



South Coast Air Quality Management District

21865 Copley Drive, Diamond Bar, CA 91765-4178
(909) 396-2000 • www.aqmd.gov

HYBRID LEGISLATIVE COMMITTEE MEETING

Committee Members

Supervisor V. Manuel Perez, Committee Chair
Supervisor Curt Hagman, Committee Vice Chair
Mayor Patricia Lock Dawson
Supervisor Janet Nguyen
Councilmember Adrin Nazarian
Vice Mayor Brenda Olmos

April 10, 2026 ♦ 9:00 a.m.

TELECONFERENCE LOCATION

Office of Supervisor V. Manuel Perez 78015 Main Street Suite 205 La Quinta, CA 92253	Paramount City Hall 16400 Colorado Ave. Paramount, CA 90723
Huntington Beach Central Library Balboa Room 7111 Talbert Avenue Huntington Beach, CA 92648	North Hollywood District Office 5250 Lankershim Blvd Suite 530 North Hollywood, CA 91601
Riverside City Hall 7 th Floor Conference Room 3900 Main St. Riverside, CA 92522	

A meeting of the South Coast Air Quality Management District Legislative Committee will be held at 9:00 a.m. on Friday, April 10, 2026 through a hybrid format of in-person attendance in the Dr. William A. Burke Auditorium at the South Coast AQMD Headquarters, 21865 Copley Drive, Diamond Bar, California, and remote attendance via videoconferencing and by telephone. Please follow the instructions below to join the meeting remotely.

Please refer to South Coast AQMD’s website for information regarding the format of the meeting, updates if the meeting is changed to a full remote via webcast format, and details on how to participate:

<http://www.aqmd.gov/home/news-events/meeting-agendas-minutes>

INSTRUCTIONS FOR ELECTRONIC PARTICIPATION AT BOTTOM OF AGENDA

Join Zoom Webinar Meeting - from PC or Laptop

<https://aqmd.zoomgov.com/j/1605934245>

Zoom Webinar ID: 160 593 4245 (applies to all)

Teleconference Dial In

+1 669 254 5252

One tap mobile

+1 6692545252,, 1 605934245#

Audience will be able to provide public comment through telephone or Zoom connection during public comment periods.

PUBLIC COMMENT WILL STILL BE TAKEN

AGENDA

Members of the public may address this body concerning any agenda item before or during consideration of that item (Gov't. Code Section 54954.3(a)). If you wish to speak, raise your hand on Zoom or press Star 9 if participating by telephone. All agendas for regular meetings are posted at South Coast AQMD Headquarters, 21865 Copley Drive, Diamond Bar, California, at least 72 hours in advance of the regular meeting. Speakers may be limited to three (3) minutes total for all items on the agenda.

Please note that under the California Public Records Act (Gov't. Code § 7920.000 et seq.) your written and oral comments, attachments, and associated contact information (e.g., your address, phone, email) become part of the public record and can be released to the public on request or posted on the South Coast AQMD website.

CALL TO ORDER

ROLL CALL

DISCUSSION ITEMS (Items 1-3):

1. **Issue RFP for Legislative Representation in Sacramento**
(Motion Requested)

The current contracts for legislative representation in Sacramento expire on December 31, 2026. This action calls for the issuance of a Request For Proposal (RFP) for legislative consulting services for South Coast AQMD in Sacramento beginning in 2027.

[Attachment 1a-1b]

Lisa Tanaka
*Deputy Executive Officer
Legislative, Public Affairs &
Media*

2. **Update on South Coast AQMD Sponsored Bill**
(No Motion Required)

Staff will provide an update to the Committee on South Coast AQMD's sponsored state bill:

Carlos Gonzalez
*Assistant Deputy Executive
Officer
Legislative, Public Affairs &
Media*

- AB 2349 (Solache) - State Air Resources Board: regional air quality incident response program

3. **Recommended Position on State Bills**
(Motion Requested)

This item is to seek approval from the Committee on staff's recommendation for a position on the following list:
[Attachment 2a-2h]

<u>Bill#</u>	<u>Author</u>	<u>Bill Title</u>	
AB 1661	Bryan	Oil and gas: low-production wells: Baldwin Hills Conservancy: Equitable Community Repair and Reinvestment Account.	Matthew Ceja <i>Federal Legislative Analyst Legislative, Public Affairs & Media</i>
AB 2175	Garcia	Electricity: electrical transmission and distribution systems.	Philip Crabbe <i>Senior Public Affairs Manager Legislative, Public Affairs & Media</i>
AB 2239	Carillo	Infrastructure-constrained energization areas: energization timelines: environmental review.	Philip Crabbe
SB 1270	Richardson	Wildfire mitigation program: financial assistance to counties.	Matthew Ceja

DISCUSSION ITEM: 4 and 5

4. **Update and Discussion on Federal Legislative Issues**
(No Motion Required)

Consultants will provide a brief oral report on Federal legislative activities in Washington D.C.
[Attachment 3a-3c - Written Reports]

Jed Dearborn
Cassidy & Associates

Dal Harper
Carmen Group

Ben Miller
Kadesh & Associates

**5. Update and Discussion on State Legislative Issues
(No Motion Required)**

Consultants will provide a brief oral report on State legislative activities in Sacramento.

[Attachment 4a-4c - Written Reports]

David Quintana

Resolute

Ross Buckley

Buckley Government Affairs

Paul Gonsalves

Joe A. Gonsalves & Son

OTHER MATTERS:

6. Other Business

Any member of this body, or its staff, on his or her own initiative or in response to questions posed by the public, may ask a question for clarification, may make a brief announcement or report on his or her own activities, provide a reference to staff regarding factual information, request staff to report back at a subsequent meeting concerning any matter, or may take action to direct staff to place a matter of business on a future agenda. (Gov't. Code Section 54954.2)

7. Public Comment Period

At the end of the regular meeting agenda, an opportunity is provided for the public to speak on any subject within the Legislative Committee's authority that is not on the agenda. Speakers may be limited to three (3) minutes.

8. Next Meeting Date – May 8, 2026 at 9:00 a.m.

ADJOURNMENT

Document Availability

All documents (i) constituting non-exempt public records, (ii) relating to an item on an agenda for a regular meeting, and (iii) having been distributed to at least a majority of the Committee after the agenda is posted, are available by contacting Maria Corralejo at (909) 396-2759 or send the request to mcorralejo@aqmd.gov.

Americans with Disabilities Act and Language Accessibility

Disability and language-related accommodations can be requested to allow participation in the Legislative Committee meeting. The agenda will be made available, upon request, in appropriate alternative formats to assist persons with a disability (Gov't Code Section 54954.2(a)). In addition, other documents may be requested in alternative formats and languages. Any disability or language-related accommodation must be requested as soon as practicable. Requests will be accommodated unless providing the accommodation would result in a fundamental alteration or undue burden to South Coast AQMD. Please contact Maria Corralejo at (909) 396-2759 from 7:00 a.m. to 5:30 p.m., Tuesday through Friday, or send the request to mcorralejo@aqmd.gov.

INSTRUCTIONS FOR ELECTRONIC PARTICIPATION

Instructions for Participating in a Virtual Meeting as an Attendee

As an attendee, you will have the opportunity to virtually raise your hand and provide public comment.

Before joining the call, please silence your other communication devices such as your cell or desk phone. This will prevent any feedback or interruptions during the meeting.

Please note: During the meeting, all participants will be placed on mute by the host. You will not be able to mute or unmute your lines manually.

After each agenda item, the Chair will announce public comment.

A countdown timer will be displayed on the screen for each public comment.

If interpretation is needed, more time will be allotted.

Once you raise your hand to provide public comment, your name will be added to the speaker list. Your name will be called when it is your turn to comment. The host will then unmute your line.

Directions for Video ZOOM on a DESKTOP/LAPTOP:

- If you would like to make a public comment, please click on the “**Raise Hand**” button on the bottom of the screen.
- This will signal to the host that you would like to provide a public comment and you will be added to the list.

Directions for Video Zoom on a SMARTPHONE:

- If you would like to make a public comment, please click on the “**Raise Hand**” button on the bottom of your screen.
- This will signal to the host that you would like to provide a public comment and you will be added to the list.

Directions for TELEPHONE line only:

- If you would like to make public comment, please **dial *9** on your keypad to signal that you would like to comment.

BOARD MEETING DATE: May 1, 2026

AGENDA NO.

PROPOSAL: Issue RFP for Legislative Representation in Sacramento

SYNOPSIS: Legislative representation for South Coast AQMD in Sacramento is critical to advance Governing Board policies and priorities through engagement with the Senate, Assembly, Governor’s Office, and agencies. The current contracts for legislative representation in Sacramento expire on December 31, 2026. This action calls for the issuance of a Request For Proposal (RFP) for legislative consulting services for South Coast AQMD in Sacramento California for 2027. The RFP will also indicate that the service contract(s) may be extended for up to one additional two-year term. Total expenditure for the contract(s) shall not exceed \$465,000 for the initial year of the two-year period.

COMMITTEE: Legislative, April 10, 2026, Recommended for Approval

RECOMMENDED ACTION:

Approve release of RFP P2026-XX to solicit proposals for legislative representation in Sacramento California at a cost not to exceed \$465,000 for each year of the two-year period, with one additional two-year term extension upon approval of the Governing Board.

Wayne Natri
Executive Officer

Background

Legislative representation for South Coast AQMD in Sacramento is critical to advancing the Board's policies and priorities through direct engagement with the Legislature, Governor's Office, agencies, and other stakeholders. South Coast AQMD's legislative representatives engage in ongoing communication with Capitol offices to build and maintain relationships and effectively represent the agency's interests. Core activities include, but are not limited to:

- Acting as a liaison with Capitol offices on Board policy and funding priorities;
- Protecting the agency's regulatory authority to adopt and implement rules, regulations and policies that are needed to achieve state and federal air quality standards;
- Monitoring, analyzing, and recommending positions on bills, and representing the agency through testimony and negotiations on legislative and budget matters;
- Advocating for South Coast AQMD's sponsor and position bills to achieve Board priorities;
- Providing technical expertise and serving as a resource on air quality issues to build relationships on behalf of the agency; and
- Securing funding and support for technology advancement, emission reduction projects, and incentive programs.

These efforts also include fostering state support for South Coast AQMD's federal initiatives.

A challenging political and economic environment is expected to continue to affect legislative, funding, and policy issues. South Coast AQMD is expected to continue to navigate issues framed by affordability concerns, a tight state budget, high fuel and energy costs, increased scrutiny of zero-emission mandates, efforts to prescribe or repeal local rules and regulations, ongoing issues on energization, deployment of infrastructure and clean technologies, data centers, and other. These challenges will be compounded by continued turnover in the Legislature, requiring renewed outreach and education to newly elected members and staff who may be less familiar with South Coast AQMD's mission, authority, and regional air quality needs. As a result, maintaining a strong, consistent, and strategic presence in Sacramento will be critical to advancing South Coast AQMD's policy and funding priorities. Legislative representation for South Coast AQMD in 2027 may include advancing the following policy and funding priorities:

- Protect and expand funding by maintaining existing resources, such as Greenhouse Gas Reduction Fund, and identifying new, sustainable revenue streams to support programs that achieve state and federal air quality standards, implement the

Community Air Protection Program (AB 617), and reduce toxic air contaminants to protect public health.

- Preserve South Coast AQMD authority to raise revenue and impose fees as needed and to implement the Board's clean air policies and programs, including those required by state and federal Clean Air Acts, to support Air Quality Management Plans, State Implementation Plans and Letters of Commitment with U.S. EPA and CARB. Additionally, oppose unfunded state mandates.
- Advance clean transportation and goods movement policies by supporting funding and programs that accelerate deployment of the cleanest technologies available with a priority on zero-emission where commercially viable for medium- and heavy-duty trucks, locomotives, oceangoing vessels, aircraft, and off-road equipment.
- Advocate for policies and funding to address energization challenges such as interconnection, grid capacity, infrastructure upgrades, permitting hurdles, and reliability.

Additional issues of potential interest include data centers, CEQA reform, and other.

Proposal

South Coast AQMD seeks the service(s) of contractor(s) to support the Board's goals and objectives for 2027 in Sacramento, California. The selected firm(s) will be expected to provide a variety of services, consistent with the Board's direction. Funding for the initial year of the two-year period shall be up to a maximum of \$465,000. The contract(s) may include options for one two-year renewal, contingent on satisfactory performance and approval of subsequent budgets, at the Board's discretion.

Bid Evaluation

Proposals received will be initially evaluated by a diverse panel of technically qualified individuals according to the criteria described in the attached RFP P2026-XX. The Legislative Committee of the Board is expected to conduct oral interviews of the most highly qualified bidders and will make a recommendation to the full Board for approval.

Outreach

In accordance with South Coast AQMD's Procurement Policy and Procedure, a public notice advertising the RFP/RFQ and inviting bids will be published in the Los Angeles Times, the Orange County Register, the San Bernardino Sun, the Sacramento Bee, and the Riverside Press Enterprise newspapers to leverage the most cost-effective method of outreach to the South Coast region.

Additionally, potential bidders may be notified utilizing South Coast AQMD's own electronic listing of certified minority vendors. Notice of the RFP/RFQ will be e-mailed

to the Legislative Caucuses and various minority chambers of commerce and business associations and placed on South Coast AQMD's website (www.aqmd.gov) where it can be viewed by making the selection "Grants & Bids."

Resource Impacts

Sufficient funds are available in the Legislative, Public Affairs & Media FY 2026-27 Budget for the first year of services requested. Funding for future fiscal years will be requested through the annual budget process.

Attachment

RFP P2026-XX For Legislative Representation in Sacramento, California



SOUTH COAST AIR QUALITY MANAGEMENT DISTRICT

REQUEST FOR PROPOSALS

FOR LEGISLATIVE REPRESENTATION IN SACRAMENTO, CALIFORNIA

P2026-XX

South Coast Air Quality Management District (South Coast AQMD) requests proposals for the following purpose according to terms and conditions attached. In the preparation of this Request for Proposals (RFP) the words "Proposer," "Contractor," "Consultant," "Bidder" and "Firm" are used interchangeably.

PURPOSE

South Coast AQMD requires representation in Sacramento, California, to ensure that air quality legislation and other related issues are monitored and that South Coast AQMD viewpoints are presented in an effective, timely, and persuasive manner during the legislative and policy-making process.

The purpose of this RFP is to contract with outside representative(s) knowledgeable in air quality-related issues to provide assistance with and representation of South Coast AQMD policy positions and funding needs before the California State Legislature, Governor's Office, and state agencies. The consultant(s) selected pursuant to this RFP will be reimbursed on a monthly basis for services rendered at an agreed upon flat monthly fee and for actual costs incurred for out-of-pocket expenses. The consultant may make use of the services of subcontractors, on an as-needed basis. A list of names of subcontractors along with their qualifications and the total hours of services expected shall be submitted with responses to this RFP. All subcontractors are subject to approval by South Coast AQMD, and pre-approval is required before commencing any work.

The selected firm(s) will be expected to provide a variety of services, to be outlined in the work statement, and consistent with South Coast AQMD Governing Board ("Board") directions. Funding for the initial year shall be up to a maximum of **\$465,000**. The contract may include an option for one, two-year renewal, contingent on satisfactory performance and approval of subsequent budgets, upon approval of the Board.

INDEX – The following are contained in this RFP:

Section I	Background/Information
Section II	Contact Person
Section III	Schedule of Events
Section IV	Participation in the Procurement Process
Section V	Statement of Work/Schedule of Deliverables
Section VI	Required Qualifications
Section VII	Proposal Submittal Requirements
Section VIII	Proposal Submission
Section IX	Proposal Evaluation/Contractor Selection Criteria
Section X	Funding
Section XI	Sample Contract
Attachment A	- Participation in the Procurement Process
Attachment B	- Certifications and Representations

SECTION I: BACKGROUND/INFORMATION

South Coast AQMD is the air pollution control agency for all of Orange County and the urban portions of Los Angeles, Riverside, and San Bernardino counties, the smoggiest region of the U.S. As a regulatory agency, South Coast AQMD is committed to protecting the health of residents of the four-county area from the harmful effects of air pollution, while remaining sensitive to businesses and the economic vitality of the region.

Legislative representation for South Coast AQMD in Sacramento is critical to advancing the Board's policies and priorities through direct engagement with the Legislature, Governor's Office, agencies, and other stakeholders. South Coast AQMD's legislative representatives engage in ongoing communication with Capitol offices to build and maintain relationships and effectively represent the agency's interests. This legislative presence includes delivering technical information, providing assistance, and otherwise serving as a resource to legislators and the Governor's Office regarding air quality matters; acting as a liaison between South Coast AQMD and legislators and the Governor's Office regarding the Board's policy and funding priorities; seeking funding and program support for technology advancement and emission reduction projects and incentive programs; and advocating for South Coast AQMD's positions on air quality-related legislation. These efforts also include fostering support for South Coast AQMD's federal initiatives which have synergy at the state level.

A challenging political and economic environment is expected to continue to affect legislative, funding, and policy issues. South Coast AQMD is expected to continue to navigate issues framed by affordability concerns, a tight state budget, high fuel and energy costs, increased scrutiny of zero-emission mandates, efforts to prescribe or repeal local rules and regulations, ongoing issues on energization, deployment of infrastructure and clean technologies, data centers, and other. These challenges will be compounded by continued turnover in the Legislature, requiring renewed outreach and education to newly elected members and staff who may be less familiar with South Coast AQMD's mission, authority, and regional air quality needs. As a result, maintaining a strong, consistent, and strategic presence in Sacramento will be critical to advancing South Coast AQMD's policy and funding priorities. Legislative representation for South Coast AQMD in 2027 may include advancing the following policy and funding priorities:

- Protect and expand funding by maintaining existing resources, such as Greenhouse Gas Reduction Fund, and identifying new, sustainable revenue streams to support programs that achieve state and federal air quality standards, implement the Community Air Protection Program (AB 617), and reduce toxic air contaminants to protect public health.
- Preserve South Coast AQMD authority to raise revenue and impose fees as needed and to implement the Board's clean air policies and programs, including those required by state and federal Clean Air Act laws, to support Air Quality Management Plans, State Implementation Plans and Letters of Commitment with U.S. EPA and CARB. Additionally, oppose unfunded state mandates.
- Advance clean transportation and goods movement policies by supporting funding and programs that accelerate deployment of the cleanest technologies available

with a priority on zero-emission where commercially viable for medium- and heavy-duty trucks, locomotives, oceangoing vessels, aircraft, and off-road equipment.

- Advocate for policies and funding to address energization challenges such as interconnection, grid capacity, infrastructure upgrades, permitting hurdles, and reliability.
- Support and advocate for legislative and administrative policies and funding that:
 - 1) promote and sustain environmental justice initiatives which reduce localized health risks resulting from criteria pollutant and toxic air contaminant emissions;
 - 2) prioritize equitable access to zero-emission or cleanest available technologies for over-burdened communities;
 - 3) enhance community participation in decision-making; and
 - 4) provide the resources necessary to fully implement local air districts' responsibilities and initiatives created through the AB 617 Community Air Protection Program, including implementing CARB's blueprint to expand the program to address communities that have been consistently nominated.
- Support legislative policies and administrative actions that promote job retention and creation, workforce training for zero-emission technologies, as well as economic growth, while working toward attainment of clean air standards; and that support and assist the regulated community in complying with rules and regulations in the most efficient and cost-effective manner. Work to ensure job and economic benefits are equitably accessible to environmental justice communities.
- Support and advocate for legislative and administrative policies, programs, and funding that reduce and/or mitigate air quality-related public health impacts within the South Coast region caused by wildfires, dust/sandstorms, odors, or other events.
- Support and seek legislative and administrative policies, programs, funding and/or actions that ensure that South Coast AQMD can meet its administrative and operational needs, including, but not limited to, those related to human resources and pensions.
- Additional issues of potential interest include data centers, CEQA reform, and other.

The legislative priorities for South Coast AQMD for 2027 will be further refined and presented to the Board's Legislative Committee and the full Board for approval later in the year, as determined by the course of events in 2026.

SECTION II: CONTACT PERSON:

Questions regarding the content or intent of this RFP or on procedural matters should be addressed to:

Philip Crabbe III, Legislative Public Affairs & Media
 South Coast AQMD
 21865 Copley Drive
 Diamond Bar, CA 91765-4178
 (909) 396-2632

SECTION III: SCHEDULE OF EVENTS

Date	Event
May 1, 2026	RFP Released
June 5, 2026	Proposals Due to South Coast AQMD - No Later Than 1:00 pm
June 8-June 19, 2026	Proposal Evaluations
August 14, 2026	Interviews, if required
September 4, 2026	Governing Board Approval
December 31, 2026	Anticipated Contract Execution

SECTION IV: PARTICIPATION IN THE PROCUREMENT PROCESS

It is the policy of South Coast AQMD to ensure that all businesses including minority business enterprises, women business enterprises, disabled veteran business enterprises and small businesses have a fair and equitable opportunity to compete for and participate in South Coast AQMD contracts. Attachment A to this RFP contains definitions and further information.

SECTION V: STATEMENT OF WORK/SCHEDULE OF DELIVERABLES

A. Statement of Work

Under the direction of the Executive Officer or Deputy Executive Officer of Legislative, Public Affairs and Media, and in coordination with South Coast AQMD legislative staff, the consultant(s) shall gather information, provide advice and assistance, and/or advocate positions on legislation in Sacramento as it directly pertains to the ability of the South Coast AQMD to carry out its statutory responsibilities. The selected Consultant(s) will perform the services listed below on legislative/regulatory matters; however, the responsibilities of the selected Consultant(s) under the contract pursuant to this RFP are not necessarily limited to items listed since there may be other legislative needs that may arise during the course of the legislative process.

1. Based on Governing Board Approved State Legislative Guiding Principles, prepare a written strategic and tactical implementation plan for 2027;
2. Drafting, and/or assisting South Coast AQMD staff, consultants, or other parties in drafting, legislation and other policies and procedures as requested by South Coast AQMD and coordinating or assisting in their introduction in the California Legislature;
3. Reviewing, identifying, tracking, and monitoring both the actions of the administration and related state agencies as well as the California Legislature for legislation and other proposals potentially affecting air quality and South Coast AQMD's operations, authority, and funding;
4. Advocating, as directed by South Coast AQMD, on all identified and/or drafted legislation and administrative and other proposals, providing testimony at committee and other special hearings, and providing written communications to legislators, key administrative officials, and other staff regarding South Coast AQMD priorities;

5. Negotiating bill language, policies, or other state agency provisions related to air quality issues;
6. Assist in the integration of South Coast AQMD's state legislative agenda with its federal legislative agenda and local efforts;
7. Planning for and handling unforeseen emergency situations involving legislative or administrative items, at the direction of South Coast AQMD;
8. Producing materials for strategic distribution or inclusion in Legislative Committee/Board proceedings;
9. Providing regular reports on the status of all legislative and administrative activities in which interest is expressed by South Coast AQMD or that affect South Coast AQMD;
10. Identifying the administration's upcoming environmental legislative agenda and providing work plans, analysis, and consultation on strategies to align efforts to secure support for South Coast AQMD proposals;
11. Securing support for South Coast AQMD's mission and policy priorities by the decision-makers in the legislative and administrative bodies of the State of California, including the Governor's Office;
12. Gathering information on and scheduling appointments on behalf of South Coast AQMD with key legislators and administration members and appointees;
13. Attending and participating in meetings with legislative representatives and administration members and appointees to solely discuss the interests and goals of South Coast AQMD;
14. Preparing all reports and filings in the matter and form required of South Coast AQMD pursuant to the Political Reform Act of 1974 as amended and assisting South Coast AQMD in filing such reports. The contractor will promptly furnish to South Coast AQMD a copy of all reports filed with any governmental agency concerning its lobbying activities on behalf of South Coast AQMD.

*A copy of the 2026 South Coast AQMD Governing Board's State Legislative Guiding Principles is herein incorporated as reference as Attachment C.

B. Schedule of Deliverables

1. Preparation of a Strategic Plan for the upcoming legislative year by no later than January 15, 2027, maximizing South Coast AQMD Board and staff participation and involvement in the legislative process;
2. Written drafts of legislative/administrative proposals as requested by South Coast AQMD. Such drafts are to be submitted for review by South Coast AQMD prior to being released;
3. Written updates of administrative actions pertaining to air quality-related issues or South Coast AQMD's programs. Such reports are to summarize each proposal/action and its potential impacts, recommend a South Coast AQMD position as appropriate, and identify any upcoming meetings or hearings to discuss the proposal;
4. Participation in the monthly South Coast AQMD Legislative Committee meetings, upon South Coast AQMD staff request, to provide updates and presentations on relevant legislative and administrative issues and legislation recommended for South Coast AQMD positions;
5. Written communications to legislators and key administrative officials conveying South Coast AQMD positions on various bills and administrative actions.

6. Following adjournment of the legislative session, a year-end report delineating and summarizing the final status/disposition of relevant legislative and administrative actions;
7. Legislative/administrative activities reports and legislative program planning documents and calendars as requested;
8. May include a “Capitol Briefing” or “Clean Air Legislative Action Day” or similar event(s) during the contract period to help establish an ongoing South Coast AQMD presence in the Capitol to garner support for the agency’s mission and policy priorities and maintain the agency’s presence as a resource to the Legislature and the Governor’s Office;
9. A weekly written report covering pertinent legislative activities during the legislative session, written quarterly reports, a year-end report, and a year-end presentation delineating and summarizing relevant administrative and legislative actions;
10. A monthly written report to accompany invoice outlining contractor’s specific activities;
11. A monthly written report to be submitted for Legislative Committee, summarizing relevant legislative and administrative items and developments;
12. A signed confidentiality agreement; and
13. Maintaining permanent records from which the correctness of all written records and filings can be verified. These records are to be open to inspection by South Coast AQMD or its representatives during normal business hours.

SECTION VI: REQUIRED QUALIFICATIONS

- A. Persons or firms proposing to bid on this proposal must be qualified and experienced in representing and advising governmental agencies and must submit qualifications demonstrating this ability in cases involving as many as possible of the following areas: administrative law, legislative policymaking and procedure, South Coast AQMD Rules and Regulations, air quality law, and other environmental issues.
- B. Proposer must submit the following:
 1. Resumes or similar statement of qualifications of person or persons who may be designated as lead consultant(s) for legislative and administrative advocacy.
 2. List of representative clients.
 3. Summary of proposer's general qualifications to meet required qualifications and fulfill statement of work, including additional Firm personnel and resources.

SECTION VII: PROPOSAL SUBMITTAL REQUIREMENTS

Submitted proposals must follow the format outlined below and all requested information must be supplied. Failure to submit proposals in the required format will result in elimination from proposal evaluation. South Coast AQMD may modify the RFP or issue supplementary information or guidelines during the proposal preparation

period prior to the due date. Please check our website for updates (<http://www.aqmd.gov/grants-bids>). The cost for developing the proposal is the responsibility of the Contractor and shall not be chargeable to South Coast AQMD.

Each proposal must be submitted in three separate volumes:

- Volume I - Technical Proposal
- Volume II - Cost Proposal
- Volume III - Certifications and Representations included in Attachment B to this RFP, must be completed and executed by an authorized official of the Contractor.

A separate cover letter including the name, address, and telephone number of the contractor, and signed by the person or persons authorized to represent the Firm should accompany the proposal submission. Firm contact information as follows should also be included in the cover letter:

1. Address and telephone number of office in, or nearest to, Diamond Bar, California.
2. Name and title of Firm's representative designated as contact.

A separate Table of Contents should be provided for Volumes I and II.

VOLUME I - TECHNICAL PROPOSAL

DO NOT INCLUDE ANY COST INFORMATION IN THE TECHNICAL VOLUME

Summary (Section A) - State overall approach to meeting the objectives and satisfying the scope of work to be performed, the sequence of activities, and a description of methodology or techniques to be used.

Program Schedule (Section B) - Provide projected milestones or benchmarks for completing the project (to include reports) within the total time allowed.

Project Organization (Section C) - Describe the proposed management structure, program monitoring procedures, and organization of the proposed team. Provide a statement detailing your approach to the project, specifically address the Firm's ability and willingness to commit and maintain staffing to successfully complete the project on the proposed schedule.

Qualifications (Section D) - Describe the technical capabilities of the Firm. Provide references of other similar studies or projects performed during the last five years demonstrating ability to successfully complete the work. Include contact name, title, and telephone number for any references listed. Provide a statement of your Firm's background and related experience in performing similar services for other governmental organizations.

Assigned Personnel (Section E) - Provide the following information about the staff to be assigned to this project:

1. List all key personnel assigned to the project by level, name, and location. Provide a resume or similar statement describing the background, qualifications and

experience of the lead person and all persons assigned to the project. The substitute of project manager or lead personnel will not be permitted without prior written approval of South Coast AQMD.

2. Provide a spreadsheet of the labor hours proposed for each labor category at the task level.
3. Provide a statement indicating whether or not 90% of the work will be performed within the geographical boundaries of South Coast AQMD.
4. Provide a statement of education and training programs provided to, or required of, the staff identified for participation in the project, particularly with reference to management consulting, governmental practices and procedures, and technical matters.
5. Provide a summary of your Firm's general qualifications to meet required qualifications and fulfill statement of work, including additional Firm personnel and resources beyond those who may be assigned to the project.

Subcontractors (Section F) - This project may require expertise in multiple technical areas. List any subcontractors that will be used, identifying functions to be performed by them, their related

qualifications and experience and the total number of hours or percentage of time they will spend on the project.

Conflict of Interest (Section G) - Address possible conflicts of interest with other clients affected by actions performed by the Firm on behalf of South Coast AQMD. South Coast AQMD recognizes that prospective Contractors may be performing similar projects for other clients. Include a complete list of such clients for the past three (3) years with the type of work performed and the total number of years performing such tasks for each client. Although the Proposer will not be automatically disqualified by reason of work performed for such clients, South Coast AQMD reserves the right to consider the nature and extent of such work in evaluating the proposal.

Additional Data (Section H) - Provide other essential data that may assist in the evaluation of this proposal.

VOLUME II - COST PROPOSAL

Name and Address - The Cost Proposal must list the name and complete address of the Proposer in the upper left-hand corner.

Cost Proposal – South Coast AQMD anticipates awarding a fixed price contract. Cost information must be provided as listed below:

1. Detail must be provided by the following categories:
 - A. Labor – The Cost Proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of professional and administrative staff to be used to perform the tasks required by this RFP. Costs should be estimated for each of the components of the work plan.
 - B. Subcontractor Costs - List subcontractor costs and identify subcontractors by name. Itemize subcontractor charges per hour or per day.

- C. Travel Costs - Indicate amount of travel cost and basis of estimate to include trip destination, purpose of trip, length of trip, airline fare or mileage expense, per diem costs, lodging and car rental.
- D. Other Direct Costs -This category may include such items as postage and mailing expense, printing and reproduction costs, etc. Provide a basis of estimate for these costs.
2. It is the policy of the South Coast AQMD to receive at least as favorable pricing, warranties, conditions, benefits and terms as other customers or clients making similar purchases or receiving similar services. South Coast AQMD will give preference, where appropriate, to vendors who certify that they will provide "most favored customer" status to the South Coast AQMD. To receive preference points, Proposer shall certify that South Coast AQMD is receiving "most favored customer" pricing in the Business Status Certifications page of Volume III, Attachment B – Certifications and Representations.

VOLUME III - CERTIFICATIONS AND REPRESENTATIONS

(see Attachment B to this RFP)

SECTION VIII: PROPOSAL SUBMISSION

All proposals must be submitted according to specifications set forth in the section above, and this section. Failure to adhere to these specifications may be cause for rejection of the proposal.

Signature - All proposals must be signed by an authorized representative of the Proposer.

Due Date - **All proposals are due no later than 1:00 p.m., June 5, 2026, and should be directed to:**

Procurement Unit
 South Coast Air Quality
 Management District 21865 Copley
 Drive
 Diamond Bar, CA 91765-
 4178 (909) 396-3520

Submittal - Submit eight (8) complete copies of the proposal in a sealed envelope, plainly marked in the upper left-hand corner with the name and address of the Proposer and the words "Request for Proposals P2026-0X."

Late bids/proposals will not be accepted under any circumstances.

Grounds for Rejection - A proposal may be immediately rejected if:

- It is not prepared in the format described, or
- It is signed by an individual not authorized to represent the Firm.

Modification or Withdrawal - Once submitted, proposals cannot be altered without the

prior written consent of South Coast AQMD. All proposals shall constitute firm offers and may not be withdrawn for a period of ninety (90) days following the last day to accept proposals.

SECTION IX: PROPOSAL EVALUATION/CONTRACTOR SELECTION CRITERIA

- A. Proposals will be evaluated by a panel of three to five South Coast AQMD staff members familiar with the subject matter of the project. The panel shall be appointed by the Executive Officer or his designee. In addition, the evaluation panel may include such outside public sector or academic community expertise as deemed desirable by the Executive Officer. The panel will make a recommendation to the Executive Officer and/or the Governing Board of South Coast AQMD for final selection of a contractor and negotiation of a contract.
- B. Each member of the evaluation panel shall be accorded equal weight in his or her rating of proposals. The evaluation panel members shall evaluate the proposals according to the specified criteria and numerical weightings set forth below.

- a. R&D Projects Requiring Technical or Scientific Expertise, or Special Projects Requiring Unique Knowledge or Abilites

Understanding the Problem	20
Technical/Management Approach	20
Contractor Qualifications	20
Previous Experience on Similar Projects	10
Cost	<u>30</u>
TOTAL	100

- b. Additional Points

Small Business or Small Business Joint Venture	10
DVBE or DVBE Joint Venture	10
Use of DVBE or Small Business Subcontractors	7
Zero or Near-Zero Emission Vehicle Business	5
Local Business (Non-Federally Funded Projects Only)	5
Off-Peak Hours Delivery Business	2
Most Favored Customer	2

The cumulative points awarded for small business, DVBE, use of small business or DVBE subcontractors, Zero or Near-Zero emission vehicle business, local business, and off-peak hours delivery business shall not exceed 15 points. Most Favored Customer status incentive points shall be added, as applicable for a total of 17 points.

Self-Certification for Additional Points

The award of these additional points shall be contingent upon Proposer completing the Self-Certification section of Attachment B – Certifications and Representations and/or inclusion of a statement in the proposal self-certifying that Proposer qualifies for additional points as detailed above.

1. To receive additional points in the evaluation process for the categories of Small Business or Small Business Joint Venture, DVBE or DVBE Joint Venture or Local Business (for non-federally funded projects), the proposer must submit a self- certification at the time of proposal submission certifying that the proposer meets the requirements set forth in Attachments A and B. To receive points for the use of DVBE and/or Small Business subcontractors, at least 25 percent of the total contract value must be subcontracted to DVBEs and/or Small Businesses. To receive points as a Zero or Near-Zero Emission Vehicle Business, the proposer must demonstrate to the Executive Officer, or designee, that supplies and materials delivered to South Coast AQMD are delivered in vehicles that operate on clean-fuels. To receive points as a Local Business, the proposer must affirm that it has an ongoing business within the South Coast AQMD at the time of bid/proposal submittal and that 90% of the work related to the contract will be performed within the South Coast AQMD. Proposals for legislative representation, such as in Sacramento, California or Washington D.C. are not eligible for local business incentive points. Federally funded projects are not eligible for local business incentive points. To receive points as an Off-Peak Hours Delivery Business, the proposer must submit, at proposal submission, certification of its commitment to delivering supplies and materials to South Coast AQMD between the hours of 10:00 a.m. and 3:00 p.m. To receive points for Most Favored Customer status, the proposer must submit, at proposal submission, certification of its commitment to provide most favored customer status to the South Coast AQMD. The cumulative points awarded for Small Business, DVBE, use of Small Business or DVBE Subcontractors, Local Business, Zero or Near- Zero Emission Vehicle Business, Off-Peak Hour Delivery Business and Most Favored Customer shall not exceed 17 points.
 2. For procurement of Research and Development (R & D) projects or projects requiring technical or scientific expertise or special projects requiring unique knowledge and abilities, technical factors including past experience shall be weighted at 70 points and cost shall be weighted at 30 points. A proposal must receive at least 56 out of 70 points on R & D projects and projects requiring technical or scientific expertise or special projects requiring unique knowledge and abilities, in order to be deemed qualified for award.
 3. The lowest cost proposal will be awarded the maximum cost points available and all other cost proposals will receive points on a prorated basis. For example if the lowest cost proposal is \$1,000 and the maximum points available are 30 points, this proposal would receive the full 30 points. If the next lowest cost proposal is \$1,100 it would receive 27 points reflecting the fact that it is 10% higher than the lowest cost (90% of 30 points = 27 points).
- C. During the selection process the evaluation panel may wish to interview some proposers for clarification purposes only. No new material will be permitted at this

time. Additional information provided during the bid review process is limited to clarification by the Proposer of information presented in his/her proposal, upon request by South Coast AQMD.

- D. The Executive Officer or Governing Board may award the contract to a Proposer other than the Proposer receiving the highest rating in the event the Governing Board determines that another Proposer from among those technically qualified would provide the best value to South Coast AQMD considering cost and technical factors. The determination shall be based solely on the Evaluation Criteria contained in the Request for Proposal (RFP), on evidence provided in the proposal and on any other evidence provided during the bid review process.
- E. Selection will be made based on the above-described criteria and rating factors. The selection will be made by and is subject to Executive Officer or Governing Board approval. Proposers may be notified of the results by letter.
- F. The Governing Board has approved a Bid Protest Procedure which provides a process for a Bidder or prospective Bidder to submit a written protest to South Coast AQMD Procurement Manager in recognition of two types of protests: Protest Regarding Solicitation and Protest Regarding Award of a Contract. Copies of the Bid Protest Policy can be secured through a request to South Coast AQMD Procurement Department.
- G. The Executive Officer or Governing Board may award contracts to more than one proposer if in (his or their) sole judgment the purposes of the (contract or award) would best be served by selecting multiple proposers.
- H. If additional funds become available, the Executive Officer or Governing Board may increase the amount awarded. The Executive Officer or Governing Board may also select additional proposers for a grant or contract if additional funds become available.
- I. Disposition of Proposals – Pursuant to South Coast AQMD’s Procurement Policy and Procedure, South Coast AQMD reserves the right to reject any or all proposals. All proposals become the property of South Coast AQMD and are subject to the California Public Records Act. One copy of the proposal shall be retained for South Coast AQMD files. Additional copies and materials will be returned only if requested and at the proposer’s expense.
- J. **If proposal submitted is for a Public Works project as defined by State of California Labor Code Section 1720, Proposer is required to include Contractor Registration No. In Attachment B. Proposal submittal will be deemed as non-responsive and Bidder may be disqualified if Contractor Registration No. Is not included in Attachment B. Proposer is alerted to changes to California Prevailing Wage compliance requirements as defined in Senate Bill854 (Stat. 2014, Chapter 28), and California Labor Code Sections 1770, 1771, 1725, 1777, 1813, and 1815.**

SECTION X: FUNDING

The total funding for the work contemplated by this RFP will be a maximum **\$465,000** for the initial year of the two-year contract with an option to renew the contract for a second two-year extension for an estimated amount of **\$465,000** per year.

SECTION XI: SAMPLE CONTRACT

A sample contract to carry out the work described in this RFP is available on South Coast AQMD's website at <http://www.aqmd.gov/grants-bids> or upon request from the RFP Contact Person (Section II).

ATTACHMENT A
PARTICIPATION IN THE PROCUREMENT PROCESS

A. It is the policy of South Coast Air Quality Management District (South Coast AQMD) to ensure that all businesses including minority business enterprises, women business enterprises, disabled veteran business enterprises and small businesses have a fair and equitable opportunity to compete for and participate in South Coast AQMD contracts.

B. Definitions:

The definition of minority, women or disadvantaged business enterprises set forth below is included for purposes of determining compliance with the affirmative steps requirement described in Paragraph G below on procurements funded in whole or in part with federal grant funds which involve the use of subcontractors. The definition provided for disabled veteran business enterprise, local business, small business enterprise, Zero or Near-Zero emission vehicle business and off-peak hours delivery business are provided for purposes of determining eligibility for point or cost considerations in the evaluation process.

1. "Women business enterprise" (WBE) as used in this policy means a business enterprise that meets all of the following criteria:
 - a. a business that is at least 51 percent (51%) owned by one or more women, or in the case of any business whose stock is publicly held, at least 51 percent (51%) of the stock is owned by one or more or women.
 - b. a business whose management and daily business operations are controlled by one or more women.
 - c. a business which is a sole proprietorship, corporation, or partnership with its primary headquarters office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm, or other foreign-based business.
2. "Disabled veteran" as used in this policy is a United States military, naval, or air service veteran with at least 10 percent (10%) service-connected disability who is a resident of California.
3. "Disabled veteran business enterprise" (DVBE) as used in this policy means a business enterprise that meets all the following criteria:
 - a. is a sole proprietorship or partnership of which at least 51 percent (51%) is owned by one or more disabled veterans or, in the case of a publicly owned business, at least 51 percent (51%) of its stock is owned by one or more disabled veterans; a subsidiary which is wholly owned by a parent corporation but only if at least 51 percent (51%) of the voting stock of the parent corporation is owned by one or more disabled veterans; or a joint venture in which at least 51 percent (51%) of the joint venture's

- management and control and earnings are held by one or more disabled veterans.
- b. the management and control of the daily business operations are by one or more disabled veterans. The disabled veterans who exercise management and control are not required to be the same disabled veterans as the owners of the business.
 - c. is a sole proprietorship, corporation, or partnership with its primary headquarters office located in the United States, which is not a branch or subsidiary of a foreign corporation, firm, or other foreign-based business.
4. "Local business" as used in this policy means a company that has an ongoing business within geographical boundaries of South Coast AQMD at the time of bid or proposal submittal and performs 90 percent (90%) of the work related to the contract within the geographical boundaries of South Coast AQMD and satisfies the requirements of subparagraph H below. Proposals for legislative representation, such as in Sacramento, California or Washington D.C. are not eligible for local business incentive points.
 5. "Small business" as used in this policy means a business that meets the following criteria:
 - a. 1) an independently owned and operated business; 2) not dominant in its field of operation; 3) together with affiliates is either:
 - A service, construction, or non-manufacturer with 100 or fewer employees, and average annual gross receipts of ten million dollars (\$10,000,000) or less over the previous three years, or
 - A manufacturer with 100 or fewer employees.
 - b. Manufacturer means a business that is both of the following:
 - 1) Primarily engaged in the chemical or mechanical transformation of raw materials or processed substances into new products.
 - 2) Classified between Codes 311000 and 339000, inclusive, of the North American Industrial Classification System (NAICS) Manual published by the United States Office of Management and Budget, 2007 edition.
 6. "Joint ventures" as defined in this policy pertaining to certification means that one party to the joint venture is a DVBE or small business and owns at least 51 percent (51%) of the joint venture.
 7. "Zero or Near-Zero Emission Vehicle Business" as used in this policy means a company or contractor that uses Zero or Near-Zero emission vehicles in conducting deliveries to South Coast AQMD. Zero or Near-Zero emission vehicles

include vehicles powered by electric, compressed natural gas (CNG), liquefied natural gas (LNG), liquefied petroleum gas (LPG), ethanol, methanol and hydrogen and are certified to 90 percent (90%) or lower of the existing standard.

8. "Off-Peak Hours Delivery Business" as used in this policy means a company or contractor that commits to conducting deliveries to South Coast AQMD during off-peak traffic hours defined as between 10:00 a.m. and 3:00 p.m.
9. "Benefits Incentive Business" as used in this policy means a company or contractor that provides janitorial, security guard or landscaping services to South Coast AQMD and commits to providing employee health benefits (as defined below in Section VIII.D.2.d) for full time workers with affordable deductible and co-payment terms.
10. "Minority Business Enterprise" as used in this policy means a business that is at least 51 percent (51%) owned by one or more minority person(s), or in the case of any business whose stock is publicly held, at least 51 percent (51%) of the stock is owned by one or more or minority persons.
 - a. a business whose management and daily business operations are controlled by one or more minority persons.
 - b. a business which is a sole proprietorship, corporation, or partnership with its primary headquarters office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm, or other foreign-based business.
 - c. "Minority person" for purposes of this policy, means a Black American, Hispanic American, Native-American (including American Indian, Eskimo, Aleut, and Native Hawaiian), Asian-Indian (including a person whose origins are from India, Pakistan, and Bangladesh), Asian-Pacific-American (including a person whose origins are from Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the United States Trust Territories of the Pacific, Northern Marianas, Laos, Cambodia, and Taiwan).
11. "Most Favored Customer" as used in this policy means that the South Coast AQMD will receive at least as favorable pricing, warranties, conditions, benefits and terms as other customers or clients making similar purchases or receiving similar services.
12. "Disadvantaged Business Enterprise" as used in this policy means a business that is an entity owned and/or controlled by a socially and economically disadvantaged individual(s) as described by Title X of the Clean Air Act Amendments of 1990 (42 U.S.C. 7601 note) (10% statute), and Public Law 102-389 (42 U.S.C. 4370d)(8% statute), respectively;
 - a Small Business Enterprise (SBE);
 - a Small Business in a Rural Area (SBRA);
 - a Labor Surplus Area Firm (LSAF); or
 - a Historically Underutilized Business (HUB) Zone Small Business Concern, or a

concern under a successor program.

- C. Under Request for Quotations (RFQ), DVBEs, DVBE business joint ventures, small businesses, and small business joint ventures shall be granted a preference in an amount equal to 5 percent (5%) of the lowest cost responsive bid. Zero or Near-Zero Emission Vehicle Businesses shall be granted a preference in an amount equal to 5 percent of the lowest cost responsive bid. Off-Peak Hours Delivery Businesses shall be granted a preference in an amount equal to 2 percent (2%) of the lowest cost responsive bid. Local businesses (if the procurement is not funded in whole or in part by federal grant funds) shall be granted a preference in an amount equal to 2 percent (2%) of the lowest cost responsive bid. Businesses offering Most Favored Customer status shall be granted a preference in an amount equal to 2 percent (2%) of the lowest cost responsive bid.
- D. Under Request for Proposals, DVBEs, DVBE joint ventures, small businesses, and small business joint ventures shall be awarded ten (10) points in the evaluation process. A non-DVBE or large business shall receive seven (7) points for subcontracting at least 25 percent (25%) of the total contract value to a DVBE and/or small business. Zero or Near-Zero Emission Vehicle Businesses shall be awarded five (5) points in the evaluation process. On procurements which are not funded in whole or in part by federal grant funds local businesses shall receive five (5) points. Off-Peak Hours Delivery Businesses shall be awarded two (2) points in the evaluation process. Businesses offering Most Favored Customer status shall be awarded two (2) points in the evaluation process.
- E. South Coast AQMD will ensure that discrimination in the award and performance of contracts does not occur on the basis of race, color, sex, national origin, marital status, sexual preference, creed, ancestry, medical condition, or retaliation for having filed a discrimination complaint in the performance of South Coast AQMD contractual obligations.
- F. South Coast AQMD requires Contractor to be in compliance with all state and federal laws and regulations with respect to its employees throughout the term of any awarded contract, including state minimum wage laws and OSHA requirements.
- G. When contracts are funded in whole or in part by federal funds, and if subcontracts are to be let, the Contractor must comply with the following, evidencing a good faith effort to solicit disadvantaged businesses. Contractor shall submit a certification signed by an authorized official affirming its status as a MBE or WBE, as applicable, at the time of contract execution. South Coast AQMD reserves the right to request documentation demonstrating compliance with the following good faith efforts prior to contract execution.
1. Ensure Disadvantaged Business Enterprises (DBEs) are made aware of contracting opportunities to the fullest extent practicable through outreach and recruitment activities. For Indian Tribal, State and Local Government recipients, this will include placing DBEs on solicitation lists and soliciting them whenever they are potential sources.
 2. Make information on forthcoming opportunities available to DBEs and arrange time frames for contracts and establish delivery schedules, where the requirements permit, in a way that encourages and facilitates participation by DBEs in the competitive process. This includes, whenever possible, posting solicitations for bids or proposals for a

minimum of 30 calendar days before the bid or proposal closing date.

3. Consider in the contracting process whether firms competing for large contracts could subcontract with DBEs. For Indian Tribal, State and Local Government recipients, this will include dividing total requirements when economically feasible into smaller tasks or quantities to permit maximum participation by DBEs in the competitive process.
 4. Encourage contracting with a consortium of DBEs when a contract is too large for one of these firms to handle individually.
 5. Using the services and assistance of the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
 6. If the prime contractor awards subcontracts, require the prime contractor to take the above steps.
- H. To the extent that any conflict exists between this policy and any requirements imposed by federal and state law relating to participation in a contract by a certified MBE/WBE/DVBE as a condition of receipt of federal or state funds, the federal or state requirements shall prevail.
- I. When contracts are not funded in whole or in part by federal grant funds, a local business preference will be awarded. For such contracts that involve the purchase of commercial off-the-shelf products, local business preference will be given to suppliers or distributors of commercial off-the-shelf products who maintain an ongoing business within the geographical boundaries of South Coast AQMD. However, if the subject matter of the RFP or RFQ calls for the fabrication or manufacture of custom products, only companies performing 90 percent (90%) of the manufacturing or fabrication effort within the geographical boundaries of South Coast AQMD shall be entitled to the local business preference. Proposals for legislative representation, such as in Sacramento, California or Washington D.C. are not eligible for local business incentive points.
- J. In compliance with federal fair share requirements set forth in 40 CFR Part 33, South Coast AQMD shall establish a fair share goal annually for expenditures with federal funds covered by its procurement policy.

ATTACHMENT B

CERTIFICATIONS & REPRESENTATIONS



South Coast Air Quality Management District

21865 Copley Drive, Diamond Bar, CA 91765-4178
(909) 396-2000 • www.aqmd.gov

Business Information Request

Dear South Coast AQMD Contractor/Supplier:

South Coast Air Quality Management District (South Coast AQMD) is committed to ensuring that our contractor/supplier records are current and accurate. If your firm is selected for award of a purchase order or contract, it is imperative that the information requested herein be supplied in a timely manner to facilitate payment of invoices. In order to process your payments, we need the enclosed information regarding your account. **Please review and complete the information identified on the following pages, remember to sign all documents for our files, and return them as soon as possible to the address below:**

**Attention: Accounts Payable, Accounting Department
South Coast Air Quality Management District
21865 Copley Drive
Diamond Bar, CA 91765-4178**

If you do not return this information, we will not be able to establish you as a vendor. This will delay any payments and would still necessitate your submittal of the enclosed information to our Accounting department before payment could be initiated. Completion of this document and enclosed forms would ensure that your payments are processed timely and accurately.

If you have any questions or need assistance in completing this information, please contact Accounting at (909) 396-3777. We appreciate your cooperation in completing this necessary information.

Sincerely,

Sujata Jain
Chief Financial Officer

DH:nd

Enclosures: Business Information Request
Disadvantaged Business Certification
W-9
Form 590 Withholding Exemption Certificate
Federal Contract Debarment Certification
Campaign Contributions Disclosure



South Coast Air Quality Management District

21865 Copley Drive, Diamond Bar, CA 91765-4178
(909) 396-2000 • www.aqmd.gov

BUSINESS INFORMATION REQUEST

Business Name	
Division of	
Subsidiary of	
Website Address	
Type of Business <i>Check One:</i>	<input type="checkbox"/> Individual <input type="checkbox"/> DBA, Name _____, County Filed in _____ <input type="checkbox"/> Corporation, ID No. _____ <input type="checkbox"/> LLC/LLP, ID No. _____ <input type="checkbox"/> Other _____

REMITTING ADDRESS INFORMATION

Address			
City/Town			
State/Province		Zip	
Phone	() - Ext	Fax	() -
Contact		Title	
E-mail Address			
Payment Name if Different			

All invoices must reference the corresponding Purchase Order Number(s)/Contract Number(s) if applicable and mailed to:

**Attention: Accounts Payable, Accounting Department
South Coast Air Quality Management District
21865 Copley Drive
Diamond Bar, CA 91765-4178**

BUSINESS STATUS CERTIFICATIONS

Federal guidance for utilization of disadvantaged business enterprises allows a vendor to be deemed a small business enterprise (SBE), minority business enterprise (MBE) or women business enterprise (WBE) if it meets the criteria below.

- is certified by the Small Business Administration or
- is certified by a state or federal agency or
- is an independent MBE(s) or WBE(s) business concern which is at least 51 percent owned and controlled by minority group member(s) who are citizens of the United States.

Statements of certification:

As a prime contractor to South Coast AQMD, _____(name of business) will engage in good faith efforts to achieve the fair share in accordance with 40 CFR Section 33.301, and will follow the six affirmative steps listed below **for contracts or purchase orders funded in whole or in part by federal grants and contracts.**

1. Place qualified SBEs, MBEs, and WBEs on solicitation lists.
2. Assure that SBEs, MBEs, and WBEs are solicited whenever possible.
3. When economically feasible, divide total requirements into small tasks or quantities to permit greater participation by SBEs, MBEs, and WBEs.
4. Establish delivery schedules, if possible, to encourage participation by SBEs, MBEs, and WBEs.
5. Use services of Small Business Administration, Minority Business Development Agency of the Department of Commerce, and/or any agency authorized as a clearinghouse for SBEs, MBEs, and WBEs.
6. If subcontracts are to be let, take the above affirmative steps.

Self-Certification Verification: Also for use in awarding additional points, as applicable, in accordance with South Coast AQMD Procurement Policy and Procedure:

Check all that apply:

- | | |
|--|---|
| Small Business Enterprise/Small Business Joint Venture | Women-owned Business Enterprise |
| Local business | Disabled Veteran-owned Business Enterprise/DVBE Joint Venture |
| Minority-owned Business Enterprise | Most Favored Customer Pricing Certification |

Percent of ownership: _____%

Name of Qualifying Owner(s): _____

**State of California Public Works Contractor Registration No. _____
MUST BE INCLUDED IF BID PROPOSAL IS FOR PUBLIC WORKS PROJECT.**

I, the undersigned, hereby declare that to the best of my knowledge the above information is accurate. Upon penalty of perjury, I certify information submitted is factual.

NAME

TITLE

TELEPHONE NUMBER

DATE

Definitions

Disabled Veteran-Owned Business Enterprise means a business that meets all of the following criteria:

- is a sole proprietorship or partnership of which is at least 51 percent owned by one or more disabled veterans, or in the case of any business whose stock is publicly held, at least 51 percent of the stock is owned by one or more disabled veterans; a subsidiary which is wholly owned by a parent corporation but only if at least 51 percent of the voting stock of the parent corporation is owned by one or more disabled veterans; or a joint venture in which at least 51 percent of the joint venture’s management and control and earnings are held by one or more disabled veterans.
- the management and control of the daily business operations are by one or more disabled veterans. The disabled veterans who exercise management and control are not required to be the same disabled veterans as the owners of the business.
- is a sole proprietorship, corporation, partnership, or joint venture with its primary headquarters office located in the United States and which is not a branch or subsidiary of a foreign corporation, firm, or other foreign-based business.

Joint Venture means that one party to the joint venture is a DVBE and owns at least 51 percent of the joint venture. In the case of a joint venture formed for a single project this means that DVBE will receive at least 51 percent of the project dollars.

Local Business means a business that meets all of the following criteria:

- has an ongoing business within the boundary of South Coast AQMD at the time of bid application.
- performs 90 percent of the work within South Coast AQMD’s jurisdiction.

Minority-Owned Business Enterprise means a business that meets all of the following criteria:

- is at least 51 percent owned by one or more minority persons or in the case of any business whose stock is publicly held, at least 51 percent of the stock is owned by one or more minority persons.
- is a business whose management and daily business operations are controlled or owned by one or more minority person.
- is a business which is a sole proprietorship, corporation, partnership, joint venture, an association, or a cooperative with its primary headquarters office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm, or other foreign business.

“Minority” person means a Black American, Hispanic American, Native American (including American Indian, Eskimo, Aleut, and Native Hawaiian), Asian-Indian American (including a person whose origins are from India, Pakistan, or Bangladesh), Asian-Pacific American (including a person whose origins are from Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the United States Trust Territories of the Pacific, Northern Marianas, Laos, Cambodia, or Taiwan).

Small Business Enterprise means a business that meets the following criteria:

- a. 1) an independently owned and operated business; 2) not dominant in its field of operation; 3) together with affiliates is either:
 - α. **A service, construction, or non-manufacturer with 100 or fewer employees, and average annual gross receipts of ten million dollars (\$10,000,000) or less over the previous three years, or**
 - β. A manufacturer with 100 or fewer employees.
- b. Manufacturer means a business that is both of the following:
 - 1) Primarily engaged in the chemical or mechanical transformation of raw materials or processed substances into new products.
 - 2) Classified between Codes 311000 to 339000, inclusive, of the North American Industrial Classification System (NAICS) Manual published by the United States Office of Management and Budget, 2007 edition.

Small Business Joint Venture means that one party to the joint venture is a Small Business and owns at least 51 percent of the joint venture. In the case of a joint venture formed for a single project this means that the Small Business will receive at least 51 percent of the project dollars.

Women-Owned Business Enterprise means a business that meets all of the following criteria:

- is at least 51 percent owned by one or more women or in the case of any business whose stock is publicly held, at least 51 percent of the stock is owned by one or more women.
- is a business whose management and daily business operations are controlled or owned by one or more women.
- is a business which is a sole proprietorship, corporation, partnership, or a joint venture, with its primary headquarters office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm, or other foreign business.

Most Favored Customer as used in this policy means that the South Coast AQMD will receive at least as favorable pricing, warranties, conditions, benefits and terms as other customers or clients making similar purchases or receiving similar services.

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</p> <p>2 Business name/disregarded entity name, if different from above</p> <p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) ▶ _____</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p>5 Address (number, street, and apt. or suite no.) See instructions.</p> <p>6 City, state, and ZIP code</p> <p>7 List account number(s) here (optional)</p>	<p>Requester's name and address (optional)</p>

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number					
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or					
Employer identification number					
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Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (Interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What Is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. Individual. Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. Sole proprietor or single-member LLC. Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. Partnership, LLC that is not a single-member LLC, C corporation, or S corporation. Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. Other entities. Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. Disregarded entity. For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its Instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

- A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)
- B—The United States or any of its agencies or instrumentalities
- C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)
- E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)
- F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state
- G—A real estate investment trust
- H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940
- I—A common trust fund as defined in section 584(a)
- J—A bank as defined in section 581
- K—A broker
- L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLÉ accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee ¹ The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor ⁴
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

TAXABLE YEAR

CALIFORNIA FORM

2021 Withholding Exemption Certificate

590

The payee completes this form and submits it to the withholding agent. The withholding agent keeps this form with their records.

Withholding Agent Information

Name

Payee Information

Name

SSN or ITIN FEIN CA Corp no. CA SOS file no.

Address (apt./ste., room, PO box, or PMB no.)

City (If you have a foreign address, see instructions.)

State ZIP code

Exemption Reason

Check only one box.

By checking the appropriate box below, the payee certifies the reason for the exemption from the California income tax withholding requirements on payment(s) made to the entity or individual.

Individuals — Certification of Residency:

I am a resident of California and I reside at the address shown above. If I become a nonresident at any time, I will promptly notify the withholding agent. See instructions for General Information D, Definitions.

Corporations:

The corporation has a permanent place of business in California at the address shown above or is qualified through the California Secretary of State (SOS) to do business in California. The corporation will file a California tax return. If this corporation ceases to have a permanent place of business in California or ceases to do any of the above, I will promptly notify the withholding agent. See instructions for General Information D, Definitions.

Partnerships or Limited Liability Companies (LLCs):

The partnership or LLC has a permanent place of business in California at the address shown above or is registered with the California SOS, and is subject to the laws of California. The partnership or LLC will file a California tax return. If the partnership or LLC ceases to do any of the above, I will promptly inform the withholding agent. For withholding purposes, a limited liability partnership (LLP) is treated like any other partnership.

Tax-Exempt Entities:

The entity is exempt from tax under California Revenue and Taxation Code (R&TC) Section 23701 (insert letter) or Internal Revenue Code Section 501(c) (insert number). If this entity ceases to be exempt from tax, I will promptly notify the withholding agent. Individuals cannot be tax-exempt entities.

Insurance Companies, Individual Retirement Arrangements (IRAs), or Qualified Pension/Profit-Sharing Plans:

The entity is an insurance company, IRA, or a federally qualified pension or profit-sharing plan.

California Trusts:

At least one trustee and one noncontingent beneficiary of the above-named trust is a California resident. The trust will file a California fiduciary tax return. If the trustee or noncontingent beneficiary becomes a nonresident at any time, I will promptly notify the withholding agent.

Estates — Certification of Residency of Deceased Person:

I am the executor of the above-named person's estate or trust. The decedent was a California resident at the time of death. The estate will file a California fiduciary tax return.

Nonmilitary Spouse of a Military Servicemember:

I am a nonmilitary spouse of a military servicemember and I meet the Military Spouse Residency Relief Act (MSRRA) requirements. See instructions for General Information E, MSRRA.

CERTIFICATE OF PAYEE: Payee must complete and sign below.

To learn about your privacy rights, how we may use your information, and the consequences for not providing the requested information, go to ftb.ca.gov/forms and search for 1131. To request this notice by mail, call 800.852.5711.

Under penalties of perjury, I declare that I have examined the information on this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare under penalties of perjury that if the facts upon which this form are based change, I will promptly notify the withholding agent.

Type or print payee's name and title _____ Telephone _____

Payee's signature ► _____ Date _____

2021 Instructions for Form 590

Withholding Exemption Certificate

References in these instructions are to the California Revenue and Taxation Code (R&TC).

General Information

California Revenue and Taxation Code (R&TC) Section 18662 requires withholding of income or franchise tax on payments of California source income made to nonresidents of California. For more information, See General Information B, Income Subject to Withholding.

Registered Domestic Partners (RDPs) – For purposes of California income tax, references to a spouse, husband, or wife also refer to a California RDP unless otherwise specified. For more information on RDPs, get FTB Pub. 737, Tax Information for Registered Domestic Partners.

A Purpose

Use Form 590, Withholding Exemption Certificate, to certify an exemption from nonresident withholding.

Form 590 does not apply to payments of backup withholding. For more information, go to ftb.ca.gov and search for **backup withholding**.

Form 590 does not apply to payments for wages to employees. Wage withholding is administered by the California Employment Development Department (EDD). For more information, go to edd.ca.gov or call 888.745.3886.

Do not use Form 590 to certify an exemption from withholding if you are a **seller of California real estate**. Sellers of California real estate use Form 593, Real Estate Withholding Statement, to claim an exemption from the real estate withholding requirement.

The following are excluded from withholding and completing this form:

- The United States and any of its agencies or instrumentalities.
- A state, a possession of the United States, the District of Columbia, or any of its political subdivisions or instrumentalities.
- A foreign government or any of its political subdivisions, agencies, or instrumentalities.

B Income Subject to Withholding

Withholding is required on the following, but is not limited to:

- Payments to nonresidents for services rendered in California.
- Distributions of California source income made to domestic nonresident partners, members, and S corporation shareholders and allocations of California source income made to foreign partners and members.
- Payments to nonresidents for rents if the payments are made in the course of the withholding agent's business.
- Payments to nonresidents for royalties from activities sourced to California.

- Distributions of California source income to nonresident beneficiaries from an estate or trust.
- Endorsement payments received for services performed in California.
- Prizes and winnings received by nonresidents for contests in California.

However, withholding is optional if the total payments of California source income are \$1,500 or less during the calendar year.

For more information on withholding, get FTB Pub. 1017, Resident and Nonresident Withholding Guidelines. To get a withholding publication, see Additional Information.

C Who Certifies this Form

Form 590 is certified (completed and signed) by the payee. California residents or entities exempt from the withholding requirement should complete Form 590 and submit it to the withholding agent before payment is made. The withholding agent is then relieved of the withholding requirements if the agent relies in good faith on a completed and signed Form 590 unless notified by the Franchise Tax Board (FTB) that the form should not be relied upon.

An incomplete certificate is invalid and the withholding agent should not accept it. If the withholding agent receives an incomplete certificate, the withholding agent is required to withhold tax on payments made to the payee until a valid certificate is received. In lieu of a completed exemption certificate, the withholding agent may accept a letter from the payee as a substitute explaining why they are not subject to withholding. The letter must contain all the information required on the certificate in similar language, including the under penalty of perjury statement and the payee's taxpayer identification number (TIN).

The certification does not need to be renewed annually. The certification on Form 590 remains valid until the payee's status changes. The withholding agent must retain a copy of the certification or substitute for at least five years after the last payment to which the certification applies. The agent must provide it to the FTB upon request.

If an entertainer (or the entertainer's business entity) is paid for a performance, the entertainer's information must be provided. **Do not** submit the entertainer's agent or promoter information.

The grantor of a grantor trust shall be treated as the payee for withholding purposes. Therefore, if the payee is a grantor trust and one or more of the grantors is a nonresident, withholding is required. If all of the grantors on the trust are residents, no withholding is required. Resident grantors can check the box on Form 590 labeled "Individuals — Certification of Residency."

D Definitions

For California nonwage withholding purposes:

- **Nonresident** includes all of the following:
 - Individuals who are not residents of California.
 - Corporations not qualified through the California Secretary of State (CA SOS) to do business in California or having no permanent place of business in California.
 - Partnerships or limited liability companies (LLCs) with no permanent place of business in California.
 - Any trust without a resident grantor, beneficiary, or trustee, or estates where the decedent was not a California resident.
- **Foreign** refers to non-U.S.

For more information about determining resident status, get FTB Pub. 1031, Guidelines for Determining Resident Status. Military servicemembers have special rules for residency. For more information see General Information E, Military Spouse Residency Relief Act (MSRRA), and FTB Pub. 1032, Tax Information for Military Personnel.

Permanent Place of Business:

A corporation has a permanent place of business in California if it is organized and existing under the laws of California or it has qualified through the CA SOS to transact intrastate business. A corporation that has not qualified to transact intrastate business (e.g., a corporation engaged exclusively in interstate commerce) will be considered as having a permanent place of business in California only if it maintains a permanent office in California that is permanently staffed by its employees.

E Military Spouse Residency Relief Act (MSRRA)

Generally, for tax purposes you are considered to maintain your existing residence or domicile. If a military servicemember and nonmilitary spouse have the same state of domicile, the MSRRA provides:

- A spouse shall not be deemed to have lost a residence or domicile in any state solely by reason of being absent to be with the servicemember serving in compliance with military orders.
- A spouse shall not be deemed to have acquired a residence or domicile in any other state solely by reason of being there to be with the servicemember serving in compliance with military orders.

Domicile is defined as the one place:

- Where you maintain a true, fixed, and permanent home.
- To which you intend to return whenever you are absent.

A military servicemember's nonmilitary spouse is considered a nonresident for tax purposes if the servicemember and spouse have the same domicile outside of California and the spouse is in California solely to be with the servicemember who is serving in compliance with Permanent Change of Station orders.

California may require nonmilitary spouses of military servicemembers to provide proof that they meet the criteria for California personal income tax exemption as set forth in the MSRRA.

Income of a military servicemember's nonmilitary spouse for services performed in California is not California source income subject to state tax if the spouse is in California to be with the servicemember serving in compliance with military orders, and the servicemember and spouse have the same domicile in a state other than California.

For additional information or assistance in determining whether the applicant meets the MSRRA requirements, get FTB Pub. 1032.

Specific Instructions

Payee Instructions

Enter the withholding agent's name.

Enter the payee's information, including the TIN and check the appropriate TIN box.

You must provide a valid TIN as requested on this form. The following are acceptable TINs: social security number (SSN); individual taxpayer identification number (ITIN); federal employer identification number (FEIN); California corporation number (CA Corp no.); or CA SOS file number.

Private Mail Box (PMB) – Include the PMB in the address field. Write "PMB" first, then the box number. Example: 111 Main Street PMB 123.

Foreign Address – Follow the country's practice for entering the city, county, province, state, country, and postal code, as applicable, in the appropriate boxes. Do not abbreviate the country name.

Exemption Reason – Check the box that reflects the reason why the payee is exempt from the California income tax withholding requirement.

Withholding Agent Instructions

Do not send this form to the FTB. The certification on Form 590 remains valid until the payee's status changes. The withholding agent must retain a copy of the certificate or substitute for at least five years after the last payment to which the certificate applies. The agent must provide it to the FTB upon request.

The payee must notify the withholding agent if any of the following situations occur:

- The individual payee becomes a nonresident.
- The corporation ceases to have a permanent place of business in California or ceases to be qualified to do business in California.
- The partnership ceases to have a permanent place of business in California.
- The LLC ceases to have a permanent place of business in California.
- The tax-exempt entity loses its tax-exempt status.

If any of these situations occur, then withholding may be required. For more information, get Form 592, Resident and Nonresident Withholding Statement, Form 592-B, Resident and Nonresident Withholding Tax Statement, [Form 592-PTE](#), Pass-Through Entity Annual Withholding Return, Form 592-Q, Payment Voucher for Pass-Through Entity Withholding, and Form 592-V, Payment Voucher for Resident or Nonresident Withholding.

Additional Information

Website: For more information, go to ftb.ca.gov and search for **nonwage**.

MyFTB offers secure online tax account information and services. For more information, go to ftb.ca.gov and login or register for **MyFTB**.

Telephone: 888.792.4900 or 916.845.4900, Withholding Services and Compliance phone service

Fax: 916.845.9512

Mail: WITHHOLDING SERVICES AND COMPLIANCE MS F182
FRANCHISE TAX BOARD
PO BOX 942867
SACRAMENTO CA 94267-0651

For questions unrelated to withholding, or to download, view, and print California tax forms and publications, or to access the TTY/TDD numbers, see the Internet and Telephone Assistance section.

Internet and Telephone Assistance

Website: ftb.ca.gov

Telephone: 800.852.5711 from within the United States
916.845.6500 from outside the United States

TTY/TDD: 800.822.6268 for persons with hearing or speech disability
711 or 800.735.2929 California relay service

Asistencia Por Internet y Teléfono

Sitio web: ftb.ca.gov

Teléfono: 800.852.5711 dentro de los Estados Unidos
916.845.6500 fuera de los Estados Unidos

TTY/TDD: 800.822.6268 para personas con discapacidades auditivas o del habla

711 ó 800.735.2929 servicio de relevo de California

**Certification Regarding
Debarment, Suspension, and Other Responsibility Matters**

The prospective participant certifies to the best of its knowledge and belief that it and the principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
- (b) Have not within a three year period preceding this proposal been convicted of or had a civil judgement rendered against them or commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction: violation of Federal or State antitrust statute or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- (d) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.

I understand that a false statement on this certification may be grounds for rejection of this proposal or termination of the award. In addition, under 18 USC Sec. 1001, a false statement may result in a fine of up to \$10,000 or imprisonment for up to 5 years, or both.

Typed Name & Title of Authorized Representative

Signature of Authorized Representative Date

I am unable to certify to the above statements. My explanation is attached.



**CAMPAIGN CONTRIBUTIONS DISCLOSURE:
PROJECT PARTICIPANTS**

In accordance with California law, a person or entity with a financial interest in a proceeding or particular governmental decision, who is not a party but who actively supports or opposes a particular decision, qualifies as a “participant” in that proceeding for purposes of California Code of Regulations Section 84308. Participants are prohibited from contributing more than \$250 to an officer of the agency while the proceeding is pending and for 12 months thereafter. A “financial interest” in a proceeding generally means that it is reasonably foreseeable that the proceeding or governmental decision within the proceeding, will have a material financial effect (of a positive or negative nature) on one or more of your economic interests. Relevant economic interests include your interest in business entities, real property, sources of income, sources of gifts, and personal finances. A material financial effect may include a change in revenue or expenses, or it may achieve, defeat, aid, or hinder a purpose or goal of the source of income and the participant or their spouse receives or is promised the income for achieving the purpose or goal. For additional information, please consult the Fair Political Practices Commission. See [Parties, Participants, Agents, and Section 84308 \(ca.gov\)](#) and [Informal Advice \(ca.gov\)](#). A participant has both a financial interest in the proceeding and communicates with the agency or an officer of the agency for purposes of influencing the proceeding.

In addition, SCAQMD Board Members or members/alternates of the MSRC or MSRC-TAC must abstain from voting on a contract or permit if they have received a campaign contribution from a party or participant to the proceeding, or agent, totaling more than \$250 in the 12-month period prior to the consideration of the item by the Governing Board or the MSRC or MSRC-TAC.

Gov’t Code §84308(c).1

The list of current SCAQMD Governing Board Members can be found at the SCAQMD website (www.aqmd.gov). The list of current MSRC or MSRC-TAC members/alternates can be found at the MSRC website (<http://www.cleantransportationfunding.org>).

SECTION I.

Contractor (Legal Name): _____

DBA, Name _____, County Filed in _____ Corporation, ID No. _____ LLC/LLP, ID No. _____
--

List any parent, subsidiaries, or otherwise affiliated business entities of Contractor:
(See definition below).

¹ The information provided on this form does not, and is not intended to, constitute legal advice. To the extent that you may have questions regarding any case law, citations, or legal interpretations provided above please seek the guidance of your own independent counsel.

SECTION II.

Has Contractor and/or any parent, subsidiary, or affiliated company, or agent thereof, or persons who direct or control campaign contributions for these entities, made a campaign contribution(s) totaling \$250 or more in the aggregate to a current member of the South Coast Air Quality Management Governing Board or member/alternate of the MSRC or MSRC-TAC in the 12 months preceding the date of execution of this disclosure?

Yes No **If YES, complete Section II below and then sign and date the form.
If NO, sign and date below. Include this form with your submittal.**

Name(s) of Contributor(s) or Person(s) who Directed or Controlled this Contribution:

Governing Board Member or MSRC or MSRC-TAC Member/Alternate Amount of Contribution Date of Contribution

Name(s) of Contributor(s) or Person(s) who Directed or Controlled this Contribution:

Governing Board Member or MSRC or MSRC-TAC Member/Alternate Amount of Contribution Date of Contribution

Name(s) of Contributor(s) or Person(s) who Directed or Controlled this Contribution:

Governing Board Member or MSRC or MSRC-TAC Member/Alternate Amount of Contribution Date of Contribution

Name(s) of Contributor(s) or Person(s) who Directed or Controlled this Contribution:

Governing Board Member or MSRC or MSRC-TAC Member/Alternate Amount of Contribution Date of Contribution

I declare the foregoing disclosures to be true and correct.

By: _____

Title: _____

Date: _____

DEFINITIONS

Parent, Subsidiary, or Otherwise Related Business Entity (2 Cal. Code of Regs., §18703.1(d).)

- (1) Parent subsidiary. A parent subsidiary relationship exists when one corporation directly or indirectly owns shares possessing more than 50 percent of the voting power of another corporation.
- (2) Otherwise related business entity. Business entities, including corporations, partnerships, joint ventures and any other organizations and enterprises operated for profit, which do not have a parent subsidiary relationship are otherwise related if any one of the following three tests is met:
 - (A) One business entity has a controlling ownership interest in the other business entity.
 - (B) There is shared management and control between the entities. In determining whether there is shared management and control, consideration should be given to the following factors:
 - (i) The same person or substantially the same person owns and manages the two entities;
 - (ii) There are common or commingled funds or assets;
 - (iii) The business entities share the use of the same offices or employees, or otherwise share activities, resources or personnel on a regular basis;
 - (iv) There is otherwise a regular and close working relationship between the entities; or
 - (C) A controlling owner (50% or greater interest as a shareholder or as a general partner) in one entity also is a controlling owner in the other entity.

ATTACHMENT C



South Coast Air Quality Management District



21865 Copley Drive, Diamond Bar, CA 91765-4178
(909) 396-2000 • www.aqmd.gov

South Coast AQMD's State Legislative Guiding Principles for 2026

The following guiding principles are identified to protect public health, facilitate attainment of state and federal clean air standards within the South Coast region by statutory deadlines and address other South Coast AQMD needs and policy priorities, while working with and serving as a resource to state legislators and the Governor; state and local agencies; and business, environmental, health, community, and other stakeholders.

Air Quality Funding

Protect and increase existing and identify new funding sources that provide sustainable revenue streams for South Coast AQMD programs and priorities. These funds should support attainment of state and federal ambient air quality standards and reduce toxic air contaminants to protect public health, with a focus on achieving equitable clean air for disproportionately impacted communities. Ensure sufficient administrative and implementation funding to allow the effective execution of clean air programs, projects and overall efforts.

South Coast AQMD Authority / Policy Implementation

Defend and ensure adequate South Coast AQMD authority to raise revenue and impose fees as needed and implement the Board's clean air policies and programs, including those required by state and federal laws, to support Air Quality Management Plans (AQMPs), State Implementation Plans, and Letters of Commitment with U.S. EPA and CARB.

State Support

Ensure that the State does not impose unfunded mandates on South Coast AQMD and does its fair share to reduce air pollution within the South Coast region. State actions needed in support of air quality include, but are not limited to, funding, legislation, regulatory actions, and support by the Administration. In particular, South Coast AQMD requires State action to: 1) Facilitate implementation of applicable South Coast AQMD AQMPs to attain federal ozone and particulate matter air quality standards in accordance with deadlines; 2) Ensure there are sufficient resources to fully implement air district responsibilities and initiatives created through the AB 617 Program; and 3) Maximize funding opportunities from the federal government to the State through public laws, such as the Bipartisan Infrastructure Law and Inflation Reduction Act.

Surface Transportation & Goods Movement

Support and expand policy and funding that promotes air quality priorities as part of the implementation of state and federal surface transportation, infrastructure and goods movement policies and programs, with an emphasis on the development and deployment of the cleanest technologies for medium- and heavy-duty trucks, locomotives, oceangoing vessels, aircraft, and off-road equipment, and a priority for zero-emission

technology where commercially viable at scale.

Development and Deployment of Clean Technology

Support and advocate for legislative and administrative policies, programs, and funding, that promote the development and deployment of the cleanest commercially available technologies with prioritization for zero-emission infrastructure, equipment, and vehicles to: 1) protect public health; 2) facilitate attainment of clean air standards; and/or 3) support a healthy economy and promote job retention/creation within the South Coast region.

Impacted Communities

Support and advocate for legislative and administrative policies and funding that: 1) promote and sustain environmental justice initiatives which reduce localized health risks resulting from criteria pollutant and toxic air contaminant emissions; 2) prioritize equitable access to zero-emission or cleanest available technologies for over-burdened communities; 3) enhance community participation in decision-making; and 4) provide the resources necessary to fully implement local air districts' responsibilities and initiatives created through the AB 617 Community Air Protection Program, including implementing CARB's blueprint to expand the program to address communities that have been consistently nominated.

Climate Change

Support efforts directing that the Greenhouse Gas Reduction Fund provide funding to maximize criteria pollutant and toxic emission reduction co-benefits that facilitate attainment of clean air standards and reduce public health impacts in the South Coast region, including through the development and deployment of zero-emission or cleanest commercially available vehicles, equipment, and fueling/charging infrastructure, especially as it relates to mobile sources such as medium- and heavy-duty trucks, locomotives, oceangoing vessels, aircraft, and off-road equipment.

Clean Energy

Support legislative and administrative efforts to promote energy efficiency, demand reduction, and reliable, cost effective and clean energy in the South Coast region, especially in disproportionately impacted environmental justice communities. Also, support production and development of renewable and alternative energy, energy storage, and microgrids to reduce emissions from transportation and other sources, such as back-up generators.

Business, Job Creation, Workforce Training & Economy

Support legislative policies and administrative actions that promote job retention and creation, workforce training for zero-emission technologies, as well as economic growth, while working toward attainment of clean air standards; and that support and assist the regulated community in complying with rules and regulations in the most efficient and cost-effective manner. Work to ensure job and economic benefits are equitably accessible to environmental justice communities.

Addressing Impacts of Natural and Manmade Events

Support and advocate for legislative and administrative policies, programs, and funding that reduce and/or mitigate air quality-related public health impacts within the South Coast region caused by wildfires, dust/sandstorms, odors, or other events.

Administrative Operations

Support and seek legislative and administrative policies, programs, funding and/or actions that ensure that South Coast AQMD can meet its administrative and operational needs, including, but not limited to, those related to human resources and pensions.

South Coast Air Quality Management District
Legislative Analysis Summary – AB 1661 (Bryan)
Version: Introduced - 1/29/2026
Analyst: EV

AB 1661 (Bryan)

Oil and gas: low-production wells: Baldwin Hills Conservancy: Equitable Community Repair and Reinvestment Account.

Summary: This bill would require the Department of Conservation, upon legislative appropriation, to allocate the first \$5 million in penalty monies deposited into the Equitable Community Repair and Reinvestment Account to Los Angeles County for distribution as direct cash assistance to families living within 2.5 miles of identified low-production wells whose children have respiratory health conditions.

Background: AB 2716 (Bryan), enacted in 2024, addresses environmental impacts on communities near low-producing and idle oil wells. The chaptered bill:

- Requires the Geologic Energy Management Division, by March 1, 2025, to identify all low-production wells in Los Angeles County located in oil fields adjacent to state parks or recreation areas and within the Baldwin Hills Conservancy.
- Beginning March 1, 2026, requires wells in low-production status for more than 12 months to be plugged and abandoned, and imposes an administrative penalty of \$10,000 per month for noncompliance.
- Directs all wells in Los Angeles County that are in oil fields adjacent to state parks or recreation areas and within the Baldwin Hills Conservancy to be plugged and abandoned by December 31, 2030, and imposes a \$10,000 per month penalty for failure to comply.
- Establishes the Equitable Community Repair and Reinvestment Account and directs that penalty revenues be deposited into the account to be made available for projects benefiting communities within 2.5 miles of identified oil wells.

The bill was supported by more than 60 environmental, environmental justice, and public health organizations.

Status: 2/17/26: Referred to Assembly Natural Resources Committee. Hearing: 4/6/26 - Assembly Natural Resources Committee.

Specific Provisions: AB 1661 (Bryan) would make clarifying amendments to its predecessor AB 2716 (Bryan) regarding the use and expenditure of penalty funds. Specifically, the bill would require the Department of Conservation, upon appropriation by the Legislature, to allocate the first \$5 million in penalty revenues to be deposited in the Equitable Community Repair and Reinvestment Account. The County of Los Angeles would then distribute these funds as direct cash assistance to families living within 2.5 miles of identified low-production wells whose children have respiratory health conditions.

Additionally, after all eligible families receive assistance, and subject to appropriation by the Legislature, Los County may use funds to support community benefit projects within the same 2.5 miles area including park creation and maintenance, urban greening, affordable housing, climate mitigation and resilience, and community benefit projects with environmental co-benefits.

Impacts on South Coast AQMD’s Mission, Operations or Initiatives: The Inglewood Oil Field was one of the largest and longest-producing urban oil fields in the United States. Its proximity to homes and schools has raised longstanding concerns about air quality impacts and public health impacts on nearby communities such as Culver City, Baldwin Hills, and Inglewood.

In 2023, a settlement between Culver City and Sentinel Peak Resources was executed to establish a binding schedule to phase out oil operations and plug and abandon wells in the Culver City portion of the Inglewood Oil Field. This action settled disputes related to Culver City’s 2021 Oil Termination ordinance. Los Angeles County also adopted an ordinance in 2023, which bans new oil wells and production facilities and requires existing operations in unincorporated areas to be phased out over approximately 20 years.

AB 1661 amends existing state law to ensure eligible families living adjacent to the Inglewood Oil Field receive direct assistance from the first \$5 million of penalty fees in the Equitable Community Repair and Reinvestment Account. It further clarifies that these eligible families must be compensated before these penalty fees are utilized for specified community benefit projects.

South Coast AQMD received complaints from community members related to the Inglewood Oil Field and participated in the Los Angeles County led Community Advisory Panel meetings to address resident concerns. AB 1661 is consistent with South Coast AQMD’s broader environmental justice and public health objectives, including alignment with the South Los Angeles Community Air Protection Program (AB 617) and Inglewood is a Consistently Nominated Community. The bill would ensure that direct assistance is provided to residents who have experienced disproportionate, localized air quality impacts.

Recommended Position: SUPPORT

SUPPORT

N/A

OPPOSITION

N/A

ASSEMBLY BILL

No. 1661

Introduced by Assembly Member Bryan

January 29, 2026

An act to amend Section 3206.1.5 of the Public Resources Code, relating to oil and gas.

LEGISLATIVE COUNSEL'S DIGEST

AB 1661, as introduced, Bryan. Oil and gas: low-production wells: Baldwin Hills Conservancy: Equitable Community Repair and Reinvestment Account.

Existing law requires the Geologic Energy Management Division in the Department of Conservation, on or before March 1, 2025, to identify all low-production wells, as defined, that are located in the County of Los Angeles in an oil field that is adjacent to a state recreation area or state park and is located, in whole or in part, within the boundary of the Baldwin Hills Conservancy, as provided. Existing law prohibits, commencing March 1, 2026, the owners of those wells from allowing those wells to be low-production wells for more than 12 months. Upon a violation of that prohibition, existing law requires the State Oil and Gas Supervisor to charge an administrative penalty of \$10,000 per month to the low-production well owner, until the low-production well is plugged and abandoned, as provided.

Existing law requires the plugging and abandoning of all wells located in the County of Los Angeles in an oil field that is adjacent to a state recreation area or state park and is located, in whole or in part, within the boundary of the Baldwin Hills Conservancy by December 31, 2030. Existing law requires the supervisor, on and after January 1, 2031, to charge the owner of a well an administrative penalty of \$10,000 per

month for a violation of that requirement, until the well is plugged and abandoned.

Existing law establishes the Equitable Community Repair and Reinvestment Account, requires the above-described administrative penalties to be deposited into the account, and makes the funds from the account available, upon appropriation by the Legislature, to the Department of Conservation for allocation to the County of Los Angeles for projects that benefit communities living within 2½ miles of the identified low-production wells, as provided.

This bill would require the Department of Conservation, upon appropriation by the Legislature and subject to the terms of the appropriation, to distribute the first \$5,000,000 deposited into the Equitable Community Repair and Reinvestment Account to be allocated to the County of Los Angeles to disburse in direct cash assistance to families living within 2½ miles of the identified low production wells whose children have respiratory health conditions.

Vote: majority. Appropriation: no. Fiscal committee: yes.
State-mandated local program: no.

The people of the State of California do enact as follows:

1 SECTION 1. Section 3206.1.5 of the Public Resources Code
2 is amended to read:

3 3206.1.5. (a) On or before March 1, 2025, the division shall
4 identify all low-production wells that are located in a county of
5 the first class in an oil field that is adjacent to a state recreation
6 area or state park and is located, in whole or in part, within the
7 boundary of the Baldwin Hills Conservancy. The division shall
8 determine the length of time those low-production wells have
9 continuously been low-production wells. The division shall
10 consider whether and for how long a well was shut-in for
11 maintenance and subtract that from the calculation of the length
12 of time a well meets the definition of a low-production well.

13 (b) On or before March 1, 2026, the division shall notify the
14 owners of low-production wells identified in subdivision (a) of
15 the prohibition on operating a low-production well for more than
16 12 months, as described in subdivision (c).

17 (c) Commencing March 1, 2026, a well identified pursuant to
18 subdivision (a) shall not be a low-production well for more than
19 12 months.

1 (d) The supervisor shall charge an administrative penalty of ten
2 thousand dollars (\$10,000) per month to a low-production well
3 owner in violation of subdivision (c) until the low-production well
4 is plugged and abandoned pursuant to Section 3208. Penalties shall
5 be remitted annually on a schedule determined by the supervisor.
6 The low-production well site shall not be required to be remediated
7 until oil and gas operations cease.

8 (e) The division shall waive the penalty in subdivision (d) on a
9 low-production well when the owner submits a request for approval
10 of a notice of intention pursuant to Section 3203 to plug and
11 abandon the well. If work to plug and abandon the well does not
12 start before the notice of intention expires, the division shall resume
13 assessing the penalty on the well owner. A well owner who has
14 an approved notice of intention to plug and abandon a well in
15 accordance with Section 3208 shall not apply for approval of
16 another notice of intention to plug and abandon the same well in
17 a two-year period unless the supervisor determines that the well
18 poses a present danger to life, health, or natural resources.

19 (f) (1) All funds collected pursuant to this section shall be
20 deposited into the Equitable Community Repair and Reinvestment
21 Account, which is hereby created in the State Treasury as a special
22 fund administered by the Department of Conservation.

23 (2) Funds from the account shall be available, upon
24 appropriation by the Legislature, to the Department of Conservation
25 for allocation to a county of the first class. ~~The~~

26 (3) *The Department of Conservation shall, upon appropriation*
27 *by the Legislature and subject to the terms of the appropriation,*
28 *distribute the first five million dollars (\$5,000,000) deposited into*
29 *the account to the county to disburse in direct cash assistance to*
30 *families living within two and one-half miles of the oil wells*
31 *identified in subdivision (a) who have children with respiratory*
32 *health conditions.*

33 (4) ~~The county may~~ *may*, upon appropriation by the Legislature
34 and subject to the terms of the appropriation, contract with entities
35 within its jurisdiction, including, but not limited to, cities, state
36 conservancies, joint powers authorities, and nonprofit organizations
37 to use the funds for projects listed in subparagraphs (A) to (E),
38 inclusive, to the extent that these projects benefit communities
39 living within two and one-half miles of the oil wells identified in
40 subdivision (a). *The projects listed in subparagraphs (A) to (E),*

1 *inclusive, shall not receive funding until the funds reserved*
2 *pursuant to paragraph (3) have been distributed.*

3 (A) Park creation or expansion and maintenance of new outdoor
4 amenities in park-poor neighborhoods.

5 (B) Urban greening.

6 (C) Affordable housing needed to accommodate community
7 needs.

8 (D) Climate mitigation and resilience.

9 (E) Community benefit projects with environmental cobenefits.

10 ~~(3)~~

11 (5) (A) The Legislature shall not allow the account balance to
12 exceed twenty million dollars (\$20,000,000).

13 (B) Until December 31, 2030, the Legislature shall not allow
14 the account balance to exceed ten million dollars (\$10,000,000)
15 once 50 percent of all wells that meet the conditions specified in
16 subdivision (a) have been plugged and abandoned.

17 (C) Commencing January 1, 2031, the Legislature shall not
18 allow the account balance to exceed ten million dollars
19 (\$10,000,000) once 50 percent of all wells that meet the conditions
20 specified in paragraph (1) of subdivision (g) have been plugged
21 and abandoned.

22 (g) (1) All wells, as defined in subdivision (a) of Section 3008,
23 that are located in a county of the first class in an oil field that is
24 adjacent to a state recreation area or state park and is located, in
25 whole or in part, within the boundary of the Baldwin Hills
26 Conservancy shall be plugged and abandoned by December 31,
27 2030.

28 (2) An owner of an idle well or long-term idle well that is
29 located in a county of the first class in an oil field that is adjacent
30 to a state recreation area or state park and is located, in whole or
31 in part, within the boundary of the Baldwin Hills Conservancy
32 may adjust the terms of an idle well management plan required
33 pursuant to Section 3206, as needed, to accomplish the plugging
34 and abandonment of those covered wells by December 31, 2030.

35 (3) (A) On and after January 1, 2031, the supervisor shall charge
36 an administrative penalty of ten thousand dollars (\$10,000) per
37 month to a well owner in violation of paragraph (1) until the well
38 is plugged and abandoned pursuant to Section 3208.

39 (B) The supervisor shall not charge an administrative penalty
40 pursuant to subparagraph (A) for a violation by a well owner if

- 1 the supervisor has already charged an administrative penalty to
- 2 that well owner for a violation, applicable to the same well and
- 3 covering the same time period, pursuant to subdivision (d).

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South Coast Air Quality Management District
Legislative Analysis Summary – AB 2175 (Garcia)
Version: Introduced - 2/19/2026
Analyst: MC

AB 2175 (Garcia) Community Microgrids

Summary: AB 2175 clarifies the definition of an “electrical corporation” under Public Utilities Code Section 218 to ensure that microgrids and distributed energy systems serving commercial and industrial parks, business campuses, agricultural operations, and other multi-tenant non-residential properties are not unintentionally regulated as public utilities.

The bill also clarifies that sub-metered energy systems in multifamily housing and multi-meter properties across a wide variety of sectors and applications are not electrical corporations when electricity is generated and distributed primarily for on-site use.

By removing regulatory ambiguity, AB 2175 will support the deployment of local energy systems while maintaining appropriate California Public Utilities Commission (CPUC) safety and interconnection oversight.

The author is also working with the Assembly Energy Committee to address issues related to California’s “over-the-fence” rule.

Background: Microgrids are interconnected energy systems that coordinate local electricity generation and loads and can operate alongside or independently from the larger grid. They often combine distributed energy resources such as solar generation and battery storage to improve reliability and reduce strain on the broader electrical system.

These systems are increasingly being deployed to serve commercial and industrial campuses, business parks, agricultural facilities, and other multi-tenant properties where electricity is generated and shared across multiple meters or buildings. Similar systems are also emerging in multifamily housing, where submetering is used to allocate energy costs among residents.

However, outdated statutory language has created uncertainty about whether these localized systems could be classified as “electrical corporations” under Public Utilities Code Section 218, which would subject them to regulatory requirements intended for large utilities.

This bill is designed to modify the “over-the-fence” rule. In California, the “over-the-fence” rule generally limits the ability of a private generator to sell electricity directly to neighboring properties. Under existing law, electricity generated on-site can typically only be used by the generator itself or, in limited cases, sold to a small number of adjacent properties under strict conditions. If electricity is transmitted beyond those limited allowances, the provider may be considered an “electrical corporation” and subject CPUC regulatory requirements.

Given the potential for significant policy changes through forthcoming amendments, we recommend engaging with the author and committee staff early to ensure South Coast AQMD is part of the conversation and can help shape any proposed changes. This will be important to assess potential impacts on air quality, electrification efforts, and distributed energy resources.

Status: 3/09/2026 Rereferred to Assembly Committee on Utilities and Energy.

Specific Provisions: Under current law, systems that distribute electricity across property lines, serve multiple meters, or use submetering may risk classification as electrical corporations. This creates barriers for:

- Commercial and industrial campus microgrids and multi-building developments.
- Agricultural and multi-meter facilities.
- Multifamily housing developments using submetering.

As a result, projects face regulatory uncertainty, delays, and higher costs, slowing deployment of distributed energy systems that could improve reliability and lower energy costs.

The author is also working with the Assembly Energy Committee on California’s “over-the-fence” rule, which limits the ability of private generators to sell or transfer electricity directly to neighboring properties without being regulated as a public utility.

This issue is being addressed in Assemblymember Carrillo’s AB 2239, indicating broader legislative interest in revisiting these restrictions. Given the likelihood of substantive amendments and overlapping policy efforts, it will be important to engage with both authors and committee staff to ensure South Coast AQMD is part of the conversation as the bills evolve.

Pending official bill language from author on AB 2175.

Impacts on South Coast AQMD’s Mission, Operations or Initiatives: AB 2175 is expected to be amended to address California’s “over-the-fence” rule, which limits the ability of private generators to sell or transfer electricity directly to neighboring properties without being regulated as a public utility. South Coast AQMD will advocate for the bill to expand opportunities for on-site generation and energy sharing across adjacent properties, potentially accelerating the deployment of distributed energy resources in the South Coast region.

Staff will continue to monitor both AB 2175 and AB 2239 (Carillo) closely as they move through the legislative process and will report back to the Committee with updates and recommendations as necessary.

Recommended Position: WORK WITH AUTHOR

SUPPORT

N/A

OPPOSITION

N/A

ASSEMBLY BILL

No. 2175

Introduced by Assembly Member Garcia

February 19, 2026

An act to amend Section 8360 of the Public Utilities Code, relating to electricity.

LEGISLATIVE COUNSEL'S DIGEST

AB 2175, as introduced, Garcia. Electricity: electrical transmission and distribution systems.

Existing law establishes the policy of the state to modernize the state's electrical transmission and distribution system to maintain safe, reliable, efficient, and secure electrical service, with infrastructure that can meet future growth in demand and achieve certain objectives, including the deployment and integration of cost-effective advanced electricity storage and peak-shaving technologies, as specified. Existing law requires the Public Utilities Commission, in consultation with certain entities, to determine the requirements for a smart grid deployment plan consistent with that policy and federal law, as specified.

This bill would repeal from those policy objectives the deployment and integration of cost-effective advanced electricity storage and peak-shaving technologies.

Vote: majority. Appropriation: no. Fiscal committee: yes. State-mandated local program: no.

The people of the State of California do enact as follows:

- 1 SECTION 1. Section 8360 of the Public Utilities Code is
- 2 amended to read:

1 8360. It is the policy of the state to modernize the state's
2 electrical transmission and distribution system to maintain safe,
3 reliable, efficient, and secure electrical service, with infrastructure
4 that can meet future growth in demand and achieve all of the
5 following, which together characterize a smart grid:

6 (a) Increased use of cost-effective digital information and control
7 technology to improve reliability, security, and efficiency of the
8 ~~electric~~ *electrical* grid.

9 (b) Dynamic optimization of grid operations and resources,
10 including appropriate consideration for asset management and
11 utilization of related grid operations and resources, with
12 cost-effective full cyber security.

13 (c) Deployment and integration of cost-effective distributed
14 resources and generation, including renewable resources.

15 (d) Development and incorporation of cost-effective demand
16 response, demand-side resources, and energy-efficient resources.

17 (e) Deployment of cost-effective smart technologies, including
18 real time, automated, interactive technologies that optimize the
19 physical operation of appliances and consumer devices for
20 metering, communications concerning grid operations and status,
21 and distribution automation.

22 (f) Integration of cost-effective smart appliances and consumer
23 devices.

24 ~~(g) Deployment and integration of cost-effective advanced~~
25 ~~electricity storage and peak-shaving technologies, including plug-in~~
26 ~~electric and hybrid electric vehicles, and thermal-storage~~
27 ~~air-conditioning.~~

28 ~~(h)~~

29 (g) Provide consumers with timely information and control
30 options.

31 ~~(i)~~

32 (h) Develop standards for communication and interoperability
33 of appliances and equipment connected to the ~~electric~~ *electrical*
34 grid, including the infrastructure serving the grid.

35 ~~(j)~~

36 (i) Identification and lowering of unreasonable or unnecessary
37 barriers to adoption of smart grid technologies, practices, and
38 services.

South Coast Air Quality Management District
Legislative Analysis Summary – AB 2239 (Carillo)
Version: As introduced – 4/1/2026
Analyst: MC/PC

AB 2239 (Carillo)

Infrastructure – constrained energization areas: energization timelines: environmental review

Summary: Assembly Bill 2239 aims to accelerate timely energization in areas with infrastructure constraints.

Background: Certain areas within California face unique challenges in expanding electric infrastructure to meet energization timelines. While electrical corporations have an obligation to serve, cities and developers often face timelines of three to four years for energization. Despite significant generation capacity, local projects experience multiyear delays due to constrained substations, limited distribution circuits, transformer shortages, interconnection delays, and lengthy transmission upgrade timelines.

Existing law vests the Public Utilities Commission (PUC) with regulatory authority over public utilities, including electrical corporations and existing law requires the PUC to establish reasonable average and maximum target energization time periods, as defined, and a procedure for customers to report energization delays to the PUC, as provided. Additionally, the PUC requires that an electrical corporation take remedial actions necessary to achieve the PUC's targets.

The California Environmental Quality Act (CEQA) requires a Lead Agency to prepare and certify an environmental impact report on a proposed project that may have a significant effect on the environment or to adopt a negative declaration if it finds that the project will not have that effect. CEQA also requires a Lead Agency to prepare a mitigated negative declaration for a project that may have a significant effect on the environment if revisions in the project would avoid or mitigate that effect and there is no substantial evidence that the project, as revised, would have a significant effect on the environment.

This bill would exempt from the requirements of CEQA, the approval of an electrical generation or energy storage project located within an infrastructure-constrained energization area if specific conditions are met, as provided.

Status: 3/9/26: Referred to the Committee on Utilities and Energy & Natural Resources

Specific Provisions: AB 2239 defines infrastructure constrained energization areas and strengthens electrification accountability by amending California Public Utilities Code Section 934 to establish clearer energization timelines, require transparency and reporting when deadlines are missed, and allow local jurisdictions to provide input.

The bill also creates an over-the-fence electrification pathway in constrained areas by allowing permitting of adjacent generation to serve nearby parcels when utilities cannot energize within a reasonable timeframe, while maintaining oversight and safety standards from the California Public Utilities Commission.

In addition, it prioritizes infrastructure constrained growth areas by encouraging coordinated siting and infrastructure planning in regions and promotes coordination with CAISO to prioritize transmission upgrades where economic growth and reliability needs are demonstrated.

Impacts on South Coast AQMD’s Mission, Operations or Initiatives: Under this bill, the Public Utilities Commission (PUC) requires each electrical corporation to meet energization timelines or targets – and will penalize electric companies who fail to meet these timelines or targets. The bill provides instruction for electrical corporations to meet these goals that could result in penalties for those who do not meet the requirements. However, the bill changes current permitting laws, including CEQA exemptions, by expediting review and prioritizations projects in newly designed infrastructure-constrained energization areas. CEQA is critical because it provides public disclosure on projects to inform communities and stakeholders such as South Coast AQMD.

South Coast AQMD supports legislation efforts to promote energy efficiency, demand reduction, and reliable, cost effective and clean energy in the South Coast region, especially in disproportionately impacted environmental justice communities. Additionally, South Coast AQMD supports the production and development of renewable and alternative energy, energy storage, and microgrids to reduce emissions from transportation and other sources, such as back-up generators. However, the agency also prioritizes zero-emission infrastructure, equipment, and vehicles to: 1) protect public health; 2) facilitate attainment of clean air standards; and/or 3) support a healthy economy and promote job retention/creation within the South Coast region.

This is one of two bills – AB 2239 (Carillo) and AB 2175 (Garcia) – that address similar issues. The Assembly Energy Committee is currently working with both authors and is expected to hold hearings on these issues. Staff will continue to engage with Assemblymembers Carillo and Garcia as well as the Committee and will report back with updates and recommendations.

Recommended Position: WORK WITH AUTHOR

SUPPORT

N/A

OPPOSITION

N/A

ASSEMBLY BILL

No. 2239

Introduced by Assembly Member Carrillo

February 19, 2026

An act to add Section 21080.74 to the Public Resources Code, and to add Sections 348.5, 367.8, and 934.5 to the Public Utilities Code, relating to electricity.

LEGISLATIVE COUNSEL'S DIGEST

AB 2239, as introduced, Carrillo. Infrastructure-constrained energization areas: energization timelines: environmental review.

Existing law vests the Public Utilities Commission (PUC) with regulatory authority over public utilities, including electrical corporations. Existing law requires the PUC to establish reasonable average and maximum target energization time periods, as defined, and a procedure for customers to report energization delays to the PUC, as provided. Existing law requires the PUC to require an electrical corporation to take remedial actions necessary to achieve the PUC's targets.

This bill would require the PUC to require each electrical corporation to meet energization timelines or targets established pursuant to the above-described provisions or by PUC order. The bill would require the PUC to impose a penalty if an electrical corporation fails to meet an energization timeline or target approved or required by the PUC, as provided.

This bill would require the PUC to designate an infrastructure-constrained energization area based on objective criteria, including limited distribution or transmission infrastructure relative to available electrical capacity or projected load growth, inland or desert

geography, and extended energization timelines. The bill would require the PUC to adopt rules authorizing over-the-fence transactions within infrastructure-constrained energization areas when an electrical corporation cannot reasonably meet energization targets and other specific conditions are met, as specified. The bill would require the PUC, in coordination with the State Energy Resources Conservation and Development Commission (Energy Commission) and local jurisdictions, to establish procedures to facilitate expedited development of electrical generation and energy storage facilities in infrastructure-constrained energization areas, as specified. The bill would require the PUC, in coordination with the Energy Commission, the Office of Land Use and Climate Innovation, and local jurisdictions, to establish procedures to facilitate expedited permitting, siting, and construction of electrical infrastructure owned or operated by an electrical corporation within infrastructure-constrained energization areas, as specified. The bill would require the PUC and the Energy Commission to coordinate with, and advocate before, the Independent System Operator (ISO) for expedited review and prioritization of projects in infrastructure-constrained energization areas, as specified.

Existing law establishes the ISO as a nonprofit, public benefit corporation to ensure efficient use and reliable operation of the transmission grid and to manage the transmission grid and related energy markets, as specified.

This bill would require the ISO to consider regional economic development needs, infrastructure constraints, and statewide policy objectives when conducting transmission planning and interconnection processes. The bill would require the ISO seek to streamline review and approval processes for projects located within infrastructure-constrained energization areas, as specified, and would require the ISO to annually report to the PUC and the Legislature on transmission and interconnection constraints affecting infrastructure-constrained energization areas.

The California Environmental Quality Act (CEQA) requires a lead agency, as defined, to prepare, or cause to be prepared, and certify the completion of an environmental impact report on a project that it proposes to carry out or approve that may have a significant effect on the environment or to adopt a negative declaration if it finds that the project will not have that effect. CEQA also requires a lead agency to prepare a mitigated negative declaration for a project that may have a significant effect on the environment if revisions in the project would

avoid or mitigate that effect and there is no substantial evidence that the project, as revised, would have a significant effect on the environment.

This bill would exempt from the requirements of CEQA the approval of an electrical generation or energy storage project located within an infrastructure-constrained energization area if specific conditions are met, as provided. The bill would require the Office of Land Use and Climate Innovation to develop guidelines for the implementation of these provisions. Because a lead agency would be required to determine whether a project would qualify for this exemption, this bill would impose a state-mandated local program.

Under existing law, a violation of the Public Utilities Act or any order, decision, rule, direction, demand, or requirement of the PUC is a crime.

Because certain of the above-described provisions would be part of the act and a violation of a PUC action implementing the above-described provisions would be a crime, this bill would impose a state-mandated local program.

The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement.

This bill would provide that no reimbursement is required by this act for specified reasons.

Vote: majority. Appropriation: no. Fiscal committee: yes.

State-mandated local program: yes.

The people of the State of California do enact as follows:

1 SECTION 1. (a) The Legislature finds and declares all of the
2 following:

3 (1) Timely energization of customers is essential to achieving
4 California’s goals related to economic development, housing
5 production, industrial growth, public health, reliability, and the
6 reduction of greenhouse gas emissions.

7 (2) Certain regions of California possess substantial existing or
8 planned electrical generation capacity, renewable energy potential,
9 or available land suitable for economic and housing development
10 but lack sufficient transmission or distribution infrastructure to
11 deliver electrical service in a timely manner.

12 (3) These resource-rich but infrastructure-constrained regions
13 include inland, desert, rural, and geographically isolated areas

1 experiencing rapid growth in logistics, manufacturing, data
2 infrastructure, housing, and clean energy development.

3 (4) Delays in energization in these regions result in lost
4 economic opportunity, delayed housing production, increased
5 project costs, and reduced statewide economic competitiveness.

6 (5) Permitting complexity, multiagency review processes, and
7 infrastructure planning timelines can delay electrical infrastructure
8 necessary to support energization and economic development.

9 (6) Existing law does not sufficiently incentivize electrical
10 corporations to meet energization timelines established or approved
11 by the Public Utilities Commission, nor does it sufficiently provide
12 tools to accelerate infrastructure deployment in
13 infrastructure-constrained areas.

14 (7) Local governments bear primary responsibility for land use
15 planning, permitting, housing development, and economic
16 development and therefore should have a meaningful role in
17 establishing and evaluating energization timelines affecting their
18 jurisdictions.

19 (8) When an electrical corporation cannot meet required
20 energization timelines despite expedited infrastructure development
21 efforts, alternative energization pathways, including customer-side
22 or third-party infrastructure and over-the-fence transactions, may
23 be necessary to ensure timely access to electrical service while
24 maintaining safety and reliability standards.

25 (9) Transmission and interconnection delays in
26 infrastructure-constrained regions constrain economic growth,
27 housing production, and clean energy deployment, and coordinated
28 prioritization among state entities is necessary to advance statewide
29 policy goals.

30 (10) Development of firm, dispatchable, renewable, and
31 low-emission generation resources, including geothermal energy,
32 hydrogen-based generation, advanced nuclear technologies, energy
33 storage, and renewable generation, may improve reliability and
34 support energization in infrastructure-constrained regions.

35 (b) It is the intent of the Legislature that electrical corporations
36 remain the primary providers of electrical service and that state
37 policy should prioritize enabling electrical corporations to provide
38 timely service through expedited planning, permitting, and
39 infrastructure development.

1 SEC. 2. Section 21080.74 is added to the Public Resources
2 Code, to read:

3 21080.74. (a) This division does not apply to the approval of
4 an electrical generation or energy storage project located within
5 an infrastructure-constrained energization area if all of the
6 following conditions are met:

7 (1) The project has a generating capacity of not more than 100
8 megawatts.

9 (2) The project is located on industrially zoned, commercial, or
10 previously disturbed land.

11 (3) The project does not result in significant impacts to sensitive
12 biological resources, cultural resources, or protected habitat, as
13 determined by the lead agency.

14 (4) The project is not located within a state park, wilderness
15 area, or unit of the national park system.

16 (5) The project consists of renewable generation, energy storage,
17 hydrogen production or generation, geothermal facilities, or
18 advanced nuclear generation meeting applicable licensing
19 requirements.

20 (b) A lead agency may require reasonable mitigation measures
21 to address site-specific impacts.

22 (c) The Office of Land Use and Climate Innovation shall develop
23 guidelines for the implementation of this section.

24 (d) For purposes of this section, “infrastructure-constrained
25 energization area” means an area designated by the Public Utilities
26 Commission pursuant to subdivision (a) of Section 367.8 of the
27 Public Utilities Code.

28 SEC. 3. Section 348.5 is added to the Public Utilities Code, to
29 read:

30 348.5. (a) The Independent System Operator shall, consistent
31 with federal law and its federally approved tariff, consider regional
32 economic development needs, infrastructure constraints, and
33 statewide policy objectives when conducting transmission planning
34 and interconnection processes.

35 (b) The Independent System Operator shall seek to streamline
36 review and approval processes for projects located within
37 infrastructure-constrained energization areas, including prioritizing
38 studies and identifying transmission upgrades that reduce
39 energization delays.

1 (c) The Independent System Operator shall annually report to
 2 the commission and the Legislature, consistent with Section 9795
 3 of the Government Code, on transmission and interconnection
 4 constraints affecting infrastructure-constrained energization areas.
 5 (d) This section does not modify the federal jurisdiction or
 6 operational independence of the Independent System Operator.
 7 (e) For purposes of this section, “infrastructure-constrained
 8 energization area” means an area designated by the commission
 9 pursuant to subdivision (a) of Section 367.8.
 10 SEC. 4. Section 367.8 is added to the Public Utilities Code, to
 11 read:
 12 367.8. (a) The commission shall designate an
 13 infrastructure-constrained energization area based on objective
 14 criteria, including, but not limited to, limited distribution or
 15 transmission infrastructure relative to available electrical capacity
 16 or projected load growth, inland or desert geography, and extended
 17 energization timelines.
 18 (b) (1) The commission shall adopt rules authorizing
 19 over-the-fence transactions within infrastructure-constrained
 20 energization areas designated pursuant to subdivision (a) when an
 21 electrical corporation cannot reasonably meet the energization
 22 targets established pursuant to Section 934, or a commission order,
 23 and all of the following conditions are met:
 24 (A) The receiving parcels are contiguous or directly adjacent
 25 to the generating parcel.
 26 (B) The aggregate load served does not exceed 10 megawatts.
 27 (C) The arrangement complies with applicable safety, reliability,
 28 and interconnection standards.
 29 (D) Electrical corporation distribution facilities are not used for
 30 retail delivery, except as authorized for safety or reliability.
 31 (2) An entity providing electrical service pursuant to this section
 32 shall not, solely by reason of the over-the-fence transaction
 33 authorized under this section, be deemed an electrical corporation
 34 or a public utility.
 35 (3) This section does not require utility ownership or ratebasing
 36 of an alternative facility.
 37 (4) For purposes of this subdivision, “over-the-fence transaction”
 38 means the provision of electrical service from a generating facility
 39 or electrical infrastructure located on one parcel to one or more

1 immediately adjacent parcels without the use of an electrical
2 corporation's distribution system.

3 (c) (1) The commission, in coordination with the Energy
4 Commission and local jurisdictions, shall establish procedures to
5 facilitate expedited development of electrical generation and energy
6 storage facilities in infrastructure-constrained energization areas
7 designated pursuant to subdivision (a).

8 (2) Projects eligible for expedited development pursuant to
9 paragraph (1) may include, but are not limited to, all of the
10 following:

11 (A) Renewable electrical generation, including solar
12 photovoltaic, wind, and geothermal generation.

13 (B) Energy storage systems.

14 (C) Hydrogen production facilities and hydrogen-fueled
15 generation.

16 (D) Advanced nuclear technologies, including small modular
17 reactors, consistent with applicable federal and state law.

18 (E) Firm, dispatchable, or low-emission generation technologies
19 that support reliability and energization.

20 (3) The commission and the Energy Commission shall prioritize
21 projects that reduce energization delays, use previously disturbed
22 or industrially zoned land, reduce reliance on long-distance
23 transmission upgrades, and enable energization of adjacent parcels
24 or industrial clusters.

25 (4) This subdivision does not alter existing greenhouse gas
26 reduction requirements or safety standards.

27 (d) (1) The commission, in coordination with the Energy
28 Commission, the Office of Land Use and Climate Innovation, and
29 local jurisdictions, shall establish procedures to facilitate expedited
30 permitting, siting, and construction of electrical infrastructure
31 owned or operated by an electrical corporation within
32 infrastructure-constrained energization areas designated pursuant
33 to subdivision (a).

34 (2) Infrastructure eligible for expedited permitting, siting, and
35 construction pursuant to this subdivision includes distribution
36 facilities, substations, transmission upgrades, switching facilities,
37 and interconnection infrastructure necessary to provide timely
38 energization.

39 (3) The commission shall, to the extent permitted by law,
40 establish expedited review timelines, encourage concurrent

1 permitting and environmental review, coordinate multiagency
2 approvals, and prioritize cost recovery proceedings for
3 infrastructure that reduces energization delays.

4 (4) A local jurisdiction may designate priority energization
5 projects eligible for coordinated permitting pursuant to this
6 subdivision.

7 (5) This section does not exempt a project from environmental
8 or safety requirements, but an agency shall prioritize timely review
9 consistent with statewide energization and economic development
10 goals.

11 (e) The commission and the Energy Commission shall
12 coordinate with, and advocate before, the Independent System
13 Operator for expedited review and prioritization of projects in
14 infrastructure-constrained energization areas designated pursuant
15 to subdivision (a).

16 SEC. 5. Section 934.5 is added to the Public Utilities Code, to
17 read:

18 934.5. (a) The commission shall require each electrical
19 corporation to meet energization timelines or targets established
20 pursuant to this article or by commission order.

21 (b) If an electrical corporation fails to meet an energization
22 timeline or target approved or required by the commission, the
23 commission shall impose a penalty, as determined by the
24 commission, unless the electrical corporation demonstrates good
25 cause, as determined by the commission.

26 (c) In determining a penalty pursuant to subdivision (b), the
27 commission shall consider all relevant factors, including, but not
28 limited to, all of the following:

29 (1) Economic harm resulting from delayed energization.

30 (2) Housing production impacts.

31 (3) Employment and economic development impacts.

32 (4) Infrastructure planning failures.

33 (5) The electrical corporation's prior compliance history.

34 (6) Whether the project is located in an
35 infrastructure-constrained energization area.

36 (d) The commission shall provide a local jurisdiction with an
37 opportunity to submit comments, information, or recommended
38 timelines for an energization project affecting its jurisdiction.

1 (e) For purposes of this section, “infrastructure-constrained
2 energization area” means an area designated by the commission
3 pursuant to subdivision (a) of Section 367.8.

4 SEC. 6. No reimbursement is required by this act pursuant to
5 Section 6 of Article XIII B of the California Constitution because
6 a local agency or school district has the authority to levy service
7 charges, fees, or assessments sufficient to pay for the program or
8 level of service mandated by this act or because costs that may be
9 incurred by a local agency or school district will be incurred
10 because this act creates a new crime or infraction, eliminates a
11 crime or infraction, or changes the penalty for a crime or infraction,
12 within the meaning of Section 17556 of the Government Code, or
13 changes the definition of a crime within the meaning of Section 6
14 of Article XIII B of the California Constitution.

O

South Coast Air Quality Management District
Legislative Analysis Summary – SB 1270 (Richardson)
Version: As Introduced – 2/20/26
Analyst: PC

SB 1270 (Richardson)

Wildfire mitigation program: financial assistance to counties.

Summary: This bill would require a joint powers authority to provide financial assistance through the California Wildfire Mitigation Financial Assistance Program (Program) to the 10 counties with the greatest combined risk of wildfire and social vulnerability based on the Program’s eligibility criteria.

Background: Current law, contingent upon a Legislative appropriation, requires the Office of Emergency Services to enter a joint powers agreement with the Department of Forestry and Fire Protection to develop and administer the California Wildfire Mitigation Program (CWMP). CWMP is intended to, among other purposes, encourage cost-effective structure hardening and retrofitting to create fire-resistant homes, businesses, and public buildings. The law also requires the joint powers authority (JPA) to establish eligibility criteria for property owners, community organizations, and local governments seeking financial assistance under the program. Under the existing program, six (6) counties have received financial assistance including: Lake, Siskiyou, Tuolumne, Shasta, El Dorado, and San Diego.

Status: 3/4/26: Referred to Senate Emergency Management Committee and Senate Natural Resources and Water Committee.

Specific Provisions: SB 1270 would build upon CWMP by requiring the JPA to provide financial assistance to the 10 counties with the greatest combined risk of wildfire and social vulnerability based on the program’s eligibility criteria. Specifically, the bill would add Riverside, Calaveras, Los Angeles and Tehama counties to the list receiving financial assistance from the wildfire mitigation program.

Impacts on South Coast AQMD’s Mission, Operations or Initiatives: SB 1270 highlights the growing severity of California’s wildfire crisis. Most recently, the Eaton and Palisades urban wildfire alone destroyed or damaged more than 18,000 structures. Wildfire smoke poses a significant public health risk. Additionally, urban wildfires raise concerns about air toxics as smoke and ash from buildings may contain asbestos, metals, and other hazardous pollutants.

This bill would direct funding to the South Coast region through CWMP. These investments would support efforts to protect communities and reduce harmful emissions from wildfires that affect public health, including our first responders.

By strengthening wildfire mitigation efforts, SB 1270 would help reduce harmful air pollution and improve public health outcomes within the South Coast region. It also aligns with South Coast AQMD’s sponsored bill AB 2349 (Solache) which would enhance the state and local air districts air incident response for disasters such as wildfires. Structure hardening and retrofitting to create fire-resistant homes, businesses, and public buildings would reduce risk of urban wildfires thereby reducing emissions and impacts on public health.

Recommended Position: SUPPORT

South Coast Air Quality Management District
Legislative Analysis Summary – SB 1270 (Richardson)
Version: As Introduced – 2/20/26
Analyst: PC

SUPPORT

N/A

OPPOSITION

N/A

Introduced by Senator Richardson

February 20, 2026

An act to amend Section 8654.8 of the Government Code, relating to fire safety.

LEGISLATIVE COUNSEL'S DIGEST

SB 1270, as introduced, Richardson. Wildfire mitigation program: financial assistance to counties.

Existing law, contingent upon an appropriation by the Legislature, requires the Office of Emergency Services to enter into a joint powers agreement with the Department of Forestry and Fire Protection to develop and administer a comprehensive wildfire mitigation program to, among other things, encourage cost-effective structure hardening and retrofitting to create fire-resistant homes, businesses, and public buildings. Existing law requires the joint powers authority to develop eligibility criteria for property owners, community organizations, and local governments who may receive financial assistance under the program.

This bill would require the joint powers authority to provide financial assistance to the 10 counties with the greatest combined risk of wildfire and social vulnerability based on the above-described eligibility criteria, as provided.

This bill would make related findings and declarations.

Vote: majority. Appropriation: no. Fiscal committee: yes.
State-mandated local program: no.

The people of the State of California do enact as follows:

1 SECTION 1. The Legislature finds and declares all of the
2 following:

3 (a) In 2017, over 1.3 million acres burned due to high-severity
4 wildfires and over 10,000 structures were destroyed. In 2018, over
5 1.8 million acres burned and over 22,700 structures were destroyed.
6 In the first month of 2025, major wildfires burned more than 50,000
7 acres.

8 (b) The Eaton and Palisades fires alone destroyed or damaged
9 more than 18,000 structures, including homes passed down from
10 generation to generation, small businesses that began with a thought
11 and became a visible reality, and places of worship across Los
12 Angeles County that served as meeting places for those seeking a
13 connection to their faith and a message of hope for even better
14 days.

15 (c) These events cover a span of the past decade. From Santa
16 Rosa to Paradise to Altadena, Californians across the state have
17 felt the emotional and financial devastation caused by the impact
18 of these wind-driven fires.

19 (d) Existing law requires the Office of Emergency Services to
20 enter into a joint powers agreement with the Department of Forestry
21 and Fire Protection to administer a comprehensive wildfire
22 mitigation and assistance program to, among other things,
23 encourage cost-effective structure hardening and retrofitting to
24 create fire-resistant homes, businesses, and public buildings.

25 (e) The California Wildfire Mitigation Financial Assistance
26 Program (CWMFAP) developed a criteria and scoring methodology
27 to prioritize financial assistance to areas and communities based
28 upon criteria that include, but are not limited to, all of the
29 following:

- 30 (1) Area and community vulnerability to wildfire.
- 31 (2) The impact of future climate risk factors on area and
32 community wildfire vulnerability assessments.
- 33 (3) Factors that lead some populations to experience a greater
34 risk to wildfire, adverse health outcomes, or an inhibited ability
35 to respond to a wildfire, including socioeconomic characteristics
36 of the areas or communities that would be protected by financial
37 assistance.

1 (f) The CWMFAP is only accepting applications for financial
2 assistance in specific areas within the following communities:

- 3 (1) Kelseyville Riviera in Lake County.
- 4 (2) Mount Shasta in Siskiyou County.
- 5 (3) Ponderosa Hills, Mira Monte, and Sunrise Subdivisions in
6 Tuolumne County.
- 7 (4) Whitmore, Lakehead, and Oak Run in Shasta County.
- 8 (5) Weber Creek in El Dorado County.
- 9 (6) Dulzura, Campo, Potrero in San Diego County.

10 (g) Based on the current criteria and scoring methodology to
11 prioritize financial assistance developed by the CWMFAP, this
12 bill proposes to provide home hardening assistance to the top ten
13 counties, which are all of the following:

- 14 (1) Lake County.
- 15 (2) Siskiyou County.
- 16 (3) Tuolumne County.
- 17 (4) Shasta County.
- 18 (5) El Dorado County.
- 19 (6) San Diego County.
- 20 (7) Riverside County.
- 21 (8) Calaveras County.
- 22 (9) Los Angeles County.
- 23 (10) Tehama County.

24 SEC. 2. Section 8654.8 of the Government Code is amended
25 to read:

26 8654.8. (a) The joint powers authority shall develop eligibility
27 criteria for property owners, community organizations, and local
28 governments who may receive financial assistance under the
29 wildfire mitigation program in accordance with this article.

30 *(b) The joint powers authority shall provide financial assistance*
31 *under the wildfire mitigation program to the ten counties with the*
32 *greatest combined risk of wildfire and social vulnerability based*
33 *on the eligibility criteria developed pursuant to subdivision (a),*
34 *which, as of January 29, 2025, are the Counties of Lake, Siskiyou,*
35 *Tuolumne, Shasta, El Dorado, San Diego, Riverside, Calaveras,*
36 *Los Angeles, and Tehama.*

37 ~~(b)~~

38 (c) The joint powers authority may also establish financial
39 assistance limits and matching funding or other recipient
40 contribution requirements, as necessary, to ensure the viability and

- 1 efficient operation of the wildfire mitigation program and to
- 2 maximize the program's impact on reducing wildfire risk in
- 3 California.

O



To: South Coast Air Quality Management District
From: Cassidy & Associates
Date: March 19, 2026
Re: March Report

HOUSE/SENATE

Congress

The House and Senate are in session this week. As conflict in the Middle East continues, lawmakers have reportedly begun talks with the White House and the Pentagon regarding a supplemental funding bill for the Iran war, which could take the form of a reconciliation bill due to Democratic opposition to the war. Lawmakers are still faced with negotiating Fiscal Year 2026 Department of Homeland Security funding, which lapsed about a month ago. On Tuesday, the Senate will begin a floor process for the SAVE America Act, which is expected to last several days before the bill will likely fail to pass. Meanwhile, several House Republicans have said they won't allow passage of any legislation until there is progress on the SAVE America Act.

EPA

On March 13, the Environmental Protection Agency (EPA) proposed amendments to the 2024 National Emissions Standards for Hazardous Air Pollutants governing ethylene oxide (EtO) emissions from commercial sterilization facilities, arguing that the prior rule exceeded statutory authority and threatened the domestic medical device supply chain. The proposal would roll back certain requirements from the 2024 rule, such as additional residual risk standards, continuous emissions monitoring mandates, and some enclosure and ventilation requirements, while maintaining core emission controls under the Clean Air Act. Read more [here](#).

On March 9, EPA Administrator Lee Zeldin announced the selection of new members to the Clean Air Scientific Advisory Committee (CASAC). The committee advises the EPA Administrator on the technical bases for EPA's National Ambient Air Quality Standards. CASAC members serve a two-year term from 2026 through 2028. The new Chair is Dr. Louis Anthony (Tony) Cox, Jr. Of Cox Associates, LLC and the new members are Dr. Brian Joondeph, Colorado Retina Associates, PC; Dr. Fotios-Christos Kafantaris, Indiana Department of Environmental Management; Ms. Katherine Kistler, Nucor Corporation; Dr. Sabine Lange, Texas Commission on Environmental Quality; Dr. Sidney Marlborough, Orion Engineered Carbons LLC; and Dr. Stanley Young, CGStat. Read more [here](#).

On February 23, the EPA finalized a rule adding sodium perfluorohexanesulfonate (PFHxS-Na) to the Toxics Release Inventory (TRI). Under this rule, businesses in covered industries must begin tracking and reporting any use or release of PFHxS-Na, a well-studied PFAS chemical. The first reporting period began January 1, 2026, and the first reports will be due to the PA by July 1, 2027. PFHxS-Na is the latest PFAS chemical added to the TRI under a process established by Congress in the 2020 National Defense Authorization Act, which directs the EPA to automatically include new PFAS chemicals in the inventory each year. Read more [here](#).

On February 20, the EPA updated guidance on Regional Haze State Implementation Plans (SIPs). The update clarifies that states should consider grid reliability impacts when analyzing the energy and nonair environmental impacts factor as part of the second planning period for Regional Haze SIPs. The clarification aims to ensure that states do not force power plant closures in order to make progress on their SIPs. Although states have always been required to consider energy impacts, effects on grid reliability were not considered. Read more [here](#).

Cassidy and Associates support in March:

- Provided guidance for the FY 27 appropriations process;
- Updated AQMD staff on surface transportation reauthorization;
- Continued conversations on permitting reform efforts in Congress and the Administration;
- Worked with SCAQMD staff to strategize on EPA outreach; and
- Participated in weekly strategy sessions with SCAQMD staff.

IMPORTANT LEGISLATIVE DATES

February 13, 2026 (expired): Deadline to fund the Department of Homeland Security.

September 30, 2025 (expired): The Farm Bill, an omnibus package of legislation that supports US agriculture and food industries, expired in 2023. The bill is reauthorized on a five-year cycle.

September 30, 2026: Deadline to fund the federal government for Fiscal Year 2027.

December 31, 2026: National Defense Authorization Act, which authorizes and funds Department of Defense (DoD) programs and sets the DoD's policy agenda each year.



Carmen Group
I N C O R P O R A T E D

To: South Coast AQMD Legislative Committee
From: Carmen Group
Date: March 18, 2026
Re: Federal Update – Executive Branch

Congress: Following President Trump’s State of the Union address on February 24th, Congress has been largely consumed by broad political dynamics heading into the midterm elections in November. This includes the shutdown of the Department of Homeland Security which is currently on day 27.

In March, House Republicans gathered in Florida for their annual retreat, where the central question was whether to pursue a second budget reconciliation package ahead of the November elections. Prospects for a second reconciliation bill remain unclear, with Speaker Johnson offering no specific policies or timelines and various Committee Chairman have already expressed skepticism that a reconciliation bill can pass in 2026 with the margins in the House. Meanwhile, the Senate is working to pass a voter ID and election reform law, the SAVE America Act, which President Trump has indicated is his top legislative priority.

The President is expected to release his FY 27 budget outlining his administration’s priority for the year in the coming weeks.

Environmental Protection Agency

EPA Inspector General Reports Grants Management Workforce Shortfall: In March, the EPA Office of Inspector General released a [report](#) finding that EPA lacks sufficient staff to adequately manage its portfolio of grants following significant workforce reductions. The IG found that employees are now managing more grants per person than the agency's own recommended benchmarks, and that EPA has not developed a workforce planning document to address the gap. EPA's response indicated it would reduce the grants workload rather than expand personnel – an approach the IG did not accept as responsive to the core finding.

EPA Proposes Revisions to Risk Management Program Rule: In late February, EPA [published](#) the Common Sense Approach to Chemical Accident Prevention rule. This rule revises EPA’s Risk Management Program (RMP) regulations by rolling back several provisions of the 2024 Safer Communities by Chemical Accident Prevention (SCCAP) rule. The proposed revisions affect stationary sources subject to chemical accident prevention requirements under Clean Air Act and are framed as a deregulatory action consistent with Executive Order 14192. Public comment on information collection provisions close April 10,

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2026. While the RMP rule primarily governs stationary industrial sources, revisions to chemical accident prevention and emergency response coordination requirements can have localized air quality and community health implications.

Department of Transportation

FTA Announced More than \$100 Million in Funding for 2026 FIFA World Cup Host Cities: This funding originates from appropriations provided by Congress in FY 26 and is being administered by the FTA to help transit agencies manage the significant ridership expected during the World Cup. For the region, LA Metro will receive roughly \$9.6 million to support transit service for the matches scheduled at SoFi Stadium this summer. Metro has indicated these funds will be used to expand rail and bus operations during the event, including additional service, operators and dispatch staff, customer service personnel, and other operational support needed to move large numbers of visitors safely and efficiently. In addition, a majority of the California congressional delegation also sent a [letter](#) to President Trump requesting that his FY 27 budget request to Congress includes an additional \$2 billion for mobility initiatives for the 2028 Olympics.

FTA Announces FY 2026 Grants for Buses and Bus Facilities Program Project Selections: In late February, FTA announced the award of approximately \$388 million for 34 projects under the FY 2026 Grants for Buses and Bus Facilities Competitive Program. The awards support projects in 19 states and Puerto Rico, selected from a pool of 479 eligible applications requesting approximately \$6.8 billion in federal funds. Eligible activities include buying and rehabilitating buses and vans, as well as building and rehabilitating bus-related facilities. Six California transit agencies received awards totaling approximately \$82.2 million. Of specific relevance: the Antelope Valley Transit Authority was awarded \$16.64 million to construct an operations and maintenance facility; City of Santa Ana was awarded \$3.4 million to rehabilitate and replace bus infrastructure; the Foothill Transit was awarded \$20.8 million to construct a mobility hub; and the Orange County Transportation Authority was awarded \$960,000 to purchase safety and security equipment for bus facilities.

Outreach: In March, Carmen Group continued to participate in weekly calls with SCAQMD staff and monitored congressional and administrative activities on permitting reform and transportation reauthorization through discussions with committee and agency staff.

KADESH & ASSOCIATES

South Coast AQMD Report for the March 2026
Legislative Meeting covering February 2026
Kadesh & Associates

The lapse in appropriations for the Department of Homeland Security continues. TSA employees have missed at least one paycheck, and the airlines have started weighing in with legislators about airport wait times. The White House and Senate Democrats have exchanged counterproposals, and Democrats in both the Senate and House have proposed votes on funding bills covering TSA, FEMA, and other DHS agencies (excluding ICE and Border Patrol), but there has been no measurable progress in bringing an agreed-to FY26 bill to the floor.

The President's FY27 budget request has not yet been submitted to Congress. Preliminary FY27 budget information is now expected to be released on the last day of March, with a more detailed budget request coming in the middle of April. That preliminary information, often called a "skinny" budget, will be enough for the Appropriations subcommittees to get started on their work. House Appropriations Chair Cole has announced an ambitious schedule for moving FY27 bills through his committee, starting April 17 and wrapping by June 10, to allow the bills to move to the House floor in the summer. This is likely to be derailed, especially if rumors of an FY26 supplemental pick up momentum. Defense funding for operations in Iran would be the cornerstone of any such legislation, but every state has unfunded priorities (such as California wildfire relief), and it is unclear how a supplemental would move forward. Some in the House have suggested using the reconciliation process as a vehicle for the supplemental request, potentially without Democratic votes.

In other legislative matters, House T&I Committee Chair Graves has resumed his optimism for a surface transportation reauthorization bill first part of April. His bill is not yet released, but will not be as expansive as the prior reauthorization, the Bipartisan Infrastructure Law. Separately, Senate Democrats have returned to the negotiating table on permitting. However, rising gas prices and energy market disruptions as a result of conflict in Iran are likely to continue to make these topics difficult for Congress to resolve.

This month, the Senate is focused on the SAVE Act to impose stricter requirements on voting. The Senate is beginning an open amendment process, as a result of the theory (proposed by Sen. Mike Lee of Utah and endorsed by President Trump) that forcing opponents of the bill to hold the floor and carry out a "talking filibuster" will ultimately lead to a simple majority vote. This gives every Senator the opportunity to propose amendments; we will likely see votes on amendments relating to Iran, gas prices, transgender issues, and other topics.

Kadesh & Associates Activity Summary-

-Worked with South Coast AQMD and the congressional delegation on FY26 and FY27 appropriations and other legislative developments.

Contacts: Contacts included staff and Members throughout the CA delegation, Senate offices, and members of key committees.

RESOLUTE^{*}

South Coast Air Quality Management District Legislative and Regulatory Update – March 2026

❖ Important Upcoming Dates

March 26, 2026 –	Spring Recess Begins Upon Adjournment
April 6, 2026 –	Legislature Reconvenes from Spring Recess
April 24, 2026 –	Last day for policy committees to hear fiscal bills

❖ RESOLUTE Actions on Behalf of South Coast AQMD. RESOLUTE partners David Quintana, and Alfredo Arredondo continued their representation of SCAQMD before the State’s Legislative and Executive branches. Selected highlights of our recent advocacy include:

- Provided ongoing updates as the legislature reconvened.
- Followed up on bills for the 2026 legislative session, including for SCAQMD sponsored legislation.

❖ AB 907 (Chen). Assemblymember Philip Chen has introduced AB 907, sponsored legislation for South Coast AQMD dealing with the inequity of pay for AQMD board members appointed to serve on the CA Air Resources Board.

The bill has been referred to Senate Environmental Quality Committee. The bill has been made into a 2-year bill.

❖ Final Bills Amended. On February 20th, the last day for bills to be introduced, there were many spot bills still left to be amended with full language. Throughout March, many spot bills were finally amended with full language. As the committee process continues, we expect more bills to be amended and we will continue to keep SCAQMD staff apprised of developments relevant to the district.

South Coast AQMD, Legislative Committee Report
Buckley Government Affairs LLC
April 10, 2026

Legislative Session Update

February 20th marked the deadline for the Legislature to introduce new bills for the current legislative session. As anticipated, hundreds of measures were introduced in the days leading up to the deadline. In total, 1,260 bills were introduced in the Assembly and 581 in the Senate. Approximately one-third of these measures were “spot bills,” which serve as placeholders for more substantive proposals that may be amended in.

Overall, the total number of bills introduced this year declined significantly due to the bill introduction limits adopted by the Legislature. More than 500 fewer bills were introduced compared to last year, making this the lowest number of bill introductions in the past twenty years.

Under legislative rules, newly introduced bills must remain in print for 30 days before they can be acted upon, allowing time for public review. As a result, the early part of March has largely been devoted to oversight and informational hearings. However, the schedule for policy committee hearings is expected to increase significantly toward the end of March and continue throughout April as committees begin hearing bills.

Budget Update

Preliminary data from California’s tax agencies shows that February 2026 General Fund income tax revenues totaled \$5.9 billion, which was \$42 million below the Governor’s January budget forecast for the month. Despite the slight monthly shortfall, year-to-date revenues remain well above projections. Through the 2025–26 fiscal year to date, General Fund income tax collections are \$6.1 billion (5.6%) above the January budget forecast. Corporation tax revenues are running 9.3% ahead of projections, while personal income tax (PIT) revenues are 4.8% above forecast. Overall, current revenue trends suggest the state may collect significantly more revenue than projected in the Governor’s January budget for both the 2025–26 and 2026–27 fiscal years.

However, a significant portion of any additional revenue would likely be directed toward school funding and reserve deposits under constitutional requirements.

Additionally, The Legislative Analyst's Office (LAO) noted that significant stock market downturns have historically had a substantial impact on California's tax collections. According to the LAO, state income tax growth typically lags stock market turning points by six to twelve months. Prior to past downturns, tax revenues have generally grown at a strong pace, often fueled by the same stock market gains that preceded the decline. Once markets fall, revenue growth tends to slow, then stall, and eventually turn negative. At this point, we have not seen the stock market downturn, but it remains something the state is closely watching.



Joe A. Gonsalves & Son

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Jason A. Gonsalves

Paul A. Gonsalves

PROFESSIONAL LEGISLATIVE REPRESENTATION

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Email: gonsalves@gonsalvi.com

TO: South Coast AQMD
FROM: Anthony, Jason & Paul Gonsalves
SUBJECT: Legislative Update – March 2026
DATE: Wednesday, March 18, 2026

The beginning of March is typically slow in Sacramento, as all new bills had to be introduced by February 20th and all bills must be in print for 30 days before they are eligible to be heard in Committee. Given the constitutional requirements for bills to be heard, Legislative Policy Committees will start in the second half of March. The Legislature adjourns for Spring Recess on March 26, 2026 and will return on April 6, 2026.

In March, the California Legislature largely transitioned from the bill-introduction phase into the policy development and committee review stage, which is where the real shaping of legislation begins. Lawmakers spent the month vetting proposals, negotiating with stakeholders, and proposing amendments to their bills.

Legislators continued advancing California's broader climate and energy agenda, with the Senate Budget Committee holding a hearing on Cap-and-Invest. This hearing was focused on the Legislature's priorities and was the official kick-off to negotiations with the Governor on how to allocate Greenhouse Gas Reduction Fund (GGRF) monies.

Overall, March 2026 was less about final legislative outcomes and more about refining priorities and testing political viability. The Legislature used this period to signal which policy areas will move forward later in the year, with clear emphasis on affordability, climate transition, and infrastructure, while beginning the detailed work that will shape final negotiations heading into the spring and summer.

The following will provide you with updates of interest to the District:

SENATE BUDGET SUBCOMMITTEE #2 HEARING: CAP-AND-INVEST

On March 5, 2026 the Senate Budget Subcommittee #2 held a hearing where they focused in part on the implementation of California's evolving "Cap-and-Invest" program, reflecting the Legislature's growing role in shaping the future of the state's carbon market. The conversation reflected a broader shift away from viewing cap-and-

trade solely as a market mechanism and more toward treating cap-and-invest as a major state funding source for climate programs. Lawmakers emphasized the need to maintain the program's core purpose while improving transparency and ensuring that revenue collection and reinvestment are clearly aligned with statutory goals.

A central focus of the hearing was the use of Cap-and-Invest revenues, particularly those deposited into the GGRF. Legislators raised concerns about whether expenditures are sufficiently tied to measurable emissions reductions and whether funds are being directed toward their intended purposes. In this context, there was notable discussion around CAL FIRE funding, with several legislators expressing concern about proposals to rely on GGRF dollars to support wildfire prevention and response activities. While acknowledging the climate-related connection between wildfires and emissions, lawmakers signaled that there is resistance to using GGRF as a backfill for core state responsibilities, like firefighting. The sentiment expressed was that CAL FIRE should be funded through the General Fund, and that diverting Cap-and-Invest revenues to cover these costs risks diluting the program's focus on direct greenhouse gas reduction and climate investments.

Affordability and economic impacts were also key themes. Legislators discussed the effect of the program on fuel prices, energy costs, and broader cost-of-living pressures, highlighting the need to balance climate ambition with economic realities. Concerns were raised about impacts on consumers, particularly low-income households, as well as on businesses operating in competitive markets. This reflects an ongoing legislative effort to ensure that climate policies are implemented in a way that does not disproportionately burden vulnerable communities or key sectors of the economy.

Finally, the hearing underscored questions about the role of the California Air Resources Board (CARB) in designing and implementing the Cap-and-Invest program. While CARB retains primary regulatory authority, legislators indicated a desire for stronger oversight and clearer alignment with legislative intent, particularly given the scale of funding involved.

SENATE JOINT INFORMATIONAL HEARING: "HOW AGRICULTURE PROGRAMS HAVE MADE USE OF CAP-AND-INVEST FUNDS"

On March 17, 2026, the California Senate Agriculture Committee and the Senate Environmental Quality Committee held a joint informational hearing focused on evaluating how agricultural programs have used revenues from the state's Cap-and-Invest program. Lawmakers, state agencies, researchers, and agricultural stakeholders discussed how GGRF funds have been allocated to climate-smart agriculture initiatives such as Healthy Soils, water efficiency (SWEEP), methane reduction, and farmland conservation. While these programs were widely viewed as effective in reducing emissions and improving resilience, a central concern raised throughout the hearing was that funding for agriculture has been inconsistent and unpredictable, often fluctuating year to year and making long-term planning difficult for farmers and program administrators.

Stakeholders emphasized that, despite agriculture's role as both a contributor to and solution for climate change, the sector has not received consistent or recent funding allocations from Cap-and-Invest revenues. This perceived gap between policy intent and actual budget outcomes led to calls for more stable, dedicated funding streams.

Stakeholder groups, including agricultural organizations, advocated for significant new investments across multiple programs, arguing that reliable funding would accelerate emissions reductions, support farm viability, and enhance environmental co-benefits such as improved soil health and water conservation. At the same time, recent legislative changes extending the Cap-and-Invest program through 2045 were noted as an opportunity to create more structured, multi-year funding plans that could better include agriculture, though specific funding commitments remain unresolved.

Overall, the hearing highlighted a growing consensus that agriculture should play a larger, more clearly supported role in California's climate strategy. Policymakers acknowledged the need to balance ambitious emissions reduction goals with the economic realities faced by farmers, particularly as broader changes to the Cap-and-Invest program may increase costs across the supply chain.

GOVERNOR APPOINTMENTS

On March 10, 2026, David Silva, of Buellton, was appointed to the California Air Resources Board. Silva has been Mayor of the City of Buellton since 2024 and Senior Director of Development for Annual Giving Programs at the University of California, Santa Barbara since 2024. He was a City Councilmember for the City of Buellton from 2022 to 2024. Silva held multiple roles at the University of California, Santa Barbara from 2015 to 2017, including Director for Development for Annual Giving Programs, Director of Development for Digital Fundraising and Annual Giving, Assistant Director of Development for Digital Fundraising, and Director of Business Development. He held multiple roles at Hilton Worldwide from 2013 to 2014, including Sales Manager and Guest Services Manager. Silva is on the Board of Directors of the Santa Barbara County Air Pollution Control District. He earned a Bachelor of Arts degree in Communications and Religious Studies from the University of California, Santa Barbara. This position requires Senate confirmation.

2026 LEGISLATIVE DEADLINES

Apr. 24 - Last day for policy committees to hear and report to fiscal committees' fiscal bills introduced in their house.

May 1 - Last day for policy committees to hear and report to the Floor non-fiscal bills introduced in their house.

May 8 - Last day for policy committees to meet prior to June 1.

May 15 - Last day for fiscal committees to hear and report to the Floor bills introduced in their house. Last day for fiscal committees to meet prior to June 1.

May 26 – 29 - Floor Session only. No committees, other than conference or Rules committees, may meet for any purpose.

May 29 - Last day for each house to pass bills introduced in that house

June 1 - Committee meetings may resume.

June 15 - Budget Bill must be passed by midnight.

June 25 - Last day for a legislative measure to qualify for the Nov. 3 General Election ballot.

July 2 - Last day for policy committees to meet and report bills. Summer Recess begins upon adjournment of session, provided Budget Bill has passed.

Aug. 3 - Legislature reconvenes from Summer Recess.

Aug. 14 - Last day for fiscal committees to meet and report bills to the Floor.

Aug. 17 – 31 - Floor Session only. No committee, other than conference and Rules committees, may meet for any purpose.

Aug. 21 - Last day to amend on the Floor.

Aug. 31 - Last day for each house to pass bills. Final recess begins upon adjournment.