6	6	6	E:Professional SEIU
- RH4002:Clinical Lab Scientist II		17	17	17	E:Professional SEIU
RH4003:Clinical Lab Scientist III		6	6	6	R:Supervisors Unit SEIU
RH1150:Clinical Nurse Specialist		1	1	1	M:Registered Nurses CNA
- RS3042:Clinical Social Worker II		8	10 *	10 *	E:Professional SEIU
RS3043:Clinical Social Worker III		1	1	1	R:Supervisors Unit SEIU
- RC0403:Crafts Worker III		9	9	9	I:Trades, Labor, & Institutional SEIU
RC0404:Crafts Worker IV		1	1	1	R:Supervisors Unit SEIU
RO4130:Credentialing Specialist		2	2	2	G:Office & Office Technical SEIU
RC1500:Delivery Driver		1	1	1	I:Trades, Labor, & Institutional SEIU
- RI1202:Department Applications Analyst II		2	2	2	E:Professional SEIU
RI1203:Department Applications Analyst III		1	1	1	E:Professional SEIU
RI1204:Department Applications Analyst IV		4	4	4	E:Professional SEIU
RI1103:Department Information Systems Analyst III		1	1	1	E:Professional SEIU
RI1104:Department Information Systems Analyst IV		4	3 *	3 *	E:Professional SEIU
- RI1302:Department Information Systems Specialist II		5	5	5	F:ParaProfessional & Tech SEIU
RI1303:Department Information Systems Specialist III		2	2	2	F:ParaProfessional & Tech SEIU
RO6120:Department Payroll Specialist		3	3	3	G:Office & Office Technical SEIU
RB5500:Departmental Personnel Analyst		3	3	3	D:Confidential Unrepresented
RH2060:Dialysis Patient Care Technician		18	18	18	F:ParaProfessional & Tech SEIU
RH5010:Echocardiographic Technician		2	2	2	F:ParaProfessional & Tech SEIU
RC0410:Electrician		2	2	2	I:Trades, Labor, & Institutional SEIU
RO2060:Executive Secretary		1	1	1	G:Office & Office Technical SEIU
RF0110:Food Service Assistant Director		1	1	1	R:Supervisors Unit SEIU
RF0105:Food Service Supervisor		3	3	3	R:Supervisors Unit SEIU
- RF0103:Food Service Worker III		21	29 *	29 *	I:Trades, Labor, & Institutional SEIU
RH0705:Hospital Attendant		15	15	15	F:ParaProfessional & Tech SEIU
- RC5011:Hospital Telephone Operator II		6	6	6	G:Office & Office Technical SEIU
RH0201:Hospital Unit Clerk		28	32 *	32 *	G:Office & Office Technical SEIU
RF0300:Housekeeping Service Worker		42	51 *	51 *	I:Trades, Labor, & Institutional SEIU
RH1235:Infection Control Coordinator		1	1	1	M:Registered Nurses CNA
RH4901:Laboratory Assistant I		9	9	9	F:ParaProfessional & Tech SEIU
RH4902:Laboratory Assistant II		9	9	9	F:ParaProfessional & Tech SEIU
RH4903:Laboratory Assistant Supervisor		1	1	1	R:Supervisors Unit SEIU
RF0201:Laundry Worker		5	7 *	7 *	I:Trades, Labor, & Institutional SEIU
RF0301:Lead Housekeeper		3	3	3	R:Supervisors Unit SEIU
RF0203:Lead Laundry Worker		1	1	1	R:Supervisors Unit SEIU
RH0301:Lead Patient Services Representative		1	1	1	F:ParaProfessional & Tech SEIU
- RB6512:Management Analyst II		1	1	1	F:ParaProfessional & Tech SEIU
RO4212:Medical Coder - Certified		12	12	12	F:ParaProfessional & Tech SEIU
RH4010:Medical Laboratory Technician			1 *	1 *	F:ParaProfessional & Tech SEIU
RH0120:Medical Librarian		1	1	1	F:ParaProfessional & Tech SEIU
- RO4202:Medical Records Technician II		4	4	4	G:Office & Office Technical SEIU
RH4930:Medical Technician		1	1	1	F:ParaProfessional & Tech SEIU
RH5103:Nuclear Medicine Specialist III		1	1	1	F:ParaProfessional & Tech SEIU
RH1170:Nurse Midwife		5	6 *	6 *	M:Registered Nurses CNA
RH3001:Nursing Assistant		41	48 *	48 *	F:ParaProfessional & Tech SEIU
- RH6005:Occupational Therapist IV - Assistant Department Manager		3	3	3	R:Supervisors Unit SEIU
RO6115:Office Assistant Specialist		22	22	22	G:Office & Office Technical SEIU
RC4001:Office Building Engineer		2	2	2	I:Trades, Labor, & Institutional SEIU

# COUNTY OF SAN JOAQUIN

## POSITION BUDGET DETAIL FISCAL YEAR 2023-2024

JOB CODE	POSITION TITLE	ALLOCATED JUNE 2023	REQUESTED 2023-2024	ADOPTED 2023-2024	REPRESENTATION UNIT
RO2000:Office Secretary		3	3	3	G:Office & Office Technical SEIU
RO1000:Office Supervisor		7	7	7	R:Supervisors Unit SEIU
RO6700:Office Technician/Coordinator		9	8 *	8 *	G:Office & Office Technical SEIU
- RH3031:Operating Room Technician II		14	14	14	F:ParaProfessional & Tech SEIU
RH3040:Orthopedic Technician		1	1	1	F:ParaProfessional & Tech SEIU
RH3200:Outpatient Clinic Assistant		40	41 *	41 *	F:ParaProfessional & Tech SEIU
RC0800:Park Worker		3	3	3	I:Trades, Labor, & Institutional SEIU
RO1010:Patient Financial Services Supervisor		3	3	3	R:Supervisors Unit SEIU
RH0200:Patient Registration Clerk		28	28	28	G:Office & Office Technical SEIU
RH0300:Patient Services Representative		11	11	11	F:ParaProfessional & Tech SEIU
RH4410:Pharmaceutical Inventory Technician		1	1	1	F:ParaProfessional & Tech SEIU
- RH4350:Pharmacist - Clinical		16	16	16	E:Professional SEIU
RH4331:Pharmacy Supervisor		2	2	2	R:Supervisors Unit SEIU
- RH4452:Pharmacy Technician II		2	2	2	F:ParaProfessional & Tech SEIU
RH4453:Pharmacy Technician III		10	10	10	F:ParaProfessional & Tech SEIU
- RH6205:Physical Therapist IV - Assistant Department Manager		10	11 *	11 *	R:Supervisors Unit SEIU
RO4900:Purchasing Technician		3	3	3	G:Office & Office Technical SEIU
RH1240:Quality Improvement Coordinator		1	1	1	M:Registered Nurses CNA
RH5185:Radiologic Technologist Educational Coordinator		1	1	1	F:ParaProfessional & Tech SEIU
- RH5003:Radiologic Technologist III - Mammography		26	26	26	F:ParaProfessional & Tech SEIU
RH5180:Radiologic Technologist Instructor		1	1	1	F:ParaProfessional & Tech SEIU
RH2075:Renal Dialysis Procedures Tech		2	2	2	F:ParaProfessional & Tech SEIU
- RO1141:Residency Training Program Tech II		3	3	3	G:Office & Office Technical SEIU
- MH7420:Resident Physician 4th Yr		67	72 *	72 *	E:Professional SEIU
- RH5353:Respiratory Care Practitioner II		28	29 *	29 *	F:ParaProfessional & Tech SEIU
RH5352:Respiratory Care Practitioner Supervisor		3	3	3	R:Supervisors Unit SEIU
- RO4603:Senior Collections Clerk		2	2	2	G:Office & Office Technical SEIU
- RH2002:Senior Licensed Vocational Nurse		13	13	13	F:ParaProfessional & Tech SEIU
- RH1163:Senior Nurse Practitioner - Inpatient		15	16 *	16 *	M:Registered Nurses CNA
- RO6110:Senior Office Assistant		62	64 *	64 *	G:Office & Office Technical SEIU
RH3032:Senior Operating Room Technician		6	6	6	F:ParaProfessional & Tech SEIU
RH2010:Special Care Clinic Supervisor		1	1	1	R:Supervisors Unit SEIU
RC5003:Special Systems Technician		2	2	2	I:Trades, Labor, & Institutional SEIU
RH6405:Speech Therapist IV - Assistant Department Manager		1	1	1	R:Supervisors Unit SEIU
- RH6404:Speech Therapist IV - Clinical Specialist		3	3	3	E:Professional SEIU
- RH1106:Staff Nurse V - Assistant Nursing Department Manager-Inpatient		443	444 *	444 *	M:Registered Nurses CNA
RH0853:Sterile Processing Tech Supervisor		2	2	2	R:Supervisors Unit SEIU
- RH0852:Sterile Processing Technician II		13	13	13	I:Trades, Labor, & Institutional SEIU
RC2001:Stock Clerk II		2	2	2	I:Trades, Labor, & Institutional SEIU
RC2011:Storekeeper I		5	5	5	I:Trades, Labor, & Institutional SEIU
RC2012:Storekeeper II		1	1	1	R:Supervisors Unit SEIU
RH5005:Supervising Radiologic Technologist		2	2	2	R:Supervisors Unit SEIU
RH0820:Supply Distribution Technician		6	6	6	I:Trades, Labor, & Institutional SEIU
RH0180:Surgery Resource Specialist		2	2	2	G:Office & Office Technical SEIU
- RH0240:Trauma Registrar II		4	6 *	6 *	G:Office & Office Technical SEIU
- RH5154:Ultrasound Specialist IV		6	6	6	F:ParaProfessional & Tech SEIU
Allocated Total		1,380.0	1,430.0 *	1,430.0 *	
Temporary (FTE)		422.4	341.2 *	341.2 *	
Position Total		1,802.4	1,771.2 *	1,771.2 *	
Budget Unit 9230901000 AIRPORT ENTERPRISE					
EB1305:Airport Director		1	1	1	A:Executive Unrepresented
EB1315:Airport Deputy Director		1	1	1	B:Senior Management Unrepresented
RB4003:Accountant III		1	1	1	F:ParaProfessional & Tech SEIU
- RB6002:Administrative Assistant II		1	1	1	F:ParaProfessional & Tech SEIU
RP0510:Airport Operations Supervisor		1	1	1	R:Supervisors Unit SEIU
RP0500:Airport Operations Specialist		4	4	4	I:Trades, Labor, & Institutional SEIU
RP0495:Airport Operations Worker		1	1	1	I:Trades, Labor, & Institutional SEIU
- RC0402:Crafts Worker II		1	1	1	I:Trades, Labor, & Institutional SEIU
RC0403:Crafts Worker III		3	3	3	I:Trades, Labor, & Institutional SEIU
RC0404:Crafts Worker IV		1	1	1	R:Supervisors Unit SEIU
RO6115:Office Assistant Specialist		1	1	1	G:Office & Office Technical SEIU
Allocated Total		16.0	16.0	16.0	
Position Total		16.0	16.0	16.0	
Allocated Total		7,138.0	7,313.0 *	7,313.0 *	
Temporary (FTE)		828.4	733.7 *	733.7 *	
Position Total		7,966.4	8,046.7 *	8,046.7 *	



ADOPTED BUDGET

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*Capital Assets Budget Detail*

**COUNTY OF SAN JOAQUIN**  
**CAPITAL ASSETS BUDGET DETAIL**  
**FISCAL YEAR 2023-2024**

<b>BUDGET UNIT</b>		<b>REQUESTED</b>		<b>ADOPTED</b>	
Description of Equipment/Structures & Improvements		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
<b>1011200000: PURCHASING &amp; SUPPORT SERVICES</b>					
6451000000	Shredder	1	\$50,000	1	\$50,000
	Total		\$50,000		\$50,000
<b>1013000000: REGISTRAR OF VOTERS</b>					
6451000000	Voting System & Associated Hardware/Software	1	\$5,588,937	1	\$5,588,937
	Total		\$5,588,937		\$5,588,937
<b>1014300000: CAPITAL PROJECT ADMIN</b>					
6451000800	Utility Vehicle	1	\$50,000	1	\$50,000
	Total		\$50,000		\$50,000
<b>1040148000: PUBLIC IMPROVEMENT</b>					
6411021220	ADA Building Upgrades	1	\$150,000	1	\$150,000
6411022110	Capital Projects Contingency	1	1,430,500	1	1,430,500
6411022700	Capital Projects Planning & Development	1	300,000	1	300,000
6411022960	New Morgue	1	18,155,181	1	18,155,181
6411023160	Countywide Security Improvements	1	1,100,000	1	1,100,000
6411023580	County Detention & Program Facility	1	37,008,638	1	37,008,638
6411024000	Facility Flooring Replacements	1	415,000	1	415,000
6411024010	Facility Parking Lot Repairs	1	3,185,000	1	3,185,000
6411031170	Building Emergency Repairs	1	500,000	1	500,000
6411032005	BHS Modular Building	1	1,000,000	1	1,000,000
6411032115	Countywide Space Planning	1	800,000	1	800,000
6411032200	6 S. El Dorado St Improvements and Renovations	1	19,585,333	1	19,585,333
6411032205	Emergency Medical Services Facility	1	9,830,613	1	9,830,613
6411032210	Sheriff Classroom Building	1	2,846,200	1	2,846,200
6411032215	Sheriff Evidence Building	1	7,041,100	1	7,041,100
6411032220	Sheriff Training Facility	1	17,597,800	1	17,597,800
6411032225	South County Park Planning	1	341,970	1	341,970
6411032230	BHS Roof and Siding Replacement	1	4,670,000	1	4,670,000
6411032240	Countywide Roof Replacement	1	3,210,000	1	3,210,000
6411032245	Honor Farm Laundry HVAC Replacement	1	750,000	1	750,000
6411032250:	Jail Digital HVAC Controller Replacement	1	1,085,000	1	1,085,000
6411032260	Juvenile Hall HVAC Chiller Replacement	1	225,000	1	225,000
6411032270	Parks Improvements	1	3,290,000	1	3,290,000
6411032275	Parks Strategic Plan	1	765,000	1	765,000
6411032280	Property Assessment	1	500,000	1	500,000
6411032300	Thornton Radio Tower	1	300,000	1	300,000
6411032305	Honor Farm Kitchen Upgrades	1	145,000	1	145,000
6411032310	Honor Farm Restroom Enlargement	1	395,000	1	395,000
6411032315	Oak Grove Regional Park Building Improvements	1	750,000	1	750,000
6411056680	Underground Fuel Tanks	1	375,000	1	375,000
	Total		\$137,747,335		\$137,747,335
<b>2020200000: DISTRICT ATTORNEY</b>					
6451000800	Vehicles	3	\$166,200	3	\$166,200
	Total		\$166,200		\$166,200
<b>2021200000: PRETRIAL SERVICES</b>					
6411095600	Carpet Replacement	1	\$50,000	1	\$50,000
6451002300	System Furniture	1	100,000	1	100,000
6451660285	Kiosk Reporting System	2	40,000	2	40,000
	Total		\$190,000		\$190,000
<b>2021609000: SHERIFF-CAL MMET</b>					
6451000800	Air Fuel Trailer	1	\$38,186	1	\$38,186
	Total		\$38,186		\$38,186

**COUNTY OF SAN JOAQUIN**  
**CAPITAL ASSETS BUDGET DETAIL**  
**FISCAL YEAR 2023-2024**

<b>BUDGET UNIT</b>		<b>REQUESTED</b>		<b>ADOPTED</b>	
Description of Equipment/Structures & Improvements		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
<b>2021610000: SHERIFF-AUTOMATED FINGERPRINT</b>					
6453000000	Automation Equipment	1	\$750,000	1	\$750,000
	Total		\$750,000		\$750,000
<b>2021614000: SHERIFF-SPECIAL SERVICES DIVISION</b>					
6451000800	Vehicles	4	\$324,000	4	\$324,000
6451000800	Surveillance Trailer	1	40,000	1	40,000
	Total		\$364,000		\$364,000
<b>2021615000: SHERIFF-MOUNTAIN HOUSE</b>					
6451000800	Motor Trailer	1	\$40,650	1	\$40,650
	Total		\$40,650		\$40,650
<b>2021616000: SHERIFF-PORT SECURITY GRANT</b>					
6451000000	Boat	1	\$525,000	1	\$525,000
	Total		\$525,000		\$525,000
<b>2021620000: SHERIFF-PATROL</b>					
6451000800	Mounted Patrol Unit Trailer	1	\$85,550	1	\$85,550
6451000800	Mounted Patrol Unit Truck	1	70,650	1	70,650
	Total		\$156,200		\$156,200
<b>2021626000: SHERIFF-DETECTIVES</b>					
6411000000	Office Renovations	1	\$17,783	1	\$17,783
6411000000	1st Floor Interview Rooms	1	16,325	1	16,325
6411000000	2nd Floor Interview Rooms	1	6,513	1	6,513
6451000800	Vehicles	6	216,000	6	216,000
6452000000	Mobile Radio	6	59,100	6	59,100
6452000000	Portable Radio	6	41,400	6	41,400
	Total		\$357,121		\$357,121
<b>2021635000: SHERIFF-CIVIL</b>					
6451000800	Vehicle	1	\$65,648	1	\$65,648
	Total		\$65,648		\$65,648
<b>2021645000: SHERIFF-ADMIN SUPPORT SERVICES</b>					
6411000000	Range Roof	1	\$500,000	1	\$500,000
6411000000	Range Moving Target	1	287,000	1	287,000
6451000800	BGI Vehicle	1	70,000	1	70,000
6451000800	PIS Vehicle	1	42,500	1	42,500
6451000800	BGI Vehicle	1	40,000	1	40,000
	Total		\$939,500		\$939,500
<b>2021649000: SHERIFF-INFORMATION SYSTEMS</b>					
6453000000	CAD/RMS Upgrade	1	\$444,300	1	\$444,300
	Total		\$444,300		\$444,300
<b>2021655000: SHERIFF-PATROL-SLESF-AB109</b>					
6451000000	X-ray Panels	2	\$88,576	2	\$88,576
6451000000	Drone Systems	4	63,776	4	63,776
	Total		\$152,352		\$152,352
<b>2022621000: CORRECTIONAL HEALTH SERVICES</b>					
6451000000	EKG Machines	2	\$13,750	2	\$13,750
6453000000	Network Switches	11	112,750	11	112,750
6453000000	VPN Router	1	15,000	1	15,000
6453300300	Electronic Health Record System	1	975,000	1	975,000
	Total		\$1,116,500		\$1,116,500



**COUNTY OF SAN JOAQUIN**  
**CAPITAL ASSETS BUDGET DETAIL**  
**FISCAL YEAR 2023-2024**

	<b>BUDGET UNIT</b> Description of Equipment/Structures & Improvements	<b>REQUESTED</b>		<b>ADOPTED</b>	
		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
	<b>2022700000: PROBATION-JUVENILE</b>				
6411022790	Carpet Replacement	1	\$100,000	1	\$100,000
6451000800	Vehicle	1	80,000	1	80,000
	Total		\$180,000		\$180,000
	<b>2022702000: PROBATION-ADULT</b>				
6451002300	System Furniture	30	\$342,400	30	\$342,400
	Total		\$342,400		\$342,400
	<b>2022800000: PROBATION-JUVENILE DETENTION</b>				
6411021655	Security Fencing	1	\$50,000	1	\$50,000
6411023065	Landscaping at Camp Peterson	1	25,000	1	25,000
6411023075	Landscaping at Dream Center	1	25,000	1	25,000
6411024045	Juvenile Hall Flooring Replacement	1	250,000	1	250,000
6411024055	Gym Flooring Replacement	1	250,000	1	250,000
6451000800	Vehicle	1	75,000	1	75,000
6451660200	Juvenile Hall Contraband Detection	1	200,000	1	200,000
6453330260	Surveillance System	1	300,000	1	300,000
	Total		\$1,175,000		\$1,175,000
	<b>2024700000: AGRICULTURAL COMMISSIONER</b>				
6411000000	Robert J. Cabral Agricultural Center Landscape Design	1	\$200,000	1	\$200,000
6451000800	Vehicles	2	120,000	2	120,000
	Total		\$320,000		\$320,000
	<b>2026000000: EMERGENCY SERVICES</b>				
6451000000	Shower Trailer	1	\$150,000	1	\$150,000
6451000800	Utility Task Vehicle	1	50,000	1	50,000
	Total		\$200,000		\$200,000
	<b>2026000150: EMERGENCY SVS-GRANTS</b>				
6451000000	Cybersecurity Upgrade for Public Health Services	1	\$218,451	1	\$218,451
6451000000	Automated License Plate Reader for Stockton Police Department	1	153,050	1	153,050
6451000000	Automated License Plate Reader for Stockton Police Department	1	146,180	1	146,180
6451000000	Bomb Squad X-Ray Machine for the Sheriff's Office	1	57,110	1	57,110
6451000000	Cybersecurity Equipment	1	18,320	1	18,320
6451000000	Emergency Alert System Encoder/Decoder - Emergency Ops Ctr	1	9,440	1	9,440
6451000000	Crime Analysis LCD Monitor for the Sheriff's Office	1	5,076	1	5,076
6451000800	Crisis Response Van for the Sheriff's Office	1	196,865	1	196,865
6451000800	Truck and Trailer for the Sheriff's Animal Services Unit	1	132,150	1	132,150
6451000800	Bomb Squad Truck for the Sheriff's Office	1	73,227	1	73,227
6452000000	Two-Way Radios for San Joaquin Delta College Police	1	62,623	1	62,623
	Total		\$1,072,492		\$1,072,492
	<b>3030105000: PUBLIC WORKS-ROAD MAINTENANCE</b>				
6451000000	Portable Generator - Trailer Mounted	4	\$145,000	4	\$145,000
6451000000	6" Water Pump - Trailer Mounted	2	110,000	2	110,000
6451000000	Hoses and Tools for Water Pumps	4	90,000	4	90,000
6451000000	4" Water Pump	2	80,000	2	80,000
6451000000	8" Pump - Trailer Mounted	1	75,000	1	75,000
6453000000	Replacement Sign Printer for Traffic Maint	1	60,000	1	60,000
6453000000	Upgrade to Wireless Displays in General Assembly	1	15,000	1	15,000
	Total		\$575,000		\$575,000

**COUNTY OF SAN JOAQUIN**  
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<b>BUDGET UNIT</b>		<b>REQUESTED</b>		<b>ADOPTED</b>	
Description of Equipment/Structures & Improvements		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
<b>4040500000: MENTAL HEALTH SERVICES</b>					
6411000000	BHS Administration Modular Furniture	1	\$632,700	1	\$632,700
6411000000	Carpet - Community Adult Treatment Services & Older Adult Services	1	184,000	1	184,000
6411000000	Office Remodel - Finance	1	135,000	1	135,000
6411000000	Conference Room Reconfiguration	1	100,000	1	100,000
6411000000	Flooring - Forensic	1	75,000	1	75,000
6411000000	Interior Repaint - Children/Youth Services Clinic and Offices	1	60,000	1	60,000
6411000000	Facility Concrete/Flatwork	1	60,000	1	60,000
6411000000	Exterior Lighting LED Upgrade	1	60,000	1	60,000
6411000000	Fencing Enclosure/Repair	1	60,000	1	60,000
6411000000	Flooring - Finance	1	52,000	1	52,000
6411000000	PHF Administration Office Space Redesign	1	50,000	1	50,000
6411000000	Rolling Gate	1	45,000	1	45,000
6411000000	Flooring - Administration	1	43,000	1	43,000
6411000000	PHF Crisis Stabilization Unit Patio Redesign	1	30,000	1	30,000
6411000000	PHF Crisis Stabilization Unit Window/Space Redesign	1	22,250	1	22,250
6411000000	PHF Kitchen Redesign	1	20,000	1	20,000
6451000000	Transit Vans	4	207,214	4	207,214
6451000000	Vans	4	200,000	4	200,000
6451000000	Sedans	4	160,000	4	160,000
6451000000	Server Hardware	1	96,000	1	96,000
6451000000	Transit Vans Uplift Configuration	4	64,631	4	64,631
6451000000	Vehicles	2	60,000	2	60,000
6451000000	Electronic Whiteboards	2	40,000	2	40,000
6451000000	HVAC Repairs	1	40,000	1	40,000
6451000000	Heat Pump Replacement	1	30,000	1	30,000
6451000000	Water Heater	1	20,000	1	20,000
Total			\$2,546,795		\$2,546,795
<b>4040600000: SUBSTANCE USE DISORDER SERVICES</b>					
6411000000	Playground Sidewalk Project	1	\$60,000	1	\$60,000
6411000000	Recreational Facility Concrete	1	60,000	1	60,000
6411000000	Residential Program Lobby Remodel	1	60,000	1	60,000
6411000000	Painting	1	34,460	1	34,460
6451000000	Stove and Hood Replacement	1	75,000	1	75,000
6451000000	Commercial Fridge/Freezer Replacements	5	38,500	5	38,500
6451000000	Shed	1	5,000	1	5,000
6451000800	Vehicles	2	60,000	2	60,000
Total			\$392,960		\$392,960
<b>4040700000: BEHAVIORAL HEALTH ADMIN</b>					
6411000000	Water Heater, Central Plant	1	\$60,000	1	\$60,000
6411000000	HVAC Repairs	1	40,000	1	40,000
6411000000	Heat Pump Replacement	1	30,000	1	30,000
6411028880	Workspace Remodels	2	20,000	2	20,000
6453000000	Network Equipment	1	200,000	1	200,000
6453000000	UPS System	1	199,000	1	199,000
Total			\$549,000		\$549,000
<b>4040800000: UTILITY DISTRICTS</b>					
6451000000	Six-Inch Diesel Pump	1	\$30,000	1	\$30,000
6451000000	Box Trailer	1	10,000	1	10,000
6451000000	Flat Bed Trailer	1	10,000	1	10,000
6453000000	Data Collection and Work Order Management System	1	10,000	1	10,000
Total			\$60,000		\$60,000

**COUNTY OF SAN JOAQUIN**  
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<b>BUDGET UNIT</b>		<b>REQUESTED</b>		<b>ADOPTED</b>	
Description of Equipment/Structures & Improvements		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
<b>4041000000: PUBLIC HEALTH SVS</b>					
6451000000	Droplet Digital PCR	1	\$425,000	1	\$425,000
6451000000	Mobile Clinic	1	350,000	1	350,000
6451000000	Automated Liquid Handler	1	125,000	1	125,000
6451000000	Generator Fuel Tank, Scrubber, and Transfer Pump	1	100,000	1	100,000
6451000000	Lab Water System Upgrade	1	50,000	1	50,000
6451000000	Fluorescence Microscope	1	25,000	1	25,000
6451000000	Water Jacket CO2 Incubator	1	10,000	1	10,000
6451000000	PCR Workstation Expansion	1	7,500	1	7,500
6453000000	Network Storage Upgrade	1	360,000	1	360,000
6453000000	Network Switch Replacements	4	100,000	4	100,000
6453000000	Data Warehouse Servers	2	100,000	2	100,000
6453000000	Network Servers	2	80,000	2	80,000
6453000000	Network Testing Tool	1	20,000	1	20,000
Total			\$1,752,500		\$1,752,500
<b>4041200000: CONSERVATOR SERVICES</b>					
6411000000	Flooring	1	\$40,000	1	\$40,000
6451000000	Workspace Remodel	1	225,000	1	225,000
Total			\$265,000		\$265,000
<b>4041800000: EMERGENCY MEDICAL SERVICE AGCY</b>					
6451000000	Sport Utility Vehicle	1	\$70,500	1	\$70,500
Total			\$70,500		\$70,500
<b>4049700000: OFFICE OF THE MEDICAL EXAMINER</b>					
6451000800	Compact SUV	1	\$50,000	1	\$50,000
6453000000	Software	1	100,000	1	100,000
Total			\$150,000		\$150,000
<b>5050101000: HUMAN SERVICES-ADMIN</b>					
6411001260	Supply and Return Fan Project	1	\$750,000	1	\$750,000
6411022510	Roof Replacement	1	1,500,000	1	1,500,000
6411022510	South Lobby Remodel	1	1,200,000	1	1,200,000
6411022510	Door Replacements	1	130,000	1	130,000
6411022510	General Building Maintenance	1	50,000	1	50,000
6451000000	Diesel Tank	1	25,000	1	25,000
6451000000	Print Shop Equipment	1	20,000	1	20,000
6451001100	Cubicle Reconfigurations	495	2,970,000	495	2,970,000
6453300100	Key Card Upgrade	1	1,250,000	1	1,250,000
6453300100	LED Training Room Projectors	5	50,000	5	50,000
6453300200	Printer Replacements	4	31,000	4	31,000
6453300600	Network Equipment	1	430,000	1	430,000
6453300600	Blades	1	90,000	1	90,000
6453300600	SAN Storage	1	45,000	1	45,000
Total			\$8,541,000		\$8,541,000
<b>5053900000: MARY GRAHAM CHILDRENS SHELTER</b>					
6411000000	Fence	1	\$750,000	1	\$750,000
6411000000	Keycard System	1	500,000	1	500,000
6411000000	General Maintenance	1	75,000	1	75,000
6451000000	Heater Replacements	1	100,000	1	100,000
6451001100	Workstations	20	120,000	20	120,000
Total			\$1,545,000		\$1,545,000
<b>5054101000: DEPT OF AGING-COMMUNITY SVS</b>					
6451000800	Midsize SUV	1	\$60,000	1	\$60,000
Total			\$60,000		\$60,000

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	<b>BUDGET UNIT</b> Description of Equipment/Structures & Improvements	<b>REQUESTED</b>		<b>ADOPTED</b>	
		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
	<b>5055103000: EMPLOY ECONOMIC DEVELOP DEPT</b>				
6453000000	Palo Alto Firewall Equipment Upgrade	1	\$90,000	1	\$90,000
	Total		\$90,000		\$90,000
	<b>5055246000: NEIGHBORHOOD PRESERVATION</b>				
6411021231	Implementation-South Stockton Sidewalks Project	1	\$12,882	1	\$12,882
6411024370	South Stockton Sidewalks Project	1	300,000	1	300,000
	Total		\$312,882		\$312,882
	<b>7070300000: PARKS AND RECREATION</b>				
6451000000	Wood Chipper	1	\$67,500	1	\$67,500
6451000000	Pro-Pactor Trash Compacting Trailer	1	47,500	1	47,500
6451000000	Rodent Control Machine	1	18,000	1	18,000
	Total		\$133,000		\$133,000
	<b>8190000000: FLEET SERVICES</b>				
6451000000	Truck Lift, Portable	1	\$75,000	1	\$75,000
6451000000	Tire Changer	1	20,000	1	20,000
6451000000	Wheel Balancer	1	15,000	1	15,000
6451000800	Replacement Vehicles	89	5,376,000	89	5,376,000
	Total		\$5,486,000		\$5,486,000
	<b>8240000000: INFORMATION SYSTEMS DIV - ISF</b>				
6451000000	Enterprise Access Control Project	1	\$2,500,000	1	\$2,500,000
6451000000	Disaster Recovery Infrastructure Upgrade	1	850,000	1	850,000
6451000000	Robotic Process Automation	1	250,000	1	250,000
6451000000	Infrastructure Upgrades	1	162,000	1	162,000
	Total		\$3,762,000		\$3,762,000
	<b>8250000000: OFFICE AUTOMATION</b>				
6451000000	Cisco UCS Cluster	1	\$442,812	1	\$442,812
6451000000	Brocade Storage Switches	1	120,000	1	120,000
6451000000	Audio-Visual Equipment	1	110,000	1	110,000
	Total		\$672,812		\$672,812
	<b>8260000000: CENTRAL TELEPHONE</b>				
6451000000	Network Switch Refresh	1	\$675,000	1	\$675,000
6451000000	Firewall Refresh	1	285,000	1	285,000
	Total		\$960,000		\$960,000
	<b>8270000000: RADIO COMMUNICATIONS</b>				
6411000000	Thornton Radio Shelter Replacement	1	\$300,000	1	\$300,000
6411000000	Mt. Oso Radio Shelter Replacement	1	250,000	1	250,000
6452000000	Sheriff's Custody and Hospital Radio Equipment	1	2,500,000	1	2,500,000
6452000000	Local Government and Interoperable Radio Equipment	1	1,000,000	1	1,000,000
	Total		\$4,050,000		\$4,050,000
	<b>9210000000: SW ENTERPRISE FD-ROLLUP</b>				
6411000000	Rehabilitate/Replace Flare Station - North County	1	\$320,000	1	\$320,000
6411000000	New Landfill Gas Wells - North County Landfill	6	240,000	6	240,000
6411000000	Rehabilitate/Replace Monitoring Wells - Harney Lane	1	200,000	1	200,000
6411000000	Landfill Gas Collection System Improvements - Foothill	1	200,000	1	200,000
6411000000	Rehabilitate/Replace Flare Station - Corral Hollow	1	200,000	1	200,000
6411000000	Refurbish Current 70' Scale	1	135,000	1	135,000
6411000000	Rehabilitate/Replace Flare Station - Harney Lane	1	100,000	1	100,000
6411000000	Horizontal Landfill Gas Collection - Foothill	1	100,000	1	100,000
6411000000	New Landfill Gas Wells - Foothill	2	100,000	2	100,000
6411000000	Horizontal Landfill Gas Collection - North County	1	100,000	1	100,000
6411000000	Self Contained Storm Water Pump for SW Basin	1	100,000	1	100,000

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	<b>BUDGET UNIT</b> Description of Equipment/Structures & Improvements	<b>REQUESTED</b>		<b>ADOPTED</b>	
		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
6411000000	Organics Pad Improvements - North County	1	100,000	1	100,000
6411000000	Roll Up Doors	4	92,000	4	92,000
6411000000	Exhaust Fans Replacement	3	90,000	3	90,000
6411000000	Rehabilitate/Replace Monitoring Well g-5b - North County Landfill	1	80,000	1	80,000
6411000000	Landfill Gas Collection System Improvements - North County	1	60,000	1	60,000
6411000000	Commercial Lance Scalebooth - Lovelace	1	30,000	1	30,000
6451000000	Rover Fire Suppression System	1	460,000	1	460,000
6451000000	Refuse Transfer Trailers	2	220,000	2	220,000
6451000000	Transfer Demo Trailer	1	100,000	1	100,000
6451000000	Forklift 4 Ton Capacity	1	80,000	1	80,000
6451000000	Flare Station Components/Collection System Equip - North County	3	75,000	3	75,000
6451000000	LED Monitor Screen - Lovelace	1	70,000	1	70,000
6451000000	Diesel Automated Storm Water Pump	1	60,000	1	60,000
6451000000	Flare Station Components/Collection System Equip - Harney Lane	3	50,001	3	50,001
6451000000	Flare Station Components/Collection System Equip Corral Hollow	3	50,001	3	50,001
6451000000	Camera and DVR System	1	50,000	1	50,000
6451000000	Roll Off Bins	4	40,000	4	40,000
6451000000	Landfill Tarps	3	36,000	3	36,000
6451000000	Flare Station Components/Collection System Equipment-Foothill	2	25,000	2	25,000
6451007633	Oil Collection Center	1	20,000	1	20,000
	Total		\$3,583,002		\$3,583,002
<b>9221100000: S J GENERAL HOSPITAL</b>					
6411000000	Sterile Processing Department Renovation	1	\$2,000,000	1	\$2,000,000
6411000000	Observation Unit	1	1,500,000	1	1,500,000
6411000000	Catheterization Equipment Replacement Construction	1	1,000,000	1	1,000,000
6411000000	Emergency Department Expansion	1	1,000,000	1	1,000,000
6411000000	Clinical Lab Automation and Robotic Line Upgrade	1	525,000	1	525,000
6411000000	Time Clock Project	1	220,000	1	220,000
6451000000	Capital Contingency	1	1,115,134	1	1,115,134
6451000000	Clinical Documentation Software	1	650,000	1	650,000
6451000000	Server Storage Node	1	300,000	1	300,000
6451000000	Surgical Light	1	279,200	1	279,200
6451000000	Portable Cardiac Monitor	1	260,900	1	260,900
6451000000	Capacity/Bed Management Equipment	1	216,000	1	216,000
6451000000	3D Workstation	1	184,800	1	184,800
6451000000	Replacement MRI Patient Monitor	1	165,700	1	165,700
6451000000	EEG Medical Device	1	124,600	1	124,600
6451000000	Ultrasound System	1	58,600	1	58,600
6451000000	Refrigerator/Freezer Temperature Monitoring System	1	52,300	1	52,300
6451000000	Ultrasound Probe Sterilizer	1	50,200	1	50,200
6451000000	Ventilator	1	46,700	1	46,700
6451000000	UPS/Battery Replacement	1	44,300	1	44,300
6451000000	Steam Sterilizer	1	41,166	1	41,166
6451000000	Continuous Renal Replacement Therapy Device	1	34,900	1	34,900
6451000000	Anesthesia Monitoring Device	1	31,100	1	31,100
6451000000	Ultrasound Probe Sterilizer	1	17,200	1	17,200
6451000000	Ultrasound Probe Sterilizer	1	16,700	1	16,700
6451000000	ADA Procedure Chair	1	12,400	1	12,400
6451000000	Bariatric Lift	1	11,300	1	11,300
6451000000	Bladder Scanner	1	10,700	1	10,700
6451000000	ADA Exam Table	1	9,900	1	9,900
6451000000	ADA Exam Bed	1	9,900	1	9,900
6451000000	Dual LED Ceiling Light	1	5,900	1	5,900
6451000000	Catheter Guidance Device	1	5,400	1	5,400
	Total		\$10,000,000		\$10,000,000

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<b>BUDGET UNIT</b>		<b>REQUESTED</b>		<b>ADOPTED</b>	
Description of Equipment/Structures & Improvements		<b>UNITS</b>	<b>AMOUNT</b>	<b>UNITS</b>	<b>AMOUNT</b>
<b>9230901000: AIRPORT ENTERPRISE</b>					
6411110012	Per- and Polyfluoroalkyl Substances (PFAS) Investigation	1	\$400,000	1	\$400,000
6411110017	Slurry Seal	1	111,585	1	111,585
6411112400	SJCOG Measure K Expenditure Plan	1	310,000	1	310,000
6451000000	Terminal Signage	1	100,000	1	100,000
6451000000	Forklift	1	50,000	1	50,000
6451000000	Front Loader Bucket Attachment	1	50,000	1	50,000
6451000000	Herbicide Spraying Equipment	1	50,000	1	50,000
6451000000	LED Lighting	1	16,000	1	16,000
6451000000	Backhoe Attachment	1	10,000	1	10,000
6451000000	Mower	1	5,000	1	5,000
Total			\$1,102,585		\$1,102,585
<b>9231000000: AIRPORT-CAPITAL PROJECTS</b>					
6411110006	Cargo Apron Expansion	1	\$395,867	1	\$395,867
6411110008	Terminal Security Access Control	1	75,581	1	75,581
6411110016	Rehabilitate General Aviation Taxilane	1	737,586	1	737,586
6411110021	Rehabilitate Cargo Taxilane	1	2,694,692	1	2,694,692
6411110022	Lindbergh Street Rehabilitation	1	1,700,000	1	1,700,000
6411110023	Fence Realignment For Baggage	1	2,500,000	1	2,500,000
6411110800	Airport Layout Plan Update	1	666,798	1	666,798
Total			\$8,770,524		\$8,770,524
<b>Grand Total</b>			<b><u>\$207,462,381</u></b>		<b><u>\$207,462,381</u></b>



# SAN JOAQUIN

—COUNTY—

Office of the County Administrator

[www.sjgov.org/departments/cao](http://www.sjgov.org/departments/cao)

