



# AGENDA

## BOARD OF SUPERVISORS, COUNTY OF MONO STATE OF CALIFORNIA

Regular Meetings: First, Second, and Third Tuesday of each month. Location of meeting is specified below.  
Meeting Location: Mono Lake Room, 1st Fl., County Civic Center, 1290 Tavern Rd., Mammoth Lakes, CA  
93546

### Regular Meeting February 20, 2024

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#### TELECONFERENCE INFORMATION

This meeting will be held in person at the location listed above. Additionally, a teleconference location will be available where the public and members of the Board may participate by electronic means.

1. Mammoth Teleconference Location – for meetings held on the first and second Tuesday of each month - Mono Lake Room of the Mono County Civic Center, First Floor, 1290 Tavern Road, Mammoth Lakes, CA. 93546;
2. Bridgeport Teleconference Location – for meetings held on the third Tuesday of each Month - Mono County Courthouse, Second Floor Board Chambers, 278 Main Street, Bridgeport, CA. 93517;
3. Zoom Webinar.

Members of the public may participate via the Zoom Webinar, including listening to the meeting and providing public comment, by following the instructions below.

#### **To join the meeting by computer:**

Visit <https://monocounty.zoom.us/j/86184622677> or visit <https://www.zoom.us/>, click on "Join A Meeting" and enter the Zoom Webinar ID 861 8462 2677.

To provide public comment, press the "Raise Hand" button on your screen.

#### **To join the meeting by telephone:**

Dial (669) 900-6833, then enter Zoom Webinar 861 8462 2677

To provide public comment, press \*9 to raise your hand and \*6 to mute/unmute.

If you are unable to join the Zoom Webinar of the Board meeting, you may still view the live stream of the meeting by visiting: [https://monocounty.granicus.com/MediaPlayer.php?publish\\_id=68a69f03-6511-41ef-ae37-636788b98695](https://monocounty.granicus.com/MediaPlayer.php?publish_id=68a69f03-6511-41ef-ae37-636788b98695)

**NOTE:** In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the Clerk of the Board at (760) 932-5530 or [bos@mono.ca.gov](mailto:bos@mono.ca.gov). Notification 48 hours prior to the meeting will enable the County to make reasonable arrangements to ensure accessibility to this meeting (See 42 USCS 12132, 28CFR 35.130).

Full agenda packets are available for the public to review in the Office of the Clerk of the Board (Annex I - 74 North School Street, Bridgeport, CA 93517) and online at <http://monocounty.ca.gov/bos>. Any writing distributed less than 72 hours prior to the meeting will be available for public inspection in the Office of the Clerk of the

Board and online.

***UNLESS OTHERWISE SPECIFIED BY TIME, ITEMS SCHEDULED FOR EITHER THE MORNING OR AFTERNOON SESSIONS WILL BE HEARD ACCORDING TO AVAILABLE TIME AND PRESENCE OF INTERESTED PERSONS. PUBLIC MAY COMMENT ON AGENDA ITEMS AT THE TIME THE ITEM IS HEARD.***

9:00 AM Call meeting to Order

Pledge of Allegiance

**1. OPPORTUNITY FOR THE PUBLIC TO ADDRESS THE BOARD**

Opportunity for the public to address the Board on items of public interest that are within the subject matter jurisdiction of the Board. (Speakers may be limited in speaking time dependent upon the press of business and number of persons wishing to address the Board.) Please refer to the Teleconference Information section to determine how to make public comment for this meeting via Zoom.

**2. RECOGNITIONS - NONE**

**3. COUNTY ADMINISTRATIVE OFFICER**

CAO Report regarding Board Assignments  
Receive brief oral report by County Administrative Officer (CAO) regarding work activities.

**4. DEPARTMENT/COMMISSION REPORTS**

Receive brief oral report on emerging issues and/or activities.

**5. CONSENT AGENDA**

(All matters on the consent agenda are to be approved on one motion unless a board member requests separate action on a specific item.)

**A. Fiscal Year 2024-25 Boating Safety and Enforcement Financial Aid Program Application**

Departments: Sheriff's Office

The purpose of the Boating Safety and Enforcement Financial Aid Program is to provide State financial aid to local governmental agencies whose waterways have high usage by transient boaters and an insufficient tax base to fully support a boating safety and enforcement program. The program is intended to augment existing local resources for boating safety and enforcement activities and is not intended to fully fund Boating Safety and Enforcement programs.

**Recommended Action:** Approve proposed resolution, Authorizing the Mono County Sheriff-Coroner, Mono County Sheriff's Office Emergency Services Coordinator, and/or the Mono County Sheriff's Office Finance Officer to apply for and administer the Boating Safety and Enforcement Financial Aid Program Agreement for FY 2024/25.

**Fiscal Impact:** The award will not exceed \$133,418. There is no match requirement for this grant. In previous years, this grant was used to pay on-going costs associated with regular boating patrol on 23 lakes and to enforce California boating laws applicable to our area. Past grant expenditures include salaries, overtime, benefits, maintenance, supplies, training, vehicle expenses, utilities, and occasionally replacement of equipment. Costs incurred and not covered by the grant are transferred to the Sheriff's budget.

**B. Ordinance Amending Mono County Code Section 3.04.030 - Purchasing**

Departments: County Counsel

Proposed ordinance amending subsection A of Mono County Code Section 3.04.030 regarding processes for contracts, purchase orders and invoices.

**Recommended Action:** Adopt proposed ordinance.

**Fiscal Impact:** None.

**C. Participation Agreement with California Mental Health Services Authority for the provision of Interoperability Software Solution**

Departments: Behavioral Health

Proposed Participation Agreement with California Mental Health Services Authority (CalMHSA) for the provision of Interoperability Software Solution.

**Recommended Action:** Approve and authorize Board Chair and Behavioral Health Director to sign Participation Agreement with CalMHSA for the provision of Interoperability Software Solution for the period of February 2024 to December 31, 2026, and a not-to-exceed amount of \$222,948.

**Fiscal Impact:** The total amount of this contract is \$222,948, which consists of a one-time implementation fee of \$100,000 and annual subscription fees. The annual rate of participation is \$39,000 and is subject to a 5% annual increase. (Year two is \$40,950; year three is \$42,998). The project will be paid for using Mental Health Services Act funds and may be offset by Center for Data Insights and Innovation (CDII) grant funds in the amount of \$50,000. The costs for FY 23-24 are included in the mid-year budget.

**6. CORRESPONDENCE RECEIVED - NONE**

Direction may be given to staff regarding, and/or the Board may discuss, any item of correspondence listed on the agenda.

**7. REGULAR AGENDA - MORNING**

**A. Superintendent of Schools Report**

Departments: Mono County Office of Education

30 minutes

(Dr. Stacey Adler, Superintendent of Schools) - Dr. Stacey Adler, Superintendent, will present her regular update to the Mono County Board of Supervisors, including but not limited to the topics of: Current district enrollment; Status of MUSD superintendent search; Arts education; Social/emotional learning/mental health assistance; and status of preschool.

**Recommended Action:** None, informational only.

**Fiscal Impact:** None.

**B. Mono County Short-Term Rental and Housing Study**

Departments: Community Development

1 hour

(Aaron M. Washco, Planning Analyst) - Presentation by Shawna Brekke-Read (MIG, Inc.) and Aaron Nousaine (BAE Urban Economics, Inc.) regarding the findings of the Mono County Short-Term Rental Housing Study.

**Recommended Action:** None, informational only. Provide any desired direction to staff.

**Fiscal Impact:** None.

**C. Grant Agreement with Eastern Sierra Community Housing for Access Apartments**

Departments: County Administrative Office

5 minutes

(Tyrone Grandstrand, Housing Opportunities Manager) - Proposed contract with Eastern Sierra Community Housing pertaining to grant for development of affordable housing in the Access Apartments housing project.

**Recommended Action:** Approve, and authorize CAO to sign, grant contract with Eastern Sierra Community Housing for development of affordable housing dated March 20th, 2024, and a not-to-exceed amount of \$600,000.

**Fiscal Impact:** \$600,000 transfer from affordable housing fund to Eastern Sierra Community Housing once the contract requirements are met.

**D. Request for Letter of Support for Yosemite Area Regional Transportation System (YARTS)**

Departments: Clerk of the Board, Sponsored by Supervisor Salcido

10 minutes

(Supervisor Salcido) - Request from Merced County Association of Governments for a Yosemite Area Regional Transportation System (YARTS) letter of support for the community project funding for four new, over-the-road, clean-diesel coaches.

**Recommended Action:** Approve letter of support and authorize the Board Chair to execute letter on behalf of the Mono County Board of Supervisors.

**Fiscal Impact:** None.

**E. Election Education Series Part 4: Results, Canvass/Certification, Recounts, and Fraud Prevention**

Departments: Elections

20 minutes

(Queenie Barnard, Registrar of Voters) - In anticipation of the upcoming March 5, 2024, Presidential Primary Election, the Mono County Registrar will be presenting a four-part Election Education Series to the Board of Supervisors and public. Part 4 of the series will review Results, Canvass/Certification, Recounts, and Fraud Prevention.

**Recommended Action:** None, informational only. Provide any desired direction to staff.

**Fiscal Impact:** None.

**F. Recreation Projects of Interest - Inyo National Forest Over Snow Vehicle and CSA#1 Recommended Trails**

Departments: Public Works - Recreation

15 minutes

(Marcella Rose, Sustainable Recreation Coordinator) - Update the Board on two projects currently being worked on by the Sustainable and Outdoors Recreation division: (1) trail maintenance and development within the boundaries of County Service Area 1 (Crowley, Sunny Slopes, Tom's Place and surrounding areas); and (2) Inyo National Forest Over Snow Vehicle Designation Project.

**Recommended Action:** None, informational only.

**Fiscal Impact:** None.

**G. Workshop to Discuss Transition of the Department of Animal Services into the Division of Animal Services and Allocation List Amendment - Animal Services**

Departments: County Administrative Office/Human Resources

10 minutes

(Christine Bouchard, Assistant County Administrative Officer) - Workshop discussing CAO recommended transition of Department of Animal Services to the Division of Animal Services and the steps necessary to implement this change as directed by the Board. Approval of proposed resolution authorizing the County Administrative Officer to amend the County of Mono list of allocated positions to eliminate one Lead Animal Services Officer and add one Animal

Services Manager to begin a critical recruitment.

**Recommended Action:** Direct staff to return to the Board with the necessary documents to implement recommended reorganization of Animal Services. Adopt proposed resolution, authorizing the County Administrative Officer to amend the County of Mono list of allocated positions to eliminate one Lead Animal Services Officer and add one Animal Services Manager in the division of Animal Services.

**Fiscal Impact:** The fiscal difference between the two positions will be funded through salary savings from the vacant Lead Animal Services Officer as well as additional vacant positions within the Animal Services Division.

**H. Fiscal Year 2022-23 General Fund Fiscal Performance**

Departments: Finance

30 minutes

(Janet Dutcher, Director of Finance) - Presentation discussing analysis of trends, review of the County's General Fund (GF) fiscal performance for FY 2022-23 and concluding with information about the status of GF carryover and reserve balances.

**Recommended Action:** None. Presentation and discussion only.

**Fiscal Impact:** None.

**I. Fiscal Year 2023-24 Mid-Year Budget Review**

Departments: CAO, Finance

30 minutes

(Megan Chapman, Budget Officer) - Mid-year review of all department budget units revealed several Board level adjustments, but only three requesting use of contingency. The majority of the requested adjustments for your consideration are for newly awarded revenues and corresponding requested appropriations.

**Recommended Action:** Approve recommended mid-year budget adjustments, as presented or as revised by the Board at the meeting (4/5th vote required).

**Fiscal Impact:** Use of contingency in the amount of \$116,597 for three requested adjustments, leaving the FY 2023-24 contingency at \$589,677.

**8. CLOSED SESSION**

**A. Closed Session - Existing Litigation**

CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION. Paragraph (1) of subdivision (d) of Government Code section 54956.9. Name of cases: County of Mono v. Amerisourcebergen Drug Corporation; Cardinal Health, Inc.;

McKesson Corporation; Purdue Pharma L.P.; Purdue Pharma, Inc., et al. United States District Court, Eastern District of California, Case No. 2:18-cv-01149-MCE-KJN.

**B. Closed Session - Existing Litigation**

CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION. Paragraph (1) of subdivision (d) of Government Code section 54956.9. Name of case: Mono v. KR Property et al. Case number: CV200081

**C. Closed Session – Real Property Negotiation**

CONFERENCE WITH REAL PROPERTY NEGOTIATOR. Government Code section 54956.8. Property Address: 264 Highway 182, Bridgeport, CA. County Negotiator: Mary Booher. Negotiating Parties: Garth Moore and Mono County. Under Negotiation: Price, terms, and conditions.

**D. Closed Session – Real Property Negotiation**

CONFERENCE WITH REAL PROPERTY NEGOTIATORS. Government Code section 54956.8. Property Address: 34 Kirkwood Street, Bridgeport, CA. County Negotiator: Mary Booher and Christine Bouchard. Negotiating Parties: Brianna Brown and County of Mono. Under Negotiation: Price, terms, and conditions.

**E. Closed Session - Labor Negotiations**

CONFERENCE WITH LABOR NEGOTIATORS. Government Code Section 54957.6. Agency designated representative(s): Sandra Moberly, Mary Booher, Stacey Simon, Janet Dutcher, and Christine Bouchard. Employee Organization(s): Mono County Sheriff's Officers Association (aka Deputy Sheriff's Association), Local 39 - majority representative of Mono County Public Employees (MCPE) and Deputy Probation Officers Unit (DPOU), Mono County Paramedic Rescue Association (PARA), Mono County Correctional Deputy Sheriffs' Association. Unrepresented employees: All.

**9. BOARD MEMBER REPORTS**

The Board may, if time permits, take Board Reports at any time during the meeting and not at a specific time.

**ADJOURN**



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Sheriff's Office**

**TIME REQUIRED**

**SUBJECT** Fiscal Year 2024-25 Boating Safety and Enforcement Financial Aid Program Application

**PERSONS APPEARING BEFORE THE BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

The purpose of the Boating Safety and Enforcement Financial Aid Program is to provide State financial aid to local governmental agencies whose waterways have high usage by transient boaters and an insufficient tax base to fully support a boating safety and enforcement program. The program is intended to augment existing local resources for boating safety and enforcement activities and is not intended to fully fund Boating Safety and Enforcement programs.

**RECOMMENDED ACTION:**

Approve proposed resolution, Authorizing the Mono County Sheriff-Coroner, Mono County Sheriff's Office Emergency Services Coordinator, and/or the Mono County Sheriff's Office Finance Officer to apply for and administer the Boating Safety and Enforcement Financial Aid Program Agreement for FY 2024/25.

**FISCAL IMPACT:**

The award will not exceed \$133,418. There is no match requirement for this grant. In previous years, this grant was used to pay on-going costs associated with regular boating patrol on 23 lakes and to enforce California boating laws applicable to our area. Past grant expenditures include salaries, overtime, benefits, maintenance, supplies, training, vehicle expenses, utilities, and occasionally replacement of equipment. Costs incurred and not covered by the grant are transferred to the Sheriff's budget.

**CONTACT NAME:** Ingrid Braun

**PHONE/EMAIL:** 760-932-7549 / [ibraun@monosheriff.org](mailto:ibraun@monosheriff.org)

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

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<a href="#">Staff Report</a>
<a href="#">Resolution</a>

[Application](#)

[Tax Certification](#)

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**History**

<b>Time</b>	<b>Who</b>	<b>Approval</b>
2/13/2024 10:01 AM	County Counsel	Yes
2/7/2024 9:33 AM	Finance	Yes
2/13/2024 7:35 PM	County Administrative Office	Yes

**MONO COUNTY**  
**SHERIFF**  
*A Commitment to Community Safety and Service*



**Ingrid Braun**  
Sheriff-Coroner

DATE: February 20, 2024

**Clint Dohmen**  
Undersheriff

TO: The Honorable Board of Supervisors

FROM: Ingrid Braun, Sheriff-Coroner

SUBJECT: California Department of Parks and Recreation, Division of Boating and Waterways, Fiscal Year 2024-2025 Boating Safety and Enforcement Financial Aid Program Agreement

**RECOMMENDATION:**

Approve Resolution 24-xx authorizing the Mono County Sheriff-Coroner, Mono County Sheriff's Office Emergency Services Coordinator, and/or the Mono County Sheriff's Office Finance Officer to apply for and administer the Boating Safety and Enforcement Financial Aid Program Agreement for Fiscal Year 2024-25. The Boating Safety and Enforcement Financial Aid Program Agreement will not exceed \$133,418.52.

**DISCUSSION:**

The purpose of the Boating Safety and Enforcement Financial Aid Program is to provide State financial aid to local governmental agencies whose waterways have high usage by transient boaters and an insufficient tax base to fully support a boating safety and enforcement program. The program is intended to augment existing local resources for boating safety and enforcement activities and is not intended to fully fund Boating Safety and Enforcement programs. Eligible costs include personnel, operations, maintenance, equipment, and administration.

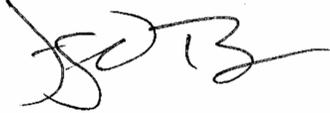
The California Department of Parks and Recreation, Division of Boating and Waterways, has requested a governing body resolution for participation in the Boating Safety and Enforcement Financial Aid Program Agreement. The resolution should specifically identify the following personnel as administrators to administer and sign documents related to the Boating Safety and Enforcement Financial Aid Program Agreement:

Mono County Sheriff-Coroner  
Mono County Sheriff's Office Emergency Management Coordinator  
Mono County Sheriff's Office Finance Officer

**FINANCIAL IMPACT:**

This resolution will assist with meeting the program guidance for participation in the Boating Safety and Enforcement Financial Aid Program Agreement for Fiscal Year 2024-2025. When the agreement is awarded, the award will not exceed \$133,418.52. There is no match requirement for this grant.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'IB', is written over a faint circular stamp.

Ingrid Braun, Sheriff-Coroner



R24-\_\_

**A RESOLUTION OF THE MONO COUNTY BOARD OF SUPERVISORS  
AUTHORIZING THE COUNTY'S PARTICIPATION IN THE FY 2024-2025  
CALIFORNIA DEPARTMENT OF BOATING AND WATERWAYS GRANT  
PROGRAM AND DESIGNATING THE SHERIFF-CORONER AS AN AUTHORIZED  
AGENT TO SIGN FOR AND ADMINISTER THE GRANT**

**WHEREAS**, Mono County, a political subdivision of the State of California, wishes to participate in the 2024-2025 California Department of Boating and Waterways grant program and to authorize the Mono County Sheriff-Coroner to act as its agent to apply for and administer grants thereunder; and

**NOW, THEREFORE, THE BOARD OF SUPERVISORS OF THE COUNTY OF MONO RESOLVES** that:

**SECTION ONE:** The County of Mono's participation in the 2024-2025 California Department of Boating and Waterways grant program is hereby authorized.

**SECTION TWO:** The Mono County Sheriff-Coroner, Mono County Sheriff's Office Emergency Management Coordinator, or the Mono County Sheriff's Office Finance Officer (the "Department") is authorized to execute for and on behalf of Mono County, following review and approval as to form by County Counsel, any documents necessary for the purpose of obtaining and administering financial assistance provided by the State of California Department of Boating and Waterways and to act as the County's agent with respect thereto.

**SECTION THREE:** The Department shall not allocate funds to any county or a public agency within the county unless the Department receives a resolution adopted annually by the Board of Supervisors authorizing the county to participate in the program and certifying that the county will expend for boating safety programs during that year not less than an amount equal to 100 percent of the amount received by the county from personal property taxes on vessels. The money allocated to the county shall be used only for boating safety and enforcement programs that are conducted in that county. The County Auditor shall be authorized to certify the amount of prior year vessel taxes received by the county.

1 **PASSED, APPROVED** and **ADOPTED** this 20th day of February, 2024, by the following vote,  
2 to wit:

3 **AYES:**

4 **NOES:**

5 **ABSENT:**

6 **ABSTAIN:**

7  
8 /  
9 //  
10 ///  
11 ////

12  
13 \_\_\_\_\_  
14 John Peters, Chair  
15 Mono County Board of Supervisors

16 **ATTEST:**

17 **APPROVED AS TO FORM:**

18  
19 \_\_\_\_\_  
20 Clerk of the Board

21  
22 \_\_\_\_\_  
23 County Counsel



## Application for Financial Aid -- 801 Fiscal Year 2024/2025

Agency           Mono County Sheriff          

County           Mono          

Address           POB 616, Bridgeport, CA 93517          

**General Description of Boating Safety and Enforcement Programs:**

*(Give a comprehensive description of all programs in the County. If more space is needed, please attach a separate sheet).*

The Mono County Boating, Safety & Enforcement Unit currently patrol's on a regular basis about 23 lakes and 2 rivers. There are hundreds of other lakes in our county that are not regularly patrolled due to their remote nature. We enforce all California boating laws applicable to our area. Those include, but are not limited to, boating under the influence, vessel registration, life jacket requirements, wake speeds, California Fish and Game violations, and investigation of all boating related collisions, etc. Our safety activities include, but are not limited to, assisting stranded vessels, providing education on boating safety to the public, assist Search and Rescue operations, provide immediate assistance to capsized vessels and their occupants, and assist the Mono County Coroner with body recoveries.

Waterways to be Patrolled					Estimated Density by Quarter <sup>a/</sup>				
Lakes, Open Ocean	Area in Square Miles	Primary Usage <sup>b/</sup>	Type(s) of Patrols <sup>c/</sup>	FT or PT <sup>d/</sup>	1st	2nd	3rd	4th	
1.	Topaz Lake	6	B	W/F/V	PT	300	200	200	300
2.	Upper Twin Lake	2	B	W/F/V	PT	37	15	Closed	51
3.	Lower Twin Lake	2	B	W/F/V	PT	20	18	Closed	21
4.	Bridgeport Reservoir	4	B	W/F/V	PT	20	15	Closed	28
5.	Lower Virginia Lake	0.5	A	F/V	PT	12	8	Closed	10
6.	Upper Virginia Lake	0.5	A	F/V	PT	15	15	Closed	10
7.	Lundy Lake	0.7	B	W/F/V	PT	12	5	Closed	10
8.	Mono Lake	89	B	W/F/V	PT	22	10	5	15
9.	Grant Lake	3	B	W/F/V	PT	25	15	Closed	15
10.	Silver Lake	0.3	A	W/F/V	PT	28	15	Closed	30
11.	Gull Lake	0.4	A	W/F/V	PT	40	25	Closed	45
12.	June Lake	1	B	W/F/V	PT	40	35	Closed	55
13.	Convict Lake	1	B	W/F/V	PT	25	25	Closed	35
14.	Crowley Lake	10	B	W/F/V	PT	300	100	Closed	300
15.	Saddlebag Lake	1	A	W/F/V	PT	10	5	Closed	15
16.	Ellery Lake	1	A	W/F/V	PT	8	5	Closed	10
17.	Tioga Lake	0.5	A	W/F/V	PT	5	5	Closed	10
18.	Lower Twin Lake	0.5	A	W/F/V	PT	20	15	Closed	25
19.	Horseshoe Lake	0.3	A	W/F/V	PT	23	25	Closed	27
20.	Lake George	0.5	A	W/F/V	PT	10	10	Closed	12
21.	Lake Mamie	0.5	A	W/F/V	PT	8	5	Closed	10
Rivers	Length in Miles	Primary Usage <sup>b/</sup>	Type(s) of Patrols <sup>c/</sup>	FT or PT <sup>d/</sup>	1st	2nd	3rd	4th	
1.	East Walker River	15	A	F/V	PT	4	4	4	4
2.	West Walker River	25	B	F/V	PT	5	2	5	2

a/ Enter the highest number of boats on the waterway at any one time on any one day in each quarter, excluding holidays and holiday weekends.

b/ A = Fishing; B = Combined recreational boating activities (fishing, water skiing, pleasure boating, etc.)

c/ On-water, foot, truck/vehicle, and/or air

d/ FT = Full-time; PT = Part-time. If less than full-time, specify patrol schedule on a separate sheet.



**Boating Safety and Enforcement Aid Program  
Proposed Program Costs -- 801.1  
Fiscal Year 2024/2025**

**Agency** Mono County Sheriff

**Address** POB 616, Bridgeport, CA 93517

**County** Mono

**Proposed Program Costs**

1. Personnel (Form 801.2)	\$111,260.52
2. Operations, Maintenance and Equipment (Form 801.3) <sup>a/</sup>	\$33,175.00
3. Total direct BS&E proposed program cost (2+3)	\$144,435.52
4. Administrative costs <sup>b/</sup>	
5. Total BS&E proposed program costs (3+4)	\$144,435.52
6. Less: Boat Taxes (Form 801.4)	\$11,017.00
7. Total Net Proposed Program Cost (5-6)	\$133,418.52

a/ New applicant agencies should use 30% of personnel costs to estimate operations, maintenance and equipment costs in lieu of form 801.3.

b/ Administrative costs cannot exceed five percent of direct BS&E proposed program cost (line 3).

*County Authorized Representative:*

Brent Gillespie  
SIGNATURE

12/26/2023  
DATE

BRENT GILLESPIE  
TYPED NAME

760-932-7549  
TELEPHONE



## Boating Safety and Enforcement Aid Program Proposed Personnel Costs -- 801.2 Fiscal Year 2024/2025

Agency Mono County Sheriff County Mono

### Proposed Personnel Costs

**Employee Compensation**

	Title	Grade	No. Hours or Months	Pay per Hour or Month	Total Compensation
1.	Deputy Sheriff**	DSA - EE	6.00	\$7,536.00	\$46,218.00
2.	Deputy Sheriff	DS-OT	400.00	\$76.52	\$31,204.00
3.	Public Safety Officer	PSO - OT	100.00	\$42.23	\$4,223.00
4.					
5.					
6.	**Fringe Benefit 58%				\$29,615.52
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
19.					
20.					
21. Total			506.00		\$111,260.52

22. Average Customary Fringe Benefit Percent \_\_\_\_\_

23. Total Proposed Personnel Costs \$111,260.52





## Boating Safety and Enforcement Aid Program

### Proposed Operations, Maintenance and Equipment Costs -- 801.3

**Fiscal Year** 2024/2025

	<u>Agency</u>	<u>Mono County Sheriff</u>	<u>County</u>	<u>Mono</u>	
<i>Patrol Vessels:</i>	Fuel	\$9,000.00	+ Repair	\$3,000.00	+ Storage
				\$7,200.00	= \$ 19,200.00
<i>Vehicles:</i>	Miles	12,500	Mileage Allowance	0.67	= 8,375.00

LIST OTHER O&M AND EQUIPMENT

1. Miscellaneous boat supplies, hardware and replacement items.	\$	4,000.00
2. Miscellaneous boat program supplies.	\$	1,600.00
3.	\$	
4.	\$	
5.	\$	
6.	\$	
7.	\$	
8.	\$	
9.	\$	
##	\$	
11.	\$	
12.	\$	
13.	\$	
14.	\$	
15.	\$	
16.	\$	
17.	\$	
18.	\$	
19.	\$	
20.	\$	
21.	\$	
22.	\$	
23.	\$	
24.	\$	
25.	\$	
<b>Total</b>	<b>\$</b>	<b><u>33,175.00</u></b>





**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: County Counsel**

**TIME REQUIRED**

**SUBJECT** Ordinance Amending Mono County  
Code Section 3.04.030 - Purchasing

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Proposed ordinance amending subsection A of Mono County Code Section 3.04.030 regarding processes for contracts, purchase orders and invoices.

**RECOMMENDED ACTION:**

Adopt proposed ordinance.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** Stacey Simon

**PHONE/EMAIL:** / ssimon@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

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<a href="#">Ordinance</a>

**History**

Time	Who	Approval
2/13/2024 9:42 AM	County Counsel	Yes
2/7/2024 8:22 AM	Finance	Yes

2/13/2024 7:36 PM

County Administrative Office

Yes

**County Counsel**  
Stacey Simon

**Assistant County Counsel**  
Christopher L. Beck

**Deputy County Counsel**  
Emily R. Fox  
Jeff Hughes

**Temporary Staff Attorney**  
Anne L. Frievalt

**OFFICE OF THE  
COUNTY COUNSEL**

*Mono County*

South County Offices  
P.O. BOX 2415  
MAMMOTH LAKES, CALIFORNIA 93546

**Telephone**  
760-924-1700

**Risk Manager**  
Jay Sloane

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**Paralegal**  
Kevin Moss

To: Board of Supervisors

From: Stacey Simon and Sandra Moberly

Date: February 6 and 20, 2024

Re: Ordinance amending Mono County Code Section 3.04.030 related to contracting procedures

**Strategic Plan Focus Area(s) Met**

A Thriving Economy     Safe and Healthy Communities     Mandated Function  
 Sustainable Public Lands     Workforce & Operational Excellence

**Discussion**

The Board of Supervisors has delegated authority to the County Administrative Officer (CAO) to act as Purchasing Agent for the County pursuant California Government Code sections 25500 et seq. Under the delegated authority, which is found in Mono County Code (MCC) Chapter 3.04, the CAO may enter into contracts for goods or services on behalf of the County in amounts up to the statutory limit established by section 25502.3 (currently \$84,890 annually). Further, the Board has designated County department heads as “Assistant Purchasing Agents”, with authority to approve contracts for goods or services up to \$25,000 total.

As Purchasing Agent, the CAO is also charged with determining the type of documentation required for such purchases, the procedures to be followed, and the specific contract terms to be utilized. (*See* MCC §3.04.025.C.) Under this authority, the CAO has adopted a “Short-Form Contract Policy” and a “Contract Procedures” policy, which were recently codified in the Mono County Administrative Policies and Procedures Manual as policies L-1 and L-2.

Notwithstanding the authority delegated to the CAO to determine these matters, Section 3.04.040.A of the Mono County Code currently requires that: “Contracts for services, and any purchase order or invoice that is not on a standard county form, shall be reviewed and approved by county counsel and risk management prior to execution.” This language has proven difficult to implement – for example, when a department takes a jacket in to be embroidered with a

County logo at an embroidery shop in Mammoth, it is not realistic for the County Counsel and Risk Manager to review the purchase order for the work.

Because the facts of any given transaction should be considered when determining the appropriate level of review, it is proposed that the language requiring County Counsel and Risk Management review of every transaction be stricken from the County Code. In its place, the CAO would implement a policy which provides direction to staff regarding required review, which would allow for exceptions to be made by the Purchasing Agent (the CAO) on a case-by-case basis.

If you have any questions regarding this item, please call or email me at 760-924-1704 or [ssimon@mono.ca.gov](mailto:ssimon@mono.ca.gov).



ORDINANCE NO. ORD24-\_\_

**AN ORDINANCE OF THE MONO COUNTY  
BOARD OF SUPERVISORS AMENDING SUBSECTION A OF  
MONO COUNTY CODE SECTION 3.04.030 REGARDING PROCESSES FOR  
CONTRACTS, PURCHASE ORDERS AND INVOICES**

**WHEREAS**, through adoption of Mono County Code Chapter 3.04, the Board of Supervisors appointed the County Administrative Officer (CAO) Purchasing Agent for the County pursuant to Government Code Sections 25500 et seq., thereby authorizing the CAO to purchase goods or services for the County up to statutory limits; and

**WHEREAS**, under section 3.04.025, the CAO is also authorized to determine appropriate requirements and procedures for such purchases, including whether and what type of documentation is required and what terms apply; and

**WHEREAS**, the Board wishes to amend the County Code to affirm and clarify that the CAO, and not the Board, should determine and implement procedures and requirements applicable to the purchase of goods or services for the County which fall within the limits delegated to the CAO by Chapter 3.04;

**NOW, THEREFORE, THE BOARD OF SUPERVISORS OF THE COUNTY OF MONO ORDAINS** that:

**SECTION ONE:** The second sentence of Subdivision A of Section 3.04.030 of the Mono County Code is hereby deleted in its entirety.

**SECTION TWO:** The County Administrator, in consultation with County Counsel and such other departments as deemed necessary, may develop purchasing procedures pursuant to authority granted by Mono County Section 3.04.025, provided they are consistent with Mono County Code Chapter 3.04 and State law. In the event such procedures require, or would benefit from, codification in the Mono County Administrative Policies and Procedures Manual, the CAO may present them to the Board for inclusion in that Manual.

**SECTION THREE:** If any provision or any part of any provision of this ordinance or the application thereof to any person, property or circumstance is held invalid by a court of competent jurisdiction, such invalidity shall not affect other provisions or parts of a provision or applications of the ordinance which can be given effect without the invalid provision, part of a provision or application, and to this end, the provisions and the parts of each provision of the ordinance are declared to be severable.

**SECTION FOUR:** This ordinance shall become effective 30 days from the date of its adoption and final passage, which appears immediately below. The Clerk of the Board of Supervisors shall post this ordinance and also publish it in the manner prescribed by Government

1 Code Section 25124 no later than 15 days after the date of its adoption and final passage. If the  
2 Clerk fails to publish this ordinance within said 15-day period, then the ordinance shall not take  
effect until 30 days after the date of publication.

3 **PASSED, APPROVED and ADOPTED** this 20<sup>th</sup> day of February, 2024, by the  
4 following vote, to wit:

5 **AYES:**

6 **NOES:**

7 **ABSENT:**

8 **ABSTAIN:**  
9

10 \_\_\_\_\_  
John Peters, Chair  
Mono County Board of Supervisors

11  
12 **ATTEST:**

**APPROVED AS TO FORM:**

13  
14 \_\_\_\_\_  
Clerk of the Board

14 \_\_\_\_\_  
County Counsel



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Behavioral Health**

**TIME REQUIRED**

**SUBJECT** Participation Agreement with California Mental Health Services Authority for the provision of Interoperability Software Solution

**PERSONS APPEARING BEFORE THE BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Proposed Participation Agreement with California Mental Health Services Authority (CalMHSA) for the provision of Interoperability Software Solution.

**RECOMMENDED ACTION:**

Approve and authorize Board Chair and Behavioral Health Director to sign Participation Agreement with CalMHSA for the provision of Interoperability Software Solution for the period of February 2024 to December 31, 2026, and a not-to-exceed amount of \$222,948.

**FISCAL IMPACT:**

The total amount of this contract is \$222,948, which consists of a one-time implementation fee of \$100,000 and annual subscription fees. The annual rate of participation is \$39,000 and is subject to a 5% annual increase. (Year two is \$40,950; year three is \$42,998). The project will be paid for using Mental Health Services Act funds and may be offset by Center for Data Insights and Innovation (CDII) grant funds in the amount of \$50,000. The costs for FY 23-24 are included in the mid-year budget.

**CONTACT NAME:** Amanda Greenberg

**PHONE/EMAIL:** 760-924-1754 / [agreenberg@mono.ca.gov](mailto:agreenberg@mono.ca.gov)

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Staff Report</a>
<a href="#">Contract</a>

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**History**

<b>Time</b>	<b>Who</b>	<b>Approval</b>
2/15/2024 5:07 PM	County Counsel	Yes
2/7/2024 8:29 AM	Finance	Yes
2/16/2024 10:14 AM	County Administrative Office	Yes



MONO COUNTY BEHAVIORAL HEALTH DEPARTMENT

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**COUNTY OF MONO**

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P. O. BOX 2619 MAMMOTH LAKES, CA 93546 (760) 924-1740 FAX: (760) 924-1741

**TO:** Mono County Board of Supervisors

**FROM:** Amanda Greenberg, Mono County Behavioral Health Program Manager

**DATE:** February 2, 2024

**SUBJECT:**

Participation Agreement with CalMHSA (California Mental Health Services Authority) for the provision of Interoperability Software Solution

**DISCUSSION:**

Through CalAIM, Mono County Behavioral Health is subject to a variety of new state and federal requirements, including interoperability requirements. CalMHSA is offering counties the opportunity to opt into a service called "CalMHSA Connex," a managed Interoperability Software as a Service (SaaS) solution, to assist counties in meeting these requirements. CalMHSA Connex will facilitate the exchange of protected health information (PHI), personally identifiable information (PII) and other information between organizations and will assist Participants in connecting to larger national exchange networks.

The term of the program is from February 20, 2024 to December 31, 2026.

**SUBMITTED BY:**

Amanda Greenberg, Program Manager, Contact: 760.924.1740

CALIFORNIA MENTAL HEALTH SERVICES AUTHORITY  
PARTICIPATION AGREEMENT  
COVER SHEET

1. Mono County (“Participant”) desires to participate in the Program identified below.

**Name of Program:** Interoperability Solution

**Summary of Program:** CalMHSA will provide “CalMHSA Connex,” a managed Interoperability Software as a Service (SaaS) solution (the “Services”), to assist participating counties in meeting state and federal interoperability requirements. CalMHSA Connex will facilitate the exchange of protected health information (PHI), personally identifiable information (PII) and other information between organizations and will assist Participants in connecting to larger national exchange networks.

2. California Mental Health Services Authority (“CalMHSA”) and Participant acknowledge that the Program will be governed by CalMHSA’s Joint Powers Agreement and its Bylaws, and by this participation agreement (the “Agreement”). The following exhibits are intended to clarify how the provisions of those documents will be applied to this Program.

Exhibit A	Program Description and Funding
Exhibit B	General Terms and Conditions
Exhibit C	Data Sharing Agreement

3. The amount payable for the term of this Agreement is \$222,948.

This amount is comprised of a one-time Implementation and Project Management fee plus an annual Managed Services subscription fee. Additional fees may apply if Participant requests additional work or customizations not included in Exhibit A, Section III. Scope of Work, or where third-party fees are applicable.

4. County to confirm if funds payable under this agreement are:

From a federal source or program (explain below)	Amount \$ 0 _____
Grant Funding (explain below):	Amount \$ <u>50,000</u>
Restricted (explain below):	Amount \$ 0 _____
Contingent (explain below):	Amount \$ 0 _____

Explanation of Restriction(s):

CalMHSA has applied for \$50,000 in grant funds from the Center for Data Insights and Innovation on behalf of Participant. If awarded, these funds will be used to offset Participant’s overall cost.

\*County confirms that aside from the above, there are no other funding restrictions.

5. The term of the Program is February 20, 2024, through December 31, 2026.

Authorized Signatures:

**CalMHSA:**

Signed: \_\_\_\_\_ Name (Printed): Dr. Amie Miller, Psy.D., MFT

Title: Executive Director Date: \_\_\_\_\_

**Participant (Mono County):**

Signed: \_\_\_\_\_ Name (Printed): John Peters

Title: Chair, Board of Supervisors Date: \_\_\_\_\_

Signed: \_\_\_\_\_ Name (Printed): Jeff Hughes

Title: Deputy County Counsel Date: \_\_\_\_\_

Signed: \_\_\_\_\_ Name (Printed): Jacob Sloane

Title: Risk Manager Date: \_\_\_\_\_

Signed: \_\_\_\_\_ Name (Printed): Robin K. Roberts, MFT

Title: Director of Behavioral Health Date: \_\_\_\_\_

**Participation Agreement**  
EXHIBIT A – PROGRAM DESCRIPTION AND FUNDING

- I. **Name of Program:** Interoperability Solution
- II. **Term of Program:** February 20, 2024, through December 31, 2026.
- III. **Scope of Work:**

CalMHSA will provide Participant the following services:

**A. CalMHSA Responsibilities**

- 1. California Data Exchange Framework (“DxF”) Data Exchange Requirements.
  - a. CalMHSA will provide a third-party brokered Integrating the Healthcare Enterprise (IHE) gateway and/or FHIR endpoint and workflow to facilitate query/response data exchange transactions via CalMHSA Connex. Available data exchange architecture(s) will align with industry standards and include the following options:
    - i. Fast Healthcare Interoperability Resources (FHIR);
    - ii. Cross-Community Access/Patient Discovery (XCA/XCPD);
    - iii. Cross Enterprise Document Sharing (XDS.b).
  - b. The Services will include a single bi-directional interface, which will include one inbound and one outbound connection to CalMHSA Connex.
  - c. CalMHSA will assist Participant in producing necessary reporting and attestation to the Center for Data Insights and Innovation (“CDII”) for organizations applying for DxF grant funding through CalMHSA as an umbrella applicant.
- 2. CMS Interoperability and Patient Access.
  - a. CalMHSA will provide a technical solution to assist counties in complying with the following CMS Interoperability requirements:
    - i. Patient Access API – CalMHSA will implement and maintain a secure, standards-based API (HL7 FHIR Release 4.0.1) that allows patients to access their claims and encounter information, as well as a defined sub-set of their clinical information, through third-party applications of their choice.
    - ii. Provider Directory API – CalMHSA will make provider directory information publicly available via a standards-based API. CalMHSA will provide Participant with a Provider directory link to publish on Participant’s County website.
    - iii. Information Blocking regulations.
    - iv. Receipt of Admission, Discharge, and Transfer (ADT) Event Notification.
      - a) Receipt of ADTs is contingent on source organizations providing the requested data. CalMHSA will provide the means of processing and ingesting. Participant intervention may be needed to facilitate arrangements to receive appropriate messages. Third party fees may be charged by the source organizations and will be paid by Participant.

3. CalMHSA will manage the implementation of interoperability services, including, but not limited to project management, set-up and configuration, and validation. Implementation professional services including:
  - a. Developing data flow process for bi-directional data exchange.
  - b. Overseeing implementation of county endpoints.
  - c. Developing and implementing CMS interoperability requirements for Patient Access and Provider Directory, per CMS guidelines.
  - d. Work to establish connection within Participant's EHR instance.
    - i. CalMHSA will work to establish connection with Participant's instance within CalMHSA's SmartCare EHR program.
    - ii. CalMHSA will work to establish a connection with Participant's archive, including normalizing the data for California Data Exchange Framework ("DxF")
    - iii. Additional connections to non-CalMHSA SmartCare EHR and non-SmartCare EHR systems will be addressed upon Participant's request.
    - iv. Any such connections may require additional scope of work and may be subject to additional costs.
4. CalMHSA will manage operational availability of connections to include:
  - a. Managing interoperability infrastructure.
  - b. Monitoring security, HIPAA compliance and applicable data governance to the extent allowed by third party hosting service.
  - c. Maintaining uptime of on-demand, real-time bi-directional data exchange process during the hours of 8:00am – 5:00pm PST, Monday through Friday. Uptime is subject to the terms as stated in Exhibit B, Section VI. Uptime and Support.
    - i. Enabling XCA/XCPD endpoint, on behalf of County, for response to document queries for DxF compliance.
5. CalMHSA will provide training and support to Participant's staff regarding the Services.
  - a. Training will be held remotely via webinar format.
  - b. CalMHSA will make available recorded training videos for future reference.
6. CalMHSA will develop policies and procedures related to the Services and CalMHSA Connex.
  - a. During interface implementation, CalMHSA will advise on interoperability best practices and assist county designated process owners and/or relevant staff with creating or modifying policies and procedures around interoperability.
7. Additional work or customizations requested by Participant outside of the Scope of Work included in this Agreement shall be subject to additional fees and must be agreed upon in a written contract signed by the Parties.

#### **B. Participant Responsibilities**

Participant shall be responsible for the following:

1. Data Delivery – Participant will deliver data to CalMHSA in a relational structured format. Participant agrees to take steps necessary to ensure data is extracted in the

appropriate format including, but not limited to, working with their current vendor.

2. Project Management and Coordination – Participant agrees to assign staff and a lead contact to communicate and collaborate with CalMHSA throughout the Interoperability project.

**IV. Fee Structure**

Service Type	One-Time Fee	Annual Rate
Implementation and Project Management	\$100,000	
CalMHSA Managed Services Annual Subscription*		\$39,000

\*CalMHSA Managed Services Annual Subscription fee is subject to a five percent (5%) annual increase.

**Participation Agreement**  
EXHIBIT B – General Terms and Conditions

**I. Definitions**

The following words, as used throughout this Participation Agreement, shall be construed to have the following meaning, unless otherwise apparent from the context in which they are used:

- A. CalMHSA – California Mental Health Services Authority, a Joint Powers Authority (JPA) created by counties in 2009 at the instigation of the California Mental Health Directors Association to jointly develop and fund mental health services and education programs.
- B. Member – A PARTICIPANT (or JPA of two or more Counties) that has joined CalMHSA and executed the CalMHSA Joint Powers Agreement.
- C. Participant – Any County participating in the Program either as Member of CalMHSA or under a Memorandum of Understanding with CalMHSA.
- D. Program – The program identified in the Cover Sheet.

**II. Responsibilities**

- A. Responsibilities of CalMHSA:
  - 1. Act as the Fiscal and Administrative agent for the Program.
  - 2. Manage funds received consistent with the requirements of any applicable laws, regulations, guidelines and/or contractual obligations.
  - 3. Provide regular fiscal reports to Participant and/or other public agencies with a right to such reports.
  - 4. Comply with CalMHSA's Joint Powers Agreement and Bylaws.
- B. Responsibilities of Participant:
  - 1. Transfer of funding amount for the Program as specified in Exhibit B, Section V. Fiscal Provisions, which Participant will pay within the payment terms defined within this agreement.
  - 2. Provide CalMHSA and any other parties deemed necessary with requested information and assistance to fulfill the purpose of the Program.
  - 3. Any and all assessments, creation of individual case plans, and providing or arranging for services.
  - 4. Provide feedback on Program performance.
  - 5. Comply with applicable laws, regulations, guidelines, contractual agreements, JPAs, and bylaws.

**III. Duration, Term, and Amendment**

- A. The term of the Program is February 20, 2024, through December 31, 2026.

- B. This Agreement may be supplemented, amended, or modified only by the mutual agreement of CalMHSA and the Participant, expressed in writing and signed by authorized representatives of both parties.

**IV. Withdrawal, Cancellation, and Termination**

- A. Participant may withdraw from the Program and terminate the Participation Agreement upon six (6) months' written notice. Notice shall be deemed served on the date of mailing.
- B. The withdraw of a Participant from the Program shall not automatically terminate its responsibility for its share of the expense and liabilities of the Program. The contributions of current and past Participants are chargeable for their respective share of unavoidable expenses and liabilities arising during the period of their participation.

**V. Fiscal Provisions**

- A. Funding required from Participant shall be in the amount stated on the Cover Sheet of this Agreement.
- B. Payment Terms – Participant will be invoiced annually by CalMHSA, and Participant will issue payment amount identified below within thirty (30) days of invoicing.

Payment for Year 1 will be due within thirty (30) days of execution of this Participation Agreement. Payment for Years 2 and 3 will be invoiced on and due within thirty (30) days of January 1 of the applicable fiscal period. See below.

Year	APPLICABLE FISCAL PERIOD	AMOUNT
1	1/1/2024 - 12/31/2024	\$139,000
2	1/1/2025- 12/31/2025	\$40,950
3	1/1/2026- 12/31/2026	\$42,998

- C. In a Multi-County Program, Participants will share the costs of planning, administration, and evaluation in the same proportions as their overall contributions, which are included in the amount stated in Exhibit A, Program Description and Funding.

**VI. Uptime and Support**

- A. CalMHSA provides email support Monday through Friday, 8:00 a.m. to 5:00 p.m. PST. For any support questions please email: [connex@calmhsa.org](mailto:connex@calmhsa.org).
- B. The services may occasionally become temporarily unavailable for maintenance purposes or other reasons outside of CalMHSA's control. CalMHSA will make best efforts to minimize any such unavailability.

**VII. Disclaimer of Warranties**

CALMHSA MAKES NO WARRANTIES, WHETHER EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE, GUARANTEES OR CONDITIONS WITH RESPECT TO THE PROGRAM. THESE DISCLAIMERS WILL APPLY EXCEPT TO THE EXTENT APPLICABLE LAW DOES NOT PERMIT THEM.

**VIII. Limitation of Liability**

THE AGGREGATE LIABILITY OF EACH PARTY FOR ALL CLAIMS UNDER THIS AGREEMENT IS LIMITED TO DIRECT DAMAGES UP TO THE AMOUNT PAID UNDER THIS AGREEMENT FOR THE PROGRAM DURING THE 12 MONTHS BEFORE THE CAUSE OF ACTION AROSE. NEITHER PARTY WILL BE LIABLE FOR LOSS OF REVENUE OR INDIRECT, SPECIAL, INCIDENTAL, CONSEQUENTIAL, PUNITIVE, OR EXEMPLARY DAMAGES, OR DAMAGES FOR LOST PROFITS, REVENUES, BUSINESS INTERRUPTION, OR LOSS OF BUSINESS INFORMATION, EVEN IF THE PARTY KNEW THEY WERE POSSIBLE OR REASONABLY FORESEEABLE.

**Participation Agreement**  
EXHIBIT C – DATA SHARING AGREEMENT

**1. PARTIES**

This Data Sharing Agreement (“DSA”) is made by and between the parties to the underlying Participation Agreement (each individually a “Party” and collectively the “Parties”) who are required to or elect to exchange Protected Health Information (“PHI”), Personally Identifiable Information (“PII”) or other data in accordance with this Agreement, as defined below.

**2. PURPOSE AND AUTHORITY**

The privacy, security and integrity of PHI, PII and other data exchanged pursuant to this DSA and the underlying Participation Agreement are essential. This DSA is intended to facilitate data exchange between the Parties in compliance with all applicable federal, state, and local laws, regulations, and policies. This DSA sets forth a common set of terms, conditions, and obligations to support secure real-time access to, or exchange of, PHI, PII and other data between and among the Parties.

**3. DEFINITIONS**

- A. “Agreement” shall mean this Data Sharing Agreement.
- B. “Applicable Law” shall mean all federal, state, local, or tribal laws and regulations then in effect and applicable to the subject matter herein. For the avoidance of doubt, federal government entities are only subject to federal law.
- C. “Authorization” shall have the meaning and include the requirements set forth at 45 CFR § 164.508 of the HIPAA Regulations and at Cal. Civ. Code § 56.05. The term shall include all requirements for obtaining consent to disclose confidential substance abuse disorder treatment records as set forth in 42 C.F.R. Part 2, when applicable, and shall include any additional requirements under Applicable Law to disclose PHI or PII.
- D. “Breach” shall mean the unauthorized acquisition, access, disclosure, or use of PHI, PII or other data in a manner not permitted by the Agreement or Applicable Law.
- E. “Business Associate” shall mean an organization that is defined as a “business associate” in 45 C.F.R. § 160.103 of the HIPAA Regulations.
- F. “Confidential Participant Information” shall mean proprietary or confidential materials or information of a Party in any medium or format that a Party labels as such upon disclosure or that, given the nature of the information or the circumstances surrounding its disclosure, reasonably should be considered confidential. Notwithstanding any label to the contrary,

Confidential Participant Information does not include any information which is or becomes known publicly through no fault of the party to which such information is disclosed (a "Receiving Party"); is learned of by a Receiving Party from a third party entitled to disclose it; is already known to a Receiving Party before receipt from the disclosing Party as documented by the Receiving Party's written records; or is independently developed by a Receiving Party without reference to, reliance on, or use of the disclosing Party's Confidential Participant Information.

- G. "Covered Entity" shall have the meaning set forth at 45 C.F.R. § 160.103 and shall also include the following as these terms are defined in California Civil Code § 56.05: "provider of health care," "health care service plan," and "licensed health care professional."
- H. "Effective Date" shall mean the date of execution of the underlying Participation Agreement.
- I. "Governmental Participants" shall mean those Parties that are local (e.g., municipalities, counties), state, tribal, or federal entities.
- J. "Health Care Operations" for the purposes of this Agreement shall consist of the following activities:
  - I. Quality Assessment and Improvement activities as described in subsection (1) of the definition of health care operations set forth at 45 C.F.R. § 164.501.
  - II. Population-based activities relating to improving health or reducing health care costs, protocol development, case management and care coordination and contacting of health care providers and patients with information about treatment alternatives as set forth at 45 C.F.R. § 154.501.
- K. "HIPAA Regulations" shall mean the standards for privacy of individually identifiable health information, the security standards for the protection of electronic protected health information and the breach notification rule (45 C.F.R. §§ 160 and 164) promulgated by the U.S. Department of Health and Human Services under the Health Insurance Portability and Accountability Act (HIPAA) of 1996, as in effect on the Effective Date and as may be amended, modified, or renumbered.
- L. "Individual User" shall mean the person who is the subject of PHI or PII.
- M. "Payment" shall have the same meaning as set forth at 45 C.F.R. § 164.501 of the HIPAA Regulations.

- N. "Personally Identifiable Information" or "PII" shall have the same meaning as "Personal Information" set forth in Section 1798.140(o) of the California Civil Code, but shall be limited to PII exchanged pursuant to this Agreement.
- O. "Personal Representative" shall refer to a person who, under Applicable Law, has authority to act on behalf of an individual as set forth in 45 C.F.R. § 164.502(g).
- P. "Protected Health Information" or "PHI" shall refer to "protected health information" as set forth at 45 C.F.R. § 160.103 of the HIPAA Regulations and "medical information" as set forth at Civil Code § 56.05.
- Q. "Public Health Activities" shall mean an access, use or disclosure permitted under the HIPAA Regulations and any other Applicable Law for public health activities and purposes, including an access, use or disclosure permitted under 45 C.F.R. § 164.512(b) and 45 C.F.R. § 164.514(e). Public Health Activities excludes the following oversight activities: audits; civil, administrative or criminal investigations; inspections; licensure or disciplinary actions; and civil, administrative or criminal proceedings or actions other than enforcement activities by a county health officer that are authorized under Cal. Health & Safety Code § 101030.
- R. "Health Information Exchange" or "HIE" shall mean a data exchange intermediary that facilitates the exchange of patient information or other data.
- S. "Recipient" shall mean a Party that receives PHI, PII or other data from a Submitter. For purposes of illustration only, Recipients include, but are not limited to, Parties who receive queries, responses, subscriptions, publications or unsolicited messages.
- T. "Research" shall mean a systematic investigation, including research development, testing and evaluation, designed to develop or contribute to generalizable knowledge.
- U. "Sale of Information" shall mean the disclosure of PHI, PII and/or other data in return for direct or indirect remuneration from or on behalf of the recipient of the Information. Sale of PHI, PII or other data shall not include the disclosure of PHI, PII or other data for the activities set forth in 45 C.F.R. § 164.502(a)(5)(ii)(B)(2).
- V. "Social Services" shall mean the delivery of items, resources, and/or services to address social determinants of health and social drivers of health, including but not limited to housing, foster care, nutrition, access to food, transportation, employment, and other social needs.
- W. "Social Services Activities" shall mean the Social Services provided by Social Service Organizations.

- X. "Social Services Organization" shall mean a person or entity whose primary business purpose is to provide Social Services to individuals. Social Services Organizations can include but are not limited to government entities (including multi-department health and human services agencies), community-based organizations, nonprofits, and private entities.
- Y. "Submitter" shall mean a Party that submits PHI, PII or other data to a Recipient.
- Z. "System" shall mean software, portal, platform, or other electronic medium controlled by a Party through which the Party conducts PHI, PII or other data exchange-related activities. For purposes of this definition, it shall not matter whether the Party controls the software, portal, platform, or medium through ownership, lease, license, or otherwise.
- AA. "Treatment" shall have the same meaning as set forth at 45 C.F.R. § 164.501 of the HIPAA Regulations.

#### **4. USE OF PHI, PII AND OTHER DATA**

- A. REQUIRED PURPOSES. Subject to applicable law, the Parties are required to exchange PHI, PII and other data and/or provide access to PHI, PII and other data pursuant to state and federal laws and regulations for Treatment, Payment, Health Care Operations and Public Health Activities as those terms are defined herein. Participant's initial provision of PHI, PII, and other data to CalMHSA is considered Treatment. Notwithstanding the foregoing, a Party may only disclose PHI, PII or other data to another Party for Health Care Operations if each entity either has or had a relationship with the Individual User who is the subject of the PHI, PII or data being requested and the PHI, PII or data pertains to such relationship.
- B. PERMITTED PURPOSES. The Parties are permitted to exchange or provide access to PHI, PII and other data including information subject to 42 C.F.R. Part 2, for any purpose not set forth in Section C below, provided appropriate Authorizations are made, if necessary, and the disclosure or use of the PHI, PII or other data is permissible under Applicable Law.
- C. PROHIBITED PURPOSES. Unless otherwise permitted by Applicable Law or a legally valid agreement, the Parties shall not access PHI, PII or other data related to this Agreement or the underlying Participation Agreement in order to sell such information. No Party shall access PHI, PII or other data related to this Agreement or the underlying Participation Agreement in order to unlawfully discriminate or unlawfully deny or limit access to medical services, or to prosecute or take any other adverse action against an individual who accesses medical services.

#### **5. AUTHORIZATIONS**

To the extent required by Applicable Law, the Parties shall not disclose PHI, PII or other data to another

Party unless a legally valid Authorization has been obtained. For the avoidance of doubt, the Parties shall not be required to obtain an Authorization prior to disclosing PHI, PII or other data pursuant to this Agreement unless an Authorization is required under Applicable Law. Any disclosure of PHI, PII or other data by a Submitter shall be deemed an express representation that the Submitter has complied with this Section and unless the Recipient has actual knowledge to the contrary, the Recipient may reasonably and justifiably rely upon such representation.

## 6. BREACH NOTIFICATION

### A. OBLIGATIONS OF PARTIES.

- I. Pursuant to the Business Associate Agreement Under the Health Insurance Portability and Accountability Act of 1996 (“BAA”) entered into by CalMHSA and Participant, CalMHSA shall notify Participant **immediately** upon discovery of a suspected or confirmed security incident or breach, as defined by HIPAA, that involves data provided by or owned by Participant. A breach shall be treated as discovered by Business Associate as of the first day on which the breach is known, or by exercising reasonable diligence would have been known, to any person (other than the person committing the breach) who is an employee, officer or other agent of Business Associate.
- II. As soon as reasonably practicable after discovering a Breach has occurred, and within any timeframes prescribed by an applicable Business Associate Agreement or required by Applicable Law, the discovering Party shall provide a written report of the Breach to the Covered Entity and/or Party impacted by the Breach. The discovering Party shall supplement the information contained in the written report as it becomes available and shall cooperate with the Covered Entity and/or the Party impacted by the breach. The written report should include sufficient information for the recipient of the notification to understand the nature of the Breach. For instance, such written report should include, to the extent available, the following information:
  - a. A brief description of what happened, including the date of the non-permitted Use or Disclosure, Security Incident, or Breach and the date of Discovery of the non-permitted Use or Disclosure, Security Incident, or Breach, if known;
  - b. The number of Individuals whose PHI, PII or other data is involved;
  - c. A description of the specific type of PHI, PII or other data involved in the non-permitted Use or Disclosure, Security Incident, or Breach (such as whether full name, social security number, date of birth, home address, account number, diagnosis, disability code or other types of information were involved);

- d. The identification of each Individual whose Unsecured PHI or PII has been, or is reasonably believed by the discovering Party to have been, accessed, acquired, Used, or Disclosed;
  - e. Any other information necessary to conduct an assessment of whether notification to the Individual(s) is required by applicable law;
  - f. Any steps the discovering Party believes that the Individual(s) could take to protect him or herself from potential harm from the non-permitted Use or Disclosure, Security Incident, or Breach;
  - g. A brief description of what the discovering Party is doing to investigate, to mitigate harm to the Individual(s), and to protect against any further similar occurrences; and
  - h. The name and contact information for a person highly knowledgeable of the facts and circumstances of the non-permitted Use or Disclosure of PHI, PII or other data, Security Incident, or Breach.
- III. Notwithstanding the above, if a Party is notified, in writing or by oral statement by any law enforcement official or by any other governmental agency (e.g., Federal Trade Commission), that a Breach notification would impede a criminal investigation or cause damage to national security, and the statement has been documented consistent with 45 C.F.R. § 164.412(b), then the Party shall delay the Breach notification for the time period specified by the law enforcement official and as required by Applicable Law.
- IV. Where conflict exists between the terms of this DSA and an applicable Business Associate Agreement, the Business Associate Agreement shall prevail.

## **7. PRIVACY AND SECURITY**

- A. GENERAL. The Parties agree to at all times fully comply with any applicable Business Associate Agreement and all applicable law relating to this Agreement and the use of PHI, PII and other data including, but not limited to, the HIPAA Regulations.
- B. SAFEGUARDS. The Parties shall be responsible for maintaining a secure environment that supports the exchange of PHI, PII and other data as set forth in this Agreement and applicable law. Each Party, regardless of whether it, pursuant to federal law, is subject to the HIPAA Regulations, shall use appropriate safeguards to prevent unauthorized use or disclosure of PHI, PII and other data in a manner consistent with HIPAA Regulations, including implementing

appropriate administrative, physical, and technical safeguards that protect the confidentiality, integrity, and availability of PHI, PII and other data.

- C. PRIVACY STANDARDS AND SAFEGUARDS RELATED TO BEHAVIORAL HEALTH. In the event that a Party uses, accesses, or discloses behavioral health information, the Party shall, prior to engaging in any such activity, implement appropriate administrative, physical, and technical safeguards that protect the confidentiality, integrity, and availability of such information in accordance with Applicable Law, including but not limited to, 42 C.F.R. Part 2 and the California Lanterman-Petris-Short Act.
- D. TRAINING POLICIES AND PROCEDURES. Each Party shall, pursuant to this Agreement, an applicable Business Associate Agreement, Applicable Law, or applicable federal and state guidance, have written privacy and security policies relating to the use and disclosure of PHI, PII and/or other data that are consistent with and satisfy the requirements set forth in the HIPAA Regulations and Applicable Law. Before granting access to PHI or PII, each Party shall train staff, contractors, agents, employees, and workforce members, as defined under the HIPAA Regulations, who will have access to PHI or PII under this Agreement. Each Party shall also provide refresher training consistent with each Party's internal privacy and security policies but no less than annually.

## **8. MINIMUM NECESSARY**

Any use or disclosure of PHI or PII pursuant to this Agreement or the underlying Participation Agreement will be limited to the minimum PHI or PII necessary to achieve the purpose for which the information is shared, except where limiting such use or disclosure to the minimum necessary (i) is not feasible, (ii) is not required under the HIPAA Regulations (such as for Treatment) or any other Applicable Law, (iii) is a disclosure to an Individual User or Individual User's Personal Representative, (iv) is a disclosure pursuant to an Individual User's Authorization, or (v) is a disclosure required by Applicable Law.

## **9. INDIVIDUAL ACCESS**

An Individual User or an Individual User's Personal Representative shall have the right to inspect, obtain a copy of, and have bidirectional electronic access to PHI or PII about the Individual User to the extent consistent with Applicable Law.

Prior to initiating Individual Access services, the Party shall be required to verify the identity of the Individual User or the Individual User's Personal Representative using standards and methods consistent with HIPAA regulations or other Applicable Law.

**10. INDIVIDUAL USER OPT OUT**

Nothing in this Agreement shall prohibit an Individual User or an Individual User's Personal Representative from opting out of having the Individual User's PHI or PII exchanged pursuant to this Agreement.

**11. REASONABLE AND GOOD FAITH COOPERATION**

The Parties to this Agreement agree to cooperate in good to implement the provisions of this Agreement. The Parties agree to provide such non-privileged information to the reasonably requested for purposes of performing activities related to this Agreement and the underlying Participation Agreement. The Parties agree to provide any requested information and assistance to the other Party in the investigation of breaches and disputes, subject to the assisting Party's right to restrict or condition its cooperation or disclosure of information in the interest of (A) preserving privileges in any foreseeable dispute or litigation or (B) protecting its Confidential Participant Information. In no case shall a Party be required to disclose PHI or PII in violation of Applicable Law.

**12. COMPLIANCE WITH THIS AGREEMENT**

Except to the extent prohibited by Applicable Law, each Party shall comply fully with all provisions of this Agreement. To the extent that a Party delegates its duties under this Agreement to a third party (by contract or otherwise) and such third party will have access to PHI, PII or other data pursuant to this Agreement, that delegation shall be in writing and require the third party, prior to exchanging PHI, PII or other data, to agree to the same restrictions and conditions that apply through this Agreement to the Parties.

**13. ACCURACY OF PHI, PII AND OTHER DATA**

When acting as a Submitter, each Party represents that at the time of transmission, the PHI, PII and/or other data it provides is an accurate representation of the data contained in, or available through, its System and is (i) sent from a System that employs security controls that meet industry standards so that the PHI, PII and/or other data being transmitted is intended to be free from malicious software, and (ii) provided in a timely manner.

**14. EXPRESS WARRANTY OF AUTHORITY TO EXCHANGE INFORMATION**

To the extent each Party discloses PHI, PII or other data to the other Party, the disclosing Party represents and warrants that it has sufficient authority to disclose such PHI, PII and/or other data.

**15. THIRD-PARTY TECHNOLOGY**

The Parties acknowledge that each Party may use technology solutions, applications, interfaces, software, platforms, clearinghouses, and other IT resources to support exchange of PHI, PII and other data that may be provided by third parties (“Third-Party Technology”). Each Party shall have agreements in place that require Third-Party Technology vendors (i) to provide reliable, stable, and secure services to the Party and (ii) to adhere to the same or similar privacy and security standards applicable to the Party pursuant to this Agreement. Should CalMHSA contract with any additional Third-Party Technology vendors, CalMHSA shall inform the Participant. Upon signing this Participation Agreement, CalMHSA shall disclose to Participant a listing (directory) of each Third-Party Technology and the associated third-party entity providing services in the Interoperability solution. When changes to this listing (directory) occur, CalMHSA shall provide an updated version to Participant within thirty (30) calendar days. However, each Party acknowledges that Third-Party Technology may be interrupted or not available at times and that this could prevent a Party from transmitting PHI, PII or other data. The Parties do not make any representations or warranties as to their Third-Party Technology.

#### **16. TERM**

This Agreement shall commence on the Effective Date of the underlying agreement and shall continue until termination or expiration of the underlying agreement.

#### **17. EFFECT OF TERMINATION**

Upon any termination of this Agreement for any reason the Parties shall have no rights under this Agreement to exchange data with each other. Termination of this Agreement shall not affect any rights or obligations which by their terms should survive termination or expiration. Participant will retain ownership of the data provided under this agreement. Upon termination, CalMHSA will export Participant’s production data into a SQL database and provide to the Participant within ninety (90) calendar days. CalMHSA will document and confirm in writing that all Participant data has been deleted and purged from the Interoperability Solution, both in production and backups.

#### **18. LIABILITY**

Each Party shall be responsible for its acts and omissions and not for the acts or omissions of the other Party. Notwithstanding any provision in this Agreement to the contrary, neither Party shall be liable for any act or omission if a cause of action for such act or omission is otherwise prohibited by Applicable Law.

#### **19. GOVERNING LAW**

This Agreement shall be governed and enforced pursuant to the laws of the State of California, without giving effect to its conflicts of laws provisions, except to the extent California law is preempted by any provision of federal law.

**20. ASSIGNMENT**

Neither Party shall assign or transfer this Agreement, or any part thereof, without the express written consent of the other Party, which shall not be unreasonably delayed or denied. Any assignment that does not comply with the requirements of this Section shall be void and have no binding effect.

**21. SURVIVAL**

All Sections which by their nature are meant to survive this Agreement shall survive expiration or termination of this Agreement.

**22. WAIVER**

No failure or delay by any Party in exercising its rights under this Agreement shall operate as a waiver of such rights, and no waiver of any right shall constitute a waiver of any prior, concurrent, or subsequent right.

**23. THIRD-PARTY BENEFICIARIES**

Nothing in this Agreement shall confer upon any person other than the parties and their respective successors or assigns, any rights, remedies, obligations, or liabilities whatsoever.

**24. FORCE MAJEUR**

No Party shall be responsible for any delays or failures in performance caused by the occurrence of events or other circumstances that are beyond its reasonable control after the exercise of commercially reasonable efforts to either prevent or mitigate the effect of any such occurrence or event.



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Mono County Office of Education**

**TIME REQUIRED** 30 minutes

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

Dr. Stacey Adler, Superintendent of  
Schools

**SUBJECT** Superintendent of Schools Report

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Dr. Stacey Adler, Superintendent, will present her regular update to the Mono County Board of Supervisors, including but not limited to the topics of: Current district enrollment; Status of MUSD superintendent search; Arts education; Social/emotional learning/mental health assistance; and status of preschool.

**RECOMMENDED ACTION:**

None, informational only.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** Danielle S Patrick

**PHONE/EMAIL:** 15306501250 / danielle.ryan51@gmail.com

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

<p>Click to download</p> <p> <a href="#">Staff Report</a></p>
---

**History**

Time	Who	Approval
2/13/2024 9:43 AM	County Counsel	Yes
2/7/2024 8:22 AM	Finance	Yes
2/13/2024 7:36 PM	County Administrative Office	Yes



Mono County Superintendent of Schools

Report to Mono County Board of Supervisors

February 20, 2024

- 1) Current district attendance
- 2) Update on “Williams’” Schools
- 3) Overview of current programs run by MCOE
- 4) Introductory Report on the CA Community Schools Program (Kelly O’Neill will join me for this)
- 5) Questions from the Supervisors



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Community Development**

**TIME REQUIRED** 1 hour

**PERSONS APPEARING BEFORE THE BOARD** Aaron M. Washco, Planning Analyst

**SUBJECT** Mono County Short-Term Rental and Housing Study

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Presentation by Shawna Brekke-Read (MIG, Inc.) and Aaron Nousaine (BAE Urban Economics, Inc.) regarding the findings of the Mono County Short-Term Rental Housing Study.

**RECOMMENDED ACTION:**

None, informational only. Provide any desired direction to staff.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** Aaron M. Washco

**PHONE/EMAIL:** (760) 924-1810 / awashco@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Staff Report</a>
<a href="#">Attachment 1 - Mono County Short-Term Rental Housing Study, Admin Review Draft, January 24, 2024</a>

**History**

Time	Who	Approval
2/14/2024 3:08 PM	County Counsel	Yes
2/13/2024 10:57 AM	Finance	Yes

2/14/2024 4:49 PM

County Administrative Office

Yes

# Mono County Community Development

P.O. Box 347  
Mammoth Lakes, CA 93546  
(760) 924-1800, fax 924-1801  
commdev@mono.ca.gov

P.O. Box 8  
Bridgeport, CA 93517  
(760) 932-5420, fax 932-5431  
[www.monocounty.ca.gov](http://www.monocounty.ca.gov)

February 20, 2024

**To: Mono County Board of Supervisors**

**From: Aaron M. Washco, Planning Analyst**

**Re: SHORT-TERM RENTAL HOUSING STUDY**

## **FISCAL IMPACT**

None.

## **RECOMMENDATION**

None. Information only.

## **BACKGROUND**

On May 3, 2022, the Mono County Board of Supervisors (hereinafter, the “Board”) imposed a moratorium on new short-term and transient rentals, defined as nightly rentals of 30 or fewer days, in all single-family residential units regardless of land use designation. The moratorium was adopted as an urgency measure under Government Code §65858 and was extended on June 14, 2023, for 22 months and 15 days, expiring on April 29, 2024.

The urgency moratorium on new short-term and transient rentals in all single-family residential units was implemented, in part, to allow time to study the effects of short-term rentals (“STRs”) on the Mono County housing market and economy. Mono County contracted with MIG, Inc. on September 15, 2023, to conduct a study on STRs and housing in unincorporated Mono County. MIG, Inc. then subcontracted parts of the study contract to BAE Urban Economics, Inc. (together with MIG, Inc., the “study consultants”). The study contract was approved by the Board on October 10, 2023. This study is intended to provide information to evaluate Mono County’s regulations regarding short-term rentals in both single- and multi-family residential units in order to assist the Board with determining next steps.

## **DISCUSSION**

The “Mono County Short-Term Rental Housing Study” (Attachment 1) is organized into six parts. The first part discusses the history of STR regulations in Mono County and frames the purpose of the study. Part 2 summarizes research and analysis conducted for over 50 academic articles and industry publications related to STR regulations and is intended to inform Mono County of best practices to consider. Part 3 contains a policy analysis and identifies policy options regarding how the County can better regulate STRs to meet both community and County goals. Part 4 includes an economic analysis which summarizes information and data related to Mono County housing market conditions and trends, tourism accommodation industry trends, and induced Workforce Housing demand. Part 5 of the study summarizes community ideas and feedback that was obtained during a series of discussions with local stakeholders. Finally, the conclusions of the study and potential approaches for increasing the availability of workforce housing are identified in Part 6.

Shawna Brekke-Read of MIG, Inc. and Aaron Nousaine of BAE Urban Economics will present the STR study in further detail to the Board. The presentation will include the study consultants’ summary of key findings as well as policy framework analysis and options for the Board to consider and discuss.

During development of the study, Mono County released a survey on Survey Monkey to solicit feedback on the impacts of STRs on housing. An analysis and summary will be presented at the meeting by County staff and may further inform the consultant study and policy considerations.

Staff requests conceptual direction from the Board on overnight rental policies/regulations and any interest in keeping the moratorium in place. Based on the direction, staff will begin work on development of any policy changes, including outreach through the Regional Planning Advisory Committees (RPACs), and a strategy for managing the moratorium expiration date in April. As the Board is aware, General Plan Amendments require a minimum of three months, which does not leave enough time to make permanent policy changes prior to the expiration of the moratorium.

This staff report has been reviewed by the Community Development Director.

**ATTACHMENTS:**

1. Mono County Short-Term Rental Housing Study, February 12, 2024.
2. Short-Term rental survey information (to be provided at the meeting).



# Mono County

## Short-Term Rental Housing Study

February 12, 2024

Prepared for the County by:



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# EXECUTIVE SUMMARY

## BACKGROUND

Mono County adopted a moratorium temporarily prohibiting new short-term rentals (STRs) of single-family residences in May 2022. The moratorium responded to concerns that the ability to rent residential units for transient lodging of 30 days or less created a shortage of housing for the local workforce.

Mono County began regulating short-term rentals in 2012 in recognition of the need to create diverse accommodation options, while minimizing their impact to residential neighborhoods. Initially, the County focused its regulations on mitigating nuisances and health and safety issues and required a General Plan Amendment (GPA) to allow transient lodging use. Over time, the County refined its regulations based on community input and Board of Supervisors policy direction. Most recently, the County adopted its current (pre-moratorium) regulations in 2018, which required both a STR activity permit and a Use Permit for short-term rentals in residential land uses.

The purpose of this Short-Term Rental Study is to examine if and what correlations exist between allowing residential property owners to rent their houses for 30 days or less and the availability and/or affordability of rental and/or for-sale housing. The study is organized into six parts:

- **Part 1: Background:** Provides background on Mono County's history regulating STRs and frames the purpose of this Study.
- **Part 2: Literature Review:** Summarizes research and analysis conducted for over 50 academic articles and industry publications related to how STRs are regulated. This analysis can help inform best practices that Mono County can consider.
- **Part 3: Policy Analysis:** Identifies policy options regarding how the County can better regulate short-term rentals to meet both community and County goals.
- **Part 4: Economic Analysis:** Summarizes information and data related to Mono County housing market conditions and trends, tourism accommodation industry trends, and induced Workforce Housing Demand.
- **Part 5: Stakeholder Engagement:** Summarizes community ideas and feedback obtained during a series of stakeholder discussions.
- **Part 6: Conclusions and Options:** Identifies potential policy objectives related to STR regulations and housing, and options to achieve those objectives.

## LITERATURE REVIEW SUMMARY

The project team (MIG and BAE) peer reviewed more than 50 academic articles and industry publications (literature) about short-term rentals and workforce housing as part of this Study. Seven publications addressed non-urban locations with similarities to Mono County. The remaining literature was mainly focused on impacts within major urban tourist markets, such as Barcelona, London, Los Angeles, New York City, and San Francisco, among other locations. The urban-focused STR studies contain quantitative documentation of the relationships between STRs and conditions in the long-term housing market and are included to better understand ongoing trends in unincorporated Mono County. The following themes emerged based on the literature review.

---

### STRS AND THE HOUSING MARKET

The literature suggests that STRs impact the availability and cost of long-term housing, but the degree to which this is true varies based on the case study and method of analysis. According to the literature, STRs can increase the cost of for-sale housing by offering a revenue stream as a form of investment, which has been referred to as the “hotelization” of the housing stock. The available professional literature agrees that STRs do have an impact on local housing markets and, typically, the greater the concentration of STRs, the greater the impact. Research indicates that effects of STRs are stronger in areas with less owner-occupied housing and smaller inventories of hotel and motel accommodations. However, research conducted in markets where STRs account for a relatively small share of the total housing stock (e.g., San Luis Obispo County) determined that in those cases STRs do not represent enough of a demand driver to justify further regulation.

---

### STRS AND THE TOURISM ACCOMODATION INDUSTRY

There is a consensus in the research that STRs likely have an impact on occupancy and pricing among hotel and motel properties within the same market. The impacts appear larger regarding pricing compared to occupancy, where the impacts are greater on lower-priced, urban hotels rather than higher-end and suburban markets. The impacts are primarily due to a variable increase in the competitive supply of tourist accommodation. Some literature also notes that a larger competitive supply of STR units can create a disincentive to invest in hotel development and renovation. Because STR supply is ‘instantaneous,’ it can readily supplement hotel inventory during peak periods, reducing the need to make significant investments in new hotel inventory that may go underutilized during much of the year.

## POLICY ANALYSIS SUMMARY

To understand the regulatory approach of similar jurisdictions and how the county compares, this study analyzed 19 jurisdictions that have similarities to Mono County in terms of physical attributes, geography, and/or economic drivers. Three jurisdictions, Eagle County, CO; Gunnison County, CO; and Blaine County, ID, have no current STR regulations at the time of publication. For a glossary of terms, see the definition section of the Policy Analysis on page 29. The following section outlines the key takeaways from the policy analysis work.

### Average Regulation:

- Nearly all jurisdictions require some type of permit or license for STR activity.
- Nine out of 16 jurisdictions identify workforce housing as a policy rationale for regulating STRs.
- Most jurisdictions regulate STRs differently based on land use designations, with residential land uses generally having stricter regulations than non-residential land uses.
- Most jurisdictions did not require a waiting period to apply for an STR permit after the purchase of a home.

### Stricter/Unique Regulation:

- Mono County is one of only a few jurisdictions studied that link housing mitigation fees to STR activity.
- Mono County has among the strictest permit requirements for STRs in residential land uses, including the number of permits needed and the discretionary process required.
- Mono County is the only jurisdiction that differentiates permit types for different land use designations (e.g., STR Permit for residential and Vacation Home Rental (VHR) Permit for non-residential).
- Four jurisdictions have put a cap on the number of permits, either jurisdiction-wide or based on specific land use zones. Mono County has a cap in one area of June Lake.
- Some jurisdictions, such as Mammoth Lakes and Routt County/Steamboat Springs, CO, regulate where STRs are allowed or not allowed outright, based on their land use designation. Mono County does the same in some areas such as Mono City, Swall Meadows, and parts of June Lake.
- Four jurisdictions implemented some version of a Zoning Overlay; where three jurisdictions proactively created these zones, Mono County required a discretionary process to create its Transient Rental Overlay Districts (TRODs), although Mono County amended its code later to discontinue overlay districts.

- Truckee will prohibit new permits for Accessory Dwelling Units (ADUs) and multi-family units (MFU). Mono County also restricts STRs in ADUs but has less strict regulations for STRs in individually owned MFUs in non-residential land use designations.
- Only seven jurisdictions differentiate between “hosted” or “occupied” rentals, and Mono County has some of the strictest regulations on non-hosted rentals in certain locations.

## ECONOMIC ANALYSIS SUMMARY

### HOUSING MARKET CONDITIONS AND TRENDS

Mono County contains approximately 4,286 housing units in the unincorporated area, which is 31 percent of the 13,912 total countywide housing units. Approximately 60 percent, or 2,540 housing units, are occupied full-time in unincorporated Mono County, based on a combination of California Department of Finance information and the 2020 Decennial Census. Of the full-time occupied units, about one-third (821) were rented and two-thirds (1,719) were owner-occupied.

#### VACANCY RATES

More than 80 percent of the vacant housing stock, or about 40 percent of total units in the unincorporated county, are considered 'second homes' because they are used for seasonal or occasional use. About 117 units are considered functionally vacant, which means they are available for sale or rent. Other vacancies may include homes that are undergoing renovations or in the process of being sold.

The data shows a shift toward seasonal vacancy over the last 10 years. The total number of vacant units available for rent or for sale decreased, as well as the number of rented, not-occupied units, but the number of seasonally vacant units rose by about 10 percent from 2010 to 2020.

#### HOUSING SALE PRICES AND RENTAL RATES

Around 90 percent of all home sales in unincorporated Mono County over the study period were single-family homes. The median single-family home sale price over this period increased by 56 percent, from \$349,000 in 2019 to almost \$580,000 in 2023. Over this period, the median unit size for single-family home sales remained stable, suggesting that the observed increase in price is a function of market demand and unit quality, versus differences in unit size. The per square foot sale price for single-family homes also increased by around 46 percent from \$233 per square foot in 2019 to \$342 per square foot in 2023.

The remaining eight percent (5 units) of homes sold were condominiums. The average sale price for a condominium was \$626,800, compared to an average sale price of \$562,191 for a single-family residence. Location may account for this difference in price. The five condominium sales occurred in the June Lake, unincorporated Mammoth Lakes, and Long Valley areas, which typically have a higher price per square foot than more rural parts of the county. However, the County's current regulatory structure pertaining to STRs may also be a contributing factor.

Based on Mono County's median income of \$76,650 for a two-person household and December 2023 rental listing prices, the average long-term rental in unincorporated Mono County could be considered affordable to low and moderate-income households, depending upon household size. In unincorporated Mono County, a two-bedroom unit for a two-person moderate-income household is about \$2,088 per month. According to long-term rental listings in December 2023, the average price for a two-bedroom unit in the unincorporated County was about \$2,183. A one-bedroom unit would be considered affordable at about \$1,196 for a two-person household with a low income.

The average price for a one-bedroom unit was about \$1,123. However, while housing may be affordable from a statewide perspective, this data does not speak to its relative availability for the local workforce.

The data shows that the housing market is not adequately serving all households within the Mono County community. For example, the number of rentals is constrained even though rents are relatively affordable. As a result, rentals generally go to households with comparatively higher incomes, and very-low and extremely-low households likely struggle to secure adequate housing. Data also reflects a greater prevalence of overcrowding in Mono County compared to other California jurisdictions.

### *NEAR-TERM MIGRATION TRENDS*

Unincorporated Mono County experienced a modest outflow of 41 permanent relocations in 2019 and 25 relocations in 2020, which increased to 265 permanent relocations in 2021 and 203 in 2022. While not conclusive, this data supports anecdotal evidence of significant out-migration among permanent residents, potentially resulting from decreased housing affordability and availability, among other factors. Similar trends are evident in Mammoth Lakes, which experienced increasing permanent outmigration from 2019 through 2022.

### *LABOR FORCE TRENDS*

Due to its comparatively remote location, communities in Mono County must predominantly rely on the resident labor force to meet workforce needs, versus relying on workers commuting into the community from outside. Data from the 2020 five-year American Community Survey (ACS), the most recent data available, indicate that there were 8,162 persons on average employed in Mono County, with 87 percent also living within the county, and only 13 percent commuting into the county from outside. In-commuters primarily originate from the neighboring areas of Inyo County in California and Douglas County in Nevada. By comparison, Mono County had an average of 8,095 employed residents, with approximately 88 percent working within the county and 12 percent commuting out.

Mono County's total labor force availability remained fairly stable between 2015 and 2019, despite seasonal fluctuations. In April 2020 the unemployment rate reached a high of 28.5 percent, but recovered somewhat by July and remained between eight and ten percent until March of 2021. Since mid-2021, unemployment has dropped and generally remained between three and four percent countywide, which is largely consistent with historical pre-pandemic trends.

This differs in comparison to the Town of Mammoth Lakes, where unemployment generally trended downward over the same time period until stabilizing at around 0.5 percent in 2018 and 2019. The EDD reports that the unemployment rate essentially dropped to zero as of January 2021. If this data is correct, the contraction of the labor force and the decline in the unemployment rate in the Town of Mammoth Lakes implies that businesses in the town are likely being put in the position of needing to scale back operations due to inadequate labor availability or to increasingly rely on alternative labor force pools (e.g., seasonal and international workers, and workers housed within the unincorporated area).

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## TOURISM ACCOMMODATION INDUSTRY TRENDS

Tourism is Mono County's primary economic driver, generating about 50 percent of all jobs in the county as of 2022. The unincorporated county has about 50 permitted lodging businesses, including hotels, motels, and bed and breakfasts, whose rooms and units account for 911 tourist accommodation units (TAUs). The county also has 106 permitted short-term rentals, defined for the purpose of this report as rentals of 30 days or less in a private residence, which make up about 10 percent of all TAUs.

### *SHORT-TERM RENTAL INVENTORY*

The vast majority (90 units, or 85 percent) of STR units with County TOT certificates are in June Lake. These 90 STR units account for 21.9% of the total TAUs in June Lake, compared with the countywide average of 10%. According to AirDNA, 165 short-term rentals exist in the unincorporated county; however, AirDNA's numbers may include motels and/or campgrounds that list or advertise on AirBNB or other online platforms.

These 106 STR units represent about 2.4 percent of the overall housing stock in the unincorporated county, or 7.7 percent of the housing stock held vacant for seasonal and occasional use. The STRs located in unincorporated Mono County are only about three percent of the total STRs in Mono County; the Town of Mammoth Lakes contains 3,701 permitted STR units (although not all may be active), or 97 percent of the total.

Of all permitted STRs, 25 units are located in complexes with Multi-Family Residential-Low (MFR-L) land use designations and 23 units are located in Multi-family Residential-High land use designations, for a total of 48 units (or 45%) of STRs in MFR designations. A total of 36 units, or 34 percent, are located in non-residential designations including Agricultural, Commercial, Commercial Lodging –Moderate and –High, Mixed Use, Rural Resort, Service Commercial. The remaining 22 units, approximately 21 percent, are located in Residential land use designations including: Single Family Residential, Estate Residential, and Rural Residential.

The occupancy rates for online listings range from as little as 39 percent in the Coleville-Walker area to a high of 91 percent in Benton. Both areas feature only a handful of listings and have average daily rates (ADR) of \$105-\$138 per night. June Lake, which accounts for the majority of listings, has an average occupancy rate of 60 percent and an ADR of \$414 per night. ADR in Lee Vining are in the middle at \$252 per night.

More than 90 percent of units listed online for short-term rental had three or fewer bedrooms. Only two areas had listings with four or more bedrooms. Ten percent of June Lake's listings had four or more bedrooms. Topaz, which only had three listings, had one listing that was a four-bedroom single-family home.

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## INDUCED WORKFORCE HOUSING DEMAND

The county has 797 tourist accommodation units in the unincorporated area, including hotels, motels, and short-term rentals, with a latest estimate of about 662,159 occupied room nights per year. Coupled with the associated job production mentioned in the section that follows, it is estimated that 151 occupied rooms support one destination-

visitor job. Out-of-town visitor spending totals \$580.6 million per year for all Mono County, generating 5,990 jobs<sup>1</sup>. Visitor spending averages \$96,928 per supported job.

Visitor spending associated with hotel, motel, and vacation rental overnight visitors approximates \$424.8 million annually. About 73 percent, or 4,383, of all destination visitor-supported jobs in Mono County are associated with overnight visitors. According to the average of 203 occupied nights per STR, and 151 occupied nights per supported job, the project team estimates that the average STR supports around 1.3 jobs across the economy. Assuming 1.65 workers per household, based on data from the U.S. Census Bureau's Public Use Microdata Sample (PUMS), the project team estimates that the county may experience demand for 0.8 new workforce housing units for each new STR that enters the market on average.

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<sup>1</sup> Job creation includes direct jobs, indirect jobs, and induced jobs.

## STAKEHOLDER ENGAGEMENT SUMMARY

This study included a series of six focus groups, five in-person and one online, made up of community members who are involved with either housing, tourist accommodations, or local business in the community. Participants were asked a series of four questions on their perception of a link between STRs and housing availability, the current STR regulations in the county, and suggestions for either improved regulations or incentives for the creation or preservation of workforce housing. While groups differed on their preferred approach to STR regulation, the following common themes emerged:

- **Data:** Participants across the board want to see more data to inform the conversation around STRs and housing in the county.
- **Time and Resources:** Some participants believe the current regulatory process was well-informed and needs more time to take effect, while others believe that housing issues are worsening and need to be addressed now.
- **The Issue of Scale:** Participants disagreed on the importance of scale. Some saw the only answer to solving the housing problem is an increase in development, and others believe that any incremental increase in housing availability for long-term housing rather than short-term rentals would improve the housing situation.
- **Equity Lens vs. Property Owner Rights:** Participants differed in their opinion on the role of the County: some believe it is the County's duty to promote equity through affordable housing, while some believe it is not the county's role to dictate how individuals can or cannot rent their property.
- **Location-Specific Solutions:** People are generally wary of a one-size-fits all solution in the county, and they want to see individual communities considered.
- **Longstanding issue:** Many participants indicated that housing availability has been an issue prior to the conversation around short-term rentals in the county.

Participants were unanimous in that new development is needed to address the issue of housing availability. Suggestions for regulatory changes and incentives for workforce housing development were gathered and used to support the recommendation options for this report.

## CONCLUSIONS AND OPTIONS SUMMARY

The limited number of STRs in Mono County, the relatively small amount of data including number of house sales, and the comparatively strict regulations relative to other jurisdictions all mean that it is difficult to draw a strong correlation between STRs and workforce housing availability in Mono County. Based on the County's history, previous studies, and feedback during stakeholder meetings, the County as a whole, including Mammoth Lakes, has had a long-standing issue with a shortage of affordable housing that pre-dates the more recent growth and prevalence of STRs. At the same time, the prevalence of vacant or second homes has increased.

From a regulatory standpoint, the data show that Mono County's current policies have maintained the primary residential use of single-family residential neighborhoods, while still providing a portion of the bed base in high-tourist areas such as June Lake through STRs. Since 2019, 38 STRs were approved, 31 of which were in June Lake. While not a part of this study, stakeholder feedback and County code enforcement records confirm that Mono County's operational requirements have been successful in preventing unwanted behavior in residential communities. The study did find that the concentration of STRs in the June Lake area (90 percent) may be an area to consider addressing.

The County may want to consider its objectives to determine a course of action or policy change related to STR regulations.

The following outlines some potential policy objectives, with options to achieve each. The policy objectives and accompanying actions are not mutually exclusive and could be combined:

**Policy Objective:** Limit or decrease the number of existing STRs.

- Set a numeric cap on STR permits countywide.
  - o The cap may be set at the current number of permits (106), or
  - o The cap could accommodate for a defined increase, or
  - o The cap could be set at a lower number than existing permits, or
- Set a numeric cap on STR permits in a specified geographic location.

For example, the County may consider capping the number of STRs in June Lake at its current level.

- Change the General Plan and Zoning Code and prohibit STRs in some or all residential areas.

The County may want to phase this in through the permit renewal process.

As a part of any cap, the County may want to establish a lottery or random selection system in the event the number of permits available is less than the number of interested permittees. Alternatively, the County could establish a first-come, first-served system for available STR permits.

**Policy Objective:** Prevent neighborhood impacts and nuisances.

- Retain existing permitting requirements.
- Increase violation fees.
- Increase compliance staffing.

**Policy Objective:** Discourage business investment in or commodification of housing.

- Implement a waiting period before any new property owner can apply for an STR permit.
- Prohibit STR permits for a specified period where an eviction has occurred on properties in the previous two years.
- Require registration for all long-term rentals, or for rentals between 30-90 days if an overall long-term rental registration is too resource-intensive.

This may prohibit individuals from renting properties for more than 30 days to avoid STR regulations and allowing short-term renters to cut the stay short.

- Amend language in the code regarding property rights.

While the Short-Term Rental Activity Permit annual renewal process makes it clear that STR permits do not run with the land, the County Code does not use that explicit language.

- Amend definition of short-term rentals of residential properties to include fractional ownership and/or time shares.
- Prohibit new STRs.

**Policy Objective:** Preserve and encourage workforce housing units.

- Require the same approval process for MFR units as SFR units, presuming that MFR units are primarily intended to be residential uses and appropriate for workforce housing.
- Require a minimum STR size (floor area) for new STR permits to increase the likelihood that smaller housing units are retained as long-term housing and thereby more affordable to the local workforce.
- Partner with an organization to create a renter-owner matching program (non-profit, partnership).

**Policy Objective:** Increase available bed base without affecting long-term rental availability.

- Allow “hosted” STRs and change county definitions and regulations around “occupied” STRs.

A hosted STR could require a long-term occupant on any portion of the property in exchange for allowing an STR, rather than the owner/property manager simply being present for the duration of the rental.

- Exempt hosted rentals from a permit cap (if adopted) or allow in zones that don't otherwise allow STRs.
- Allow a long-term renter to occupy an ADU on a property while still allowing short-term rentals in the main home.

This could be consistent with the General Plan goal of promoting a sharing economy because the ADU would be occupied full time; the primary use would be residential and the temporary short-term rental would remain as an accessory use.

- Allow an ADU to be an STR if the main unit is occupied by the owner or a long-term renter.

**Policy Objective:** Encourage development of new workforce housing units.

- Allow one new STR to be permitted in exchange for three new workforce housing units, based on the job generation rate.
- Publicize the County's pre-approved Accessory Dwelling Unit (ADU) plans.
- Highlight State housing laws that ministerially allow 100% affordable housing developments.
- Offer loans and/or grants for building or rehabilitating or preserving long-term housing.
- Partner with Sierra Business Council or create an ombudsperson position to help shepherd housing development applicants through the development review and permitting process.

**Policy Objective:** Adjust to the market and STR trends.

- Consolidate STR permitting and tracking and create a universal tracking system.
- Collect code compliance data.
- Track and report on STR TOT revenue.
- Track and report on STR permit activity and trends in the County's annual report.

**Policy Objective:** Create an equitable permitting process.

- Consolidate the permitting process into a single unified procedure with a single set of terms and requirements for all permits, regardless of land use designation. This could include the following:

- Require a Use Permit (Planning Commission) and STR Permit (Board of Supervisors) for all residential properties in all residential zoning districts.
- Consider giving VHR permit holders one year to submit an application for CUP and STR permits.
- Continue to require annual renewals for all STR Permits.

**Policy Objective:** Engage with regional partners.

- Encourage the Town of Mammoth Lakes to regulate STRs. Additional regulations in Mammoth Lakes may help to maintain availability of long-term housing, which may help avoid impacts on long-term housing availability in the unincorporated county.

# PART 1

## BACKGROUND

The Mono County Board of Supervisors enacted a moratorium on Short-term Rental permits in single-family residential units, in part, to allow time to study the effects of STRs on the Mono County housing market and to help guide the Supervisors in implementing effective STR policy with respect to housing needs.

The term “Short-term Rentals” or “STRs” is used throughout this Study to refer to privately owned residential units/parts of a unit that are rented for a period of 30 days or less. Specific definitions vary across jurisdictions and may differ based on length of stay, land use designations, and other qualifying factors. The term “Mono County” is used throughout to refer to the unincorporated county, not including the incorporated town of Mammoth Lakes.

The purpose of this Short-Term Rental Study is to examine if and what correlations exist between allowing residential property owners to rent their houses for 30 days or less and the availability and/or affordability of rental and/or for-sale housing. The study is organized into six parts:

- **Part 1: Background:** Provides background on Mono County’s history regulating STRs and frames the purpose of this Study.
- **Part 2: Literature Review:** Summarizes research and analysis conducted for over 50 other jurisdictions related to how STRs are regulated. This analysis can help inform best practices that Mono County can consider.
- **Part 3: Policy Analysis:** Identifies policy options regarding how the County can better regulate short-term rentals to meet both community and County goals.
- **Part 4: Economic Analysis:** Summarizes information and data related to Mono County housing market conditions and trends, tourism accommodation industry trends, and induced Workforce Housing Demand.
- **Part 5: Stakeholder Engagement:** Summarizes community ideas and feedback obtained during a series of stakeholder discussions.
- **Part 6: Conclusions and Options:** Identifies potential policy objectives related to STR regulations and housing, and options to achieve those objectives.

## MONO COUNTY CONTEXT

Mono County is a rural mountain community known for its scenic natural landscapes including parts of the Sierra Mountain range. It is in the central eastern part of the state, bordering Nevada to the east, Mariposa County and Tuolumne County to the west, Alpine County to the north, and Inyo County to the south. The County is accessible to the Yosemite Valley through Tioga Pass in Mono County's town of Lee Vining.

As of the last census, the population in the county was 13,195, which includes the incorporated Town of Mammoth Lakes (with a population of 7,435), as well as multiple unincorporated towns. The unincorporated county has a population of 5,757 and its most populous towns are June Lake and Bridgeport, which is the county seat. Tourism plays a major role in the local economy, as Mono County attracts many seasonal visitors for snow sports in the winter, and hiking, camping, and fishing in the summer. Approximately 94 percent of the land in Mono County is publicly owned, and approximately 88 percent of the public land is federally owned.

## MONO COUNTY STR REGULATION HISTORY

Mono County first began regulating STRs in 2012, and the most recent changes went into effect in 2023 (see **Figure 1** for a timeline and summary of STR regulations). The County's first STR regulations, enacted in June 2012, built on the Transient Occupancy Ordinance that had been first proposed in 2009. These drafts eventually became Chapters 25 and 26 of the Mono County General Plan Land Use Element. Chapter 25, adopted in 2012, established a Transient Rental Overlay District (TROD) and required a General Plan Amendment to allow short-term rentals of residences. The new process was intended "to provide additional tourism-based economic opportunities and homeowner economic stability by allowing a transient rental district to be overlaid on properties within residential neighborhoods exhibiting support for allowing transient rentals." Chapter 26, adopted in 2013, included specific permitting regulations for all short-term rentals.

From April 2013 to May 2015, several TRODs were established within certain areas of June Lake, Mono Basin, Lundy Canyon, and Twin Lakes. Near the end of 2015, the County became aware of a growing concern from residents regarding the impact of STR activity on community character, health, and safety. In February 2016, the Planning Commission and the County Board of Supervisors held a joint workshop on the topic of TRODs, and in March 2016 they enacted an emergency moratorium temporarily prohibiting any new TRODs until the County could consider policy changes.

Starting in 2017, Mono County went through an extensive process to update its STR regulations beginning with an emergency moratorium on non-owner occupied STRs in March 2017. The Board of Supervisors ultimately adopted Ordinance No. 18-07 in May 2018, adding Chapter 5.65 to the County Code establishing Short-Term Rental Activity Permits. The 2018 amendment defined "STRs" as rental units located in residential land use designations; created STR permit and license requirements; established the application, review, and renewal processes; and created operational standards and enforcement of violations. In 2019, the County adopted Ordinance 19-08 adding Chapter 15.40 to the County Code to require housing mitigation for new residential and non-residential developments, while allowing exemptions in cases for units where STRs have been specifically prohibited as a part of the approval process.

Beginning in 2021, the County's post-COVID tourism led to renewed public concern about STRs and housing availability. The County updated its Land Use Element to make a distinction between short-term rental (Chapter 25) and transient rental (Chapter 26) development standards. In May 2022, the county enacted the latest emergency moratorium on allowing any new STRs in single family residences, which runs through April 2024.<sup>2</sup>

**Figure 1. STR Regulation History**



<sup>2</sup> July 2023 the county commissioned the STR report to help inform the Board ahead of the moratorium expiration date.

## PART 2

# LITERATURE REVIEW

The following summarizes key findings from a review of over 50 peer reviewed academic articles and industry publications about the impacts of STRs on housing and hotel markets. A full bibliography is provided at the end of this report.

### *GEOGRAPHIC REPRESENTATION*

Nearly all the available literature on the impacts of STRs reflects research conducted using data for large metropolitan areas, such as Barcelona, London, Los Angeles, New York City, and San Francisco, among other global destinations. Where possible this research highlights key findings from studies focused on non-urban markets. The research also intentionally included the review of professional studies conducted for jurisdictions throughout the Mountain West to account for potential differences in the ways that STRs impact housing and the hotel industry in smaller, less urbanized, markets.

### *LIMITATIONS OF THE LITERATURE*

Among the known limitations of the available literature are the inherent complexity and data intensiveness of the required research methods. There is also the possibility that the research omits significant variables that have a bearing on the relationship between STRs and long-term housing availability and pricing, as well as occupancy and rates within the tourist accommodations industry. The academic literature also relies heavily on data that is “scraped” from the online platforms, which is known to often be incomplete and sometimes inaccurate; for example, listings for private rooms may be in hotels or lodges rather than a room in a single-family home. The professional literature, by comparison, primarily relies on broad trends analysis, versus robust statistical analysis, which yields less confident conclusions. Therefore, the research findings summarized here should be interpreted with caution.

## HOUSING AVAILABILITY AND AFFORDABILITY

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### FINDINGS FROM THE ACADEMIC LITERATURE

The literature examined impacts in a variety of geographic locations, such as international locales, density (e.g., urban and rural/mountain communities), market-orientation (industry-funded vs community-funded), purpose (housing impacts vs tourism market impacts), and timing (2016-2023). The studies universally found a relationship between housing availability and STRs, and the extent of the relationship depends upon concentration. That is, there needs to be a significant concentration of STRs to have a substantive impact, though the threshold for significance is likely to vary across communities and destination economies.

The peer-reviewed academic literature consistently found statistically significant relationships between the number of STR listings in a market and the availability and pricing of long-term housing, both rental and for-sale. These studies also found that in destination markets, increasing demand for short-term renting incentivized the conversion of housing that may have otherwise been available for long-term

occupancy, a process referred to as the 'hotelization' of the housing stock. The research also found that an increase in the number of STRs also increases the prevalence of nuisance issues, like traffic, parking, and noise.

Research also found that STRs tend to be concentrated close to major tourist attractions, and that greater concentrations of STR listings correlated with more significant impacts to the housing and tourist accommodations markets. The research also indicates that the negative effects of STRs are stronger in places with less owner-occupied housing and smaller inventories of alternative hotel and motel accommodations. Also, smaller communities that are more dependent on transient occupancy taxes and that have more limited inventories of available rental housing may experience greater impacts.

The available research generally indicates that the relationship between the prevalence of STRs and housing affordability is stronger for for-sale home prices compared to rents. This is because buyers are often willing and able to pay more for a unit based on how much income the unit can generate on the STR market. Rental housing prices, by comparison, are impacted indirectly through reductions in the supply of long-term rentals, which increases pricing competition between renter households.

The research identifies an increasing prevalence of investor-owners in certain markets, including a rise in owners with multiple properties. This reflects the function of second homes and STRs as speculative assets, which have the potential for capital appreciation, but which can also generate rental income during the hold period to defray costs. This can entice investors to purchase properties not for their own use, and to hold "onto properties for longer than they might otherwise since they can offset carrying costs." Wachsmuth and Weisler (2018) referred to this process as "gentrification without redevelopment." Nonetheless, one study found that local regulation can have a substantive impact on the composition of the STR market, including decreasing the prevalence of hosts that own and manage multiple listings.

**Table 1** below summarizes the statistical relationships between the prevalence of STRs and long-term rental rates and for-sale home prices, as documented in the available literature. The magnitude of the impacts ranged from relatively marginal to fairly significant; though the significant growth in the sector in recent years may result in sizable cumulative impacts over time in some markets .

**Table 1: Summary of Literature Review Findings of the Impacts of STRs on Rental and For-Sale Home Pricing**

<b>Author</b>	<b>Published</b>	<b>Geography</b>	<b>Effect on Rents</b>	<b>Effect on Sale Prices</b>
Goncalves, et al.	2022	Lisbon	n.a.	8% increase on average and 20% for two-bedrooms resulting from a ban
Shabrina, et al.	2022	London	8.0% increase per 100% increase in illegal/ non-conforming STRs	n.a.
Benitez-Auriolo, et al.	2021	London	0.014% increase per 100 listings	0.032% increase per 100 listings
Franco & Santos	2021	Portugal	n.a.	3.7% increase per 1% increase in STRs
Koster, et al.	2021	Los Angeles	4.9% increase per 1% increase in STR listings	5.1% increase per 1% increase in STR Listings
Thackway, et al.	2021	Sydney	n.a.	2% increase per 1% increase in STR density
Etxezarreta-Etzarri, et al.	2020	San Sebastian	7.3% increase per standard deviation increase in STR listings	n.a.
Garcia-Lopez, et al.	2020	Barcelona	1.9% increase in areas of low concentration and 7.0% increase in areas of high concentration, for every 200 listings	4.6% increase in areas of low concentration and 7.0% increase in areas of high concentration, for every 200 listings
Zou	2019	Washington DC	n.a.	0.66% - 2.24% Overall
Barron et al.	2018	United States	0.018% increase per 1% increase in STR listings	0.026% increase per 1% increase in STR listings
Lee	2016	Los Angeles	0.2% increase per 1% increase in STR listings	n.a.
Merante & Horn	2016	Boston	0.4% increase per standard deviation increase in STR listings	n.a.
Sheppard & Udell	2016	New York	n.a.	Doubling STRs equals 6.0-31% increase

Source: BAE, 2023.

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## FINDINGS FROM PROFESSIONAL LITERATURE

Private consulting firms have completed several studies for local jurisdictions and stakeholder groups throughout the country regarding the impacts of STRs on local housing markets, including in more rural communities and mountain resort destination markets. The research included two industry sponsored studies, six studies that relied on market trends analysis, five that estimated the impact of new STRs on demand for long-term housing, and three studies that used statistical methods to estimate the impact of STRs on the supply of long-term housing.

### *INDUSTRY SPONSORED STUDIES*

The earlier of the two industry sponsored studies reviewed for this research (ECONorthwest 2016) found no significant association between STRs and housing availability and pricing, though these findings were determined to be suspect due to the client HomeAway's vested interest in the outcome of the research. The second industry sponsored study was conducted by HR&A on behalf of Airbnb in Colorado in 2022 and did find a rough association between STRs and the housing market but recommended increased subsidies for affordable housing and workforce construction and preservation, rather than additional STR regulation.

### *STR AND HOUSING MARKET TRENDS ANALYSIS*

Six studies completed by third-party consultants used market trends analysis to highlight relevant associations between STRs and local housing markets. Four of the studies were prepared by BAE for Placer and Mariposa counties and the towns of Truckee and Mammoth Lakes. These studies found likely associations between the prevalence of STRs as a share of the total housing stock and local housing market conditions, though the severity of the observed impacts differed based on the level of STR concentration.

Other studies prepared by Beacon Economics for San Luis Obispo County, by PlaceWorks for San Bernardino County, and by the Milken Institute for the State of California, found that the relative concentration of STRs within each area was not sufficient to indicate that STRs were a significant driver of housing market conditions within each area. This reinforces the conclusion identified in the academic literature that the relative concentration of STRs within a market is a likely determinant of the relative influence that STRs may have on housing availability and pricing and that proximity also plays a significant role. However, these studies fail to consider impacts below the state or county level, and as such, may miss impacts that occurred within specific communities where the concentration of STRs is greater.

### *WORKFORCE HOUSING DEMAND IMPACTS*

Five professional studies used quantitative methods to evaluate the relationship between the addition of new STRs to the market and new induced workforce housing demand. These reports include studies prepared by BAE for the Town of Truckee and Mariposa County, which applied the same methodology used in this report, as well as a study prepared by Economic and Planning Systems (EPS) for the town of Breckenridge in Colorado, and a study prepared by Root Policy Research for the town of Pagosa Springs, also in Colorado. The key findings from these studies are summarized in **Table 2**.

The key findings summarized below indicate that visitor spending associated with the creation of 100 new STRs can result in demand for anywhere from 10 to 80 new workforce housing units. The reasons for this wide variation are not entirely clear, but may reflect the relative dependence of Mariposa and Mono counties on the tourism industry.

**Table 2: Summary of Literature Review Findings of the Impacts of STRs on Induced Workforce Housing Demand and Reduced Long-Term Housing Supply**

Author	Published	Geography	Induced Workforce Housing Demand Per 100 New STRs	Supply Impacts to Long-Term Housing	
				For-Sale	Rental
BAE Urban Economics	2023	Mono County, California	69.8 Units	n.a.	n.a.
PlaceWorks	2023	San Bernardino County, California	n.a.	n.a.	n.a.
BAE Urban Economics	2023	Mariposa County, California	64.9 Units	n.a.	n.a.
Beacon Economics	2023	San Luis Obispo County, California	n.a.	n.a.	n.a.
BAE Urban Economics	2022	Truckee, California	17.2 Units	n.a.	n.a.
Milken Institute	2022	California	n.a.	n.a.	n.a.
Root Policy Research	2022	Estes Park, Colorado	n.a.	-0.011% to -0.022% per 1% increase in STR listings	-0.014% to -0.041% per 1% increase in STR listings
Root Policy Research	2022	Pagosa Springs, Colorado	11.6 Units	-0.012% to -0.023% per 1% increase in STR listings	-0.015% to -0.041% per 1% increase in STR listings
Economic & Planning Systems, Inc.	2021	Breckenridge, Colorado	11.0 Units	n.a.	n.a.
Michael Baker International	2017	South Lake Tahoe, California	n.a.	n.a.	n.a.

Source: BAE, 2023.

## WORKFORCE HOUSING SUPPLY IMPACTS

An additional study prepared in 2017 by Michael Baker International and two studies prepared more recently by Root Policy Research go a step further, estimating the statistical relationships between the STRs and the availability and pricing of housing for long-term occupancy using statistical methods similar to those reflected in the academic literature. These studies both found statistically significant relationships between STRs and housing pricing and availability; however, the Root Policy Research studies highlight the dependence on state- and regional-level data which can reduce the utility of this type of research when analyzing smaller, more diverse, communities with different underlying market dynamics.

## LODGING INDUSTRY OCCUPANCY AND RATES

### FINDINGS FROM THE ACADEMIC LITERATURE

The negative effects of STRs on the lodging industry have been shown to vary widely across different hotel classes, seasons, types of locations, and regions. Overall, the research suggests that the impacts from STRs are mainly limited to less aggressive pricing, though some studies did identify impacts to hotel and motel occupancy.

Because the STR units can enter and exit the market at-will, the supply is considered 'instantaneous' and can readily supplement hotel inventory during peak periods. This can reduce the need to make significant investments in new hotel inventory that may go underutilized during much of the year. CB Richard Ellis, a major global real estate firm, recommended as early as 2020 that hotel operators and investors conduct detailed analysis on the quantity and quality of STR product offerings in any market where 10 percent or more of the supply of tourist accommodations is made up of STR units. In more recent years, some hotel operators have begun integrating home sharing like attributes and experiences to more effectively compete with STRs, such as with the townhome type units recently added to the property at Outbound in Mammoth Lakes.

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## PART 3

# POLICY ANALYSIS

The State of California (State) allows local jurisdictions to tax the rental of individual residences for 30 days or less because these rentals are considered transient lodging along with hotels, motels, and bed and breakfasts. By contrast, rentals of more than 30 days are considered housing, cannot be taxed, and confer housing rights to occupants.

Terms, definitions, and regulations of residential-based transient lodging differ across jurisdictions. As further detailed below, jurisdictions use terms that include short-term rentals, vacation (and vacation home) rentals and transient lodging. For the purposes of this Study, the comparative analysis focuses on the use of private homes for durations of 30 days or less, no matter the term used. The following is a summary of the major policies and regulations in place in Mono County and comparable jurisdictions.

### MONO COUNTY

#### REGULATORY CONTEXT – SHORT-TERM RENTALS

Mono County's General Plan Land Use Element regulates Short-Term Rentals (STRs) through a combination of Land Use goals, objectives, and policies, land use designation-specific policies, and definitions. The term "short-term rentals" is generally used for residentially designated areas, while "transient rentals" is used for non-residential areas, such as commercial and mixed use, as further detailed in the definition section below. In addition, Mono County's General Plan Land Use Element Chapter 25 contains specific STR regulations, and Chapter 26 contains specific transient lodging regulations.

The Land Use Element, last updated in 2021, identifies the potential link between short-term rentals and available workforce housing, specifically in residential areas. The county's Housing Element, last updated in 2019, indicates that "The County has taken an active approach to slowing down the rate of increase [of housing vacancy] by adopting strict short-term rental regulations in 2018 requiring a multi-tiered discretionary permit process. The County will continue to explore ways to incentivize long-term rentals over short term." The county cited the decrease in the overall number of renters in the unincorporated County and changes to occupancy rates in Census Designated Places (CDPs) in support of this regulatory approach:

*"The overall number of renters in the unincorporated area decreased from 40% of all occupied units in 1990 to 32% [in] 2010. The south county CDPs generally have very high rates of owner-occupied units, the highest being Paradise at 95.9%. North county CDPs have higher renter occupied units with Coleville the highest at 71.9% due to the marine base housing. Vacancy rates continue to increase as more units are used for second homes and short-term rental units. The overall vacancy rate in the unincorporated county increased from 34.4% in 2010 to 48.2% in 2016."*

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## CURRENT REGULATION SUMMARY

Mono County's STR regulations contain the following key components, which are also displayed in the tables below:

### DEFINITIONS

- Short-term Rentals are defined as single family units with a residential land use designations (ER, RMH, RR, SFR).
  - **Owner-Occupied:** requires the owner to live on site, or in a unit on the same parcel or a physically contiguous adjacent parcel. The owner must be present during the rental. (MCC 25.02).
  - **Non-Owner-Occupied:** applies to rentals of an entire unit or portion thereof not currently occupied by the property owner on the same parcel or a physically contiguous parcel. (MCC 25.02).
  - Further limitations on Owner-Occupied and Non-Owner Occupied are detailed in **Table 5** below.
- Transient rentals are defined as residential structures with non-residential land use designations (C, CL-M, CL-H, MU, NHP, RU, SC), or with MFR-H zoning, or located in a Transient Rental Overlay District, the General Plan land use designation that was previously used for permitting short-term rentals in the County.

### LAND USE LIMITATIONS

- STRs are conditionally permitted uses in residential land use designations: Estate Residential (ER), Rural Mobile Home (RMH), Rural Residential (RR), and Single Family Residential (SFR). That is, in order to operate a short-term rental in these designated residential areas, a discretionary use permit and a STR permit are required (see below for details).
- New STRs are NOT allowed in MFR-L or MFR-M. However, new STRs in the Interlaken, Edgewater, and Sierra Suns condominium complexes are grandfathered as existing non-conforming uses because the entire complex has historically been managed as nightly rentals, and therefore do not require discretionary permits.
- Transient Rentals are generally allowed, with proper permitting, in TRODs, in Multi-family Residential-High (MFR-H) land use, or non-residential land use designations: Commercial (C), Commercial Lodging -Moderate (CL-M) and -High (CL-H), Mixed Use (MU), Natural Habitat Protection (NHP), Rural Resort (RU), and Service Commercial (SC).

## *GEOGRAPHIC LIMITATIONS*

- In June Lake, STRs are only allowed in SFR land uses, and are not permitted in any other residential land use designations, with the exception of the existing nonconforming uses mentioned above (MCC 25.015).
- Non-Owner Occupied STRs are prohibited in Mono City, Long Valley, Tri-Valley, Paradise, and certain areas within June Lake.
- The total number of Owner Occupied STR activity permits in the upper Clark Tract of June Lake (excluding Nevada Street/Silver Meadow) may not exceed eight (8) parcels and are limited to summer rentals only.
- Mono City and Swall Meadows prohibit all STRs types.

## *PERMIT REQUIREMENTS*

- STR requirements:
  - Approval of a Use Permit through a public hearing before the Mono County Planning Commission.
  - Approval of an STR Activity Permit through a public hearing before the Board of Supervisors.
  - Existing non-conforming STRs in the MFR-L and MFR-M land use designations are permitted outright, and only require a business license and TOT Certificate.
  - During the current moratorium no new STR permits for single family residential units are allowed in any land use designation.
- Transient Rental requirements:
  - Approval via a Director Review permit for units in C, CL-M, CL-H\* with 1-3 units, Mixed Use (MU), Natural Habitat Protection (NHP), and Service Commercial (SC) land uses.
  - Approval of a Use Permit through a public hearing before the Mono County Planning Commission and ministerial approval of a Vacation Home Rental permit (VHR) for units in MFR-H, CL-M/CL-H\* with 4 or more units and RU land uses.
  - \*Transient rentals in the CL-M, CL-H where units are under individual ownership are permitted outright, and only require a business license and TOT Certificate.

## *LICENSE REQUIREMENTS*

- A valid Business License and TOT certificate is required for all short-term rental operations.

- For non-owner occupied rentals, a separate duly-licensed management company or property manager is required.

### OPERATIONAL REQUIREMENTS

- Health and Safety: Fire and carbon monoxide monitors, consideration of flammable materials, landline phone required, etc.
- Sign, Notification and Advertising Requirements: Transient rental notification posted on exterior with 24-hour contact of property owner or manager; interior notification on process for waste disposal, parking, and emergency evacuation; STR permit # must be included in all advertising.
- Occupancy: Maximum 10 persons, maximum two per bedroom.
- Parking: Requirements per Mono County General Plan, no off-site or street parking allowed.
- Trash and Solid Waste Removal: Available trash receptacles, must be removed at least once a week during period rented.
- Snow Removal: the property owner is required to remove snow from walkways and driveways prior to rental period.
- Other: Dark Sky Regulations for lighting, including updating fixtures if needed to comply; owner or manager must be available to respond within an hour; hidden key is required for emergencies; quiet hours apply from 10pm to 7am; and outdoor amplified sound is prohibited at all times.

### RENEWALS

- Short-Term Rental Activity permits expire on August 31st of each year unless renewed or revoked (MCC 5.65.080).
- Vacation Home Rental permits expire if the property changes ownership.
- Business Licenses and TOT Certificates require annual renewal.

### COSTS

- One-Time Fees: All permits, including but not limited to STR Activity permit, Use permit, and Vacation Home Rental permit, and required inspections, incur a fee.
- Housing Mitigation Fee: All new STRs and visitor accommodations must pay a commercial linkage fee (aka housing mitigation fee), consistent with MCC Chapter 15.40.
- Annual Fees: All annual renewals of STR Activity permits are subject to fees.
- Taxes: A valid Transient Occupancy Tax certificate is required for all short-term rental operations.

**Table 3: Permit Requirements, by Land Use Area**

PERMIT REQUIREMENTS, BY LAND USE AREA				
	STR Activity Permit- (BOS)	Use Permit- (PC)	VHR Permit- (County Staff)	Business License & TOT
ER, RMH, RR, SFR	✓	✓		✓
MFR-L, MFR-M				✓**
C, MU, SC		DR permit		✓
NHP, CL-M/CL-H 1-3 UNITS		DR permit		✓*
MFR-H		✓	✓	✓
CL-M/CL-H 4+ UNITS		✓	✓	✓*
*Where units are owned individually, only require a business license and TOT Certificate				
**Existing non-conforming uses, no new complexes allowed				

**Table 4. Owner-Occupied/ Non-Owner Occupied STRs Allowed, By Area**

OWNER-OCCUPIED / NON-OWNER-OCCUPIED STRS ALLOWED, BY AREA		
	OWNER OCCUPIED	NON-OWNER OCCUPIED
Long Valley, Tri-Valley, Paradise	✓	
Swall Meadows		
Mono City		
Mono Basin (excluding Mono City)	✓	✓
Bridgeport Valley	✓	✓
Antelope Valley	✓	✓
June Lake		
Upper Clark Tract (excluding Nevada Street/Silver Meadow)	Limited to 8, summer only	
Petersen Tract		
Williams Tract		
Hwy 158 Hillside	✓	
Highlands		
Other - Nevada St, Silver Meadow, Dream Mtn, Leonard Ave	✓	✓
Areas not listed, including Twin Lakes and Virginia Lakes, are allowed both types of short-term rentals subject to Use Permit and Activity Permit. Some areas may have seasonal restrictions due to avalanche hazards.		

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## POLICY CONTEXT – HOUSING

Mono County's General Plan contains housing-related goals and policies that identify strategies to increase and maintain available housing stock unrelated to the regulation of short-term rentals. The following is an overview of the County's housing policies to provide context for the issue of housing in the county overall.

### *HOUSING GOALS*

Mono County's Housing Element, updated in 2019, includes four goals and associated programs and objectives. Goals 1 and 2 call for increasing the overall housing supply, and specifically the supply of "community housing" which is to provide adequate, affordable housing for long-term residents. Goal 3 is to retain existing community housing, which includes incentives and resources to rehabilitate existing housing stock for the purposes of long-term rental and monitoring the conversion of permanent housing or long-term rental housing into transient rentals, particularly within the Transient Rental Overlay Districts.

Mono County's Land Use Element includes goals specific to each planning area, and many include specific Housing Goals. For example, June Lake's Housing Goal 14 calls for providing a diverse, affordable, and quality housing stock that is available year-round. Associated objectives include requiring new developments to provide a share of affordable workforce housing to meet any associated increase in demand, coordinating with developers to incentivize the creation of new workforce and affordable units, and engaging with the United States Forest Service (USFS) to encourage an update in their rental policy agreements.

### *HOUSING MITIGATION REQUIREMENTS*

Chapter 15.40 of the Mono County Code identifies the lack of available housing stock in the county as a problem, and outlines Housing Mitigation Requirements for all new developments, including a calculation of affordable units or payment of an in-lieu fee. Mono County also applies a commercial linkage fee to new short-term rental activity.

### *ACCESSORY DWELLING UNITS*

Mono County encourages the development of ADUs as a part of its goal to increase the overall housing supply, and related resources include providing pre-approved construction plans through the county website. The County currently prohibits short-term rentals in all new accessory dwelling units, but three existing ADUs in the county are allowed as STRs as existing non-conforming uses.

## POLICY COMPARISON

Nineteen similar jurisdictions' short-term rental regulations were analyzed to compare the policy rationale and regulatory approach relative to Mono County. The jurisdictions were in California, Oregon, Idaho, Wyoming, and Colorado and have similarities to Mono County in terms of mountainous geography, tourism as a major component of the economy, and the presence of rural areas with increasing housing costs.

Three jurisdictions do not have any permit, license, or transient tax requirements for short term rental activity (Eagle County, CO; Gunnison County, CO; and Blaine County, ID) and are not detailed in the charts below. At the time of publishing, Eagle County is in the process of developing regulations but has not yet passed any related ordinances.

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## POLICY RATIONALE

Each comparison jurisdiction has individual purposes for regulating Short-Term Rentals. However, rationale generally falls into the following categories, as shown in

**Table 6:**

- Health and Safety, which may refer to the general wellness of the surrounding community, as well as safety concerns for tourists such as transient occupants in rural zones that are potentially beyond emergency access.
- Mitigating Nuisances, which may include concerns about trash, parking, noise, litter, etc. associated with short-term rental occupants.
- Preservation of Community Character, which is a general term usually used to describe the look and feel of residential neighborhoods but not specifically defined.
- Effect on Workforce Housing, such that STRs are considered to have a negative impact on availability.
- Environmental Concerns, including the degradation or disruption of the surrounding environment or ecosystems, and/or the unsustainable use of resources such as water and electricity.
- Tourism/Rental Needs, where the jurisdiction recognizes the need for short-term rentals and has implemented a system to support it.

**Table 5. Policy Rationale, by Jurisdiction<sup>3</sup>**

POLICY RATIONALE, BY JURISDICTION						
	Health and Safety	Mitigating Nuisances	Preservation of Community Character	Effect on Workforce Housing	Environmental Concerns	Tourism/Rental Needs
Mono County	✓	✓	✓	✓		✓
Mammoth Lakes	✓	✓		✓		✓
Truckee	✓	✓		✓	✓	
Placer County	✓	✓			✓	
South Lake Tahoe	✓	✓		✓		
City of Big Bear Lake			✓			✓
Summit County			✓			
Aspen	✓			✓	✓	✓
Pitkin County	✓			✓	✓	
Steamboat Springs			✓	✓		
Routt County				✓		
Telluride			✓			
San Miguel County	✓					
Ketchum	✓		✓			✓
Bend			✓			
Jackson	✓		✓	✓	✓	
Teton County	✓		✓	✓	✓	

<sup>3</sup> Policy rationale is based on the most up-to-date code available and may not capture rationale of previous iterations or all related policy.

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## STR REGULATION

In general, the comparison jurisdictions' STR permit and/or license requirements vary based on land use designations or rental type.

### TERMS

- **Short-term Rentals (STRs):** For the purpose of this comparison section, short-term rental is used to describe any residential unit that is used for the purpose of overnight rentals. Some jurisdictions, such as Mono County, differentiate these rentals based on land use, owner- and non-owner-occupied, etc.
- **Permit:** This refers to a land-based approval that allows for a particular use of a site. Sub-categories may include Use Permits, Activity Permits, and more. These may or may not run with the land and/or be transferable to different property owners. Typically, elected officials do not review or approve/deny permits, although Mono County Board of Supervisors must approve Short-Term Rental Activity permits in residential designations.
- **Use Permit:** This is a discretionary land use permit that requires a public hearing and typically is approved by a Zoning Administrator or Planning Commission.
- **Vacation Home Rental Permit:** Some jurisdictions use this term instead of short-term rental (e.g., South Lake Tahoe). In Mono County, this type of permit refers to a permit for a residential structure located in a non-residential land use designation that is issued by staff.
- **Transient Rental Certificate:** This is a term unique to the Town of Truckee and is required to operate an STR. Rather than in most jurisdictions which require a permit, in the case of Truckee the TR certificate is attached to an individual is transferable.
- **License:** Typically, this is a legal document issued by a jurisdiction that is attached to an individual and is not transferable, such as a Business License.
- **Hosted vs Non-Hosted Rentals:** Some jurisdictions differentiate STRs where the owner is present in the unit during the rental, such as through the rental of a private bedroom within a home, and the rental of an entire unit without the presence of the owner. Another variation is the "occupied" vs "non-occupied" rental. While the legal definition differs depending on the phrase used and what language the jurisdiction uses to define it, for the purposes of the comparison both types are included under "hosted vs non-hosted".
- **Transient Zoning Overlay:** Some jurisdictions have created a specific zone or set of zones that override existing land use designations to allow for STR activity. Terms in this category may include Transient Rental Ordinance District, Lodging Overlay, and Planned Resort Zone.

- **Housing Mitigation**

- **One-Time Fee:** This may be framed as a housing mitigation fee, a housing impact fee, or a housing in-lieu fee, all of which are under the same category for the purpose of this comparison. This refers to a commercial linkage fee as a requirement for new developments, usually as an alternative to creating additional affordable housing units, and is a policy response used to address a lack of affordable housing in a jurisdiction.
- **Ongoing Fees:** This may be an annual fee or ongoing tax for certain uses or activities that are considered to have an impact on housing.

## COMPARISON OVERVIEW

**STR Permit Requirements:** Out of the 16 jurisdictions included, 10 require some type of permit to operate an STR. As noted above, Truckee requires a Transient Rental Certificate. In Pitkin County, Steamboat Springs, and Bend, an STR Operating license is required.

- **Use Permit:** Two jurisdictions require a Use Permit for certain types of STRs in addition to other permits and/or licenses. In Bend, all STR types require a Use Permit except for those in a specific list of communities. In Mono County, all STR types require a Use Permit except for those in a Commercial, Mixed Use, and Service Commercial designation, and Commercial Lodging- High, or Natural Habitat Protection designation with 1-3 units (not individually owned), all of which require a Director Review permit. Jackson, WY requires a Use Permit as the primary permit for STR operation.

**Fees:** All jurisdictions require a fee for permit processing. Some may require a deposit, and some may require additional fees including an annual renewal fee or annual inspection fees. Fees range from \$100 permit fee to \$1,500 or more when accounting for permits and inspections.

**Permit Renewals:** Of the 13 that require a permit or license, 11 jurisdictions require an annual renewal. San Miguel County requires a renewal every 2 years. The Town of Truckee requires an annual renewal for the Transient Rental Certificate.

**Transferability:** For most jurisdictions, STR permits are non-transferable if the unit is sold, except with some exceptions such as to immediate family members. In these cases, new owners must re-apply for required STR permits. In Truckee, Transient Occupancy Certificates are transferable between both units and owners through the Short-Term Rental Workforce Housing Token Program.

**Waiting Period:** A few jurisdictions implement a waiting period after the purchase of a home before being able to apply for an STR permit. In Truckee and South Lake Tahoe, for example, new property owners must wait one year before applying. The waiting period reduces the ability to commodify the residential unit because it cannot generate immediate income.

### **Unit/ Rental Type Limitations:**

- **Hosted Rentals:** Seven jurisdictions distinguish between hosted and non-hosted rentals where the latter type is either more limited by zone or total number, or have more permit and /or license requirements. In Steamboat Springs, Placer County, South Lake Tahoe, and Aspen, hosted STRS are exempt from any permit caps.
- **MFU vs SFU:** Some jurisdictions identified make a process distinction between single-family units and multi-family units. As described above, Mono County has some process differences for individually owned MFUs in non-residential land uses, where only a Business license and TOT certificate is required, whereas Truckee and Placer County prohibit STRs in multi-family units.

**Accessory Dwelling Units:** STRs are not allowed in Accessory Dwelling Units in Mono County, Truckee, Mammoth Lakes, San Miguel County, Teton County, Placer County, or in Steamboat Springs, where they are referred to as Secondary Units.

In Summit County, an occupied rental can apply to a single-family home if the Qualified Occupant resides in an ADU on the same parcel, but the ADU itself cannot be rented as an STR.

**Land Use Limitations:** Many jurisdictions regulate STRs based on the land use designation of the site. For example, in Mammoth Lakes no transient rentals are allowed in residential Multi-family 1, Residential Single Family, or Rural Residential land use zones. Routt County only allows STRs in commercial land use zones, and in South Lake Tahoe, no new STR permits can be issued in residential land use zones and existing permits will be phased out.

- **Transient Zoning Overlay:** Summit County, Jackson, and Teton County have all implemented some form of a zoning overlay, which specifically allows STRs in certain zones/ land use designations that they would not otherwise be allowed. While similar to Mono County's past practice (TRODs), the other jurisdictions proactively created the zoning overlay, whereas Mono County allowed applicants to propose the overlay area through a discretionary approval process.

**Permit Caps:** Truckee and Placer County have set a numeric cap on STR permits allowed in the jurisdiction; in Truckee a waitlist has been established, and as of the time of publishing Placer County has not yet reached its capacity. In Steamboat Springs, the city has been divided into Zone A, which is the STR Overlay Zone and has no permit limits, Zone B, where STR permits have been capped at the current number, and Zone C where STR permits are prohibited. Aspen implements permit caps for non-owner occupied STRs in certain zones, and South Lake Tahoe caps the total number of hosted rentals allowed.

**Regulations on Time Rented:** Telluride, Jackson, Pitkin County, and Summit County limit the number of rentals and number of days rented allowed for STRs. In Telluride, for example STRs cannot exceed three separate rentals or a total of 29 days of rental for STRs in residential zones, and in Aspen, Owner-Occupied STRs are limited to 120 rented nights. Some jurisdictions, like Ketchum, require a minimum stay of two nights.

**Limit on Permits per Individual:** Mono County is the only jurisdiction that does not allow an individual to have more than one STR Permit and where a permit applies to only one unit. In Aspen, for example, an owner may apply for one permit for multiple STR units.

**Proximity Limits:** Bend, Oregon for example does not allow a new STR to be permitted within 500 feet of an existing permitted STR.

**Operational Requirements:** All jurisdictions that had some STR requirements also regulate the STR activity and operations. While the range and specific categories vary, most standards address health and safety issues, potential nuisances, minimum on-site parking, noise levels, and waste disposal.

- **Notice/Posting:** All jurisdictions with permit requirements include some noticing requirements. Most require STR units to have their permits posted on-site on the exterior of the site, and some, such as Mono County, require online postings to include permit numbers.
- **Occupancy:** Many jurisdictions include maximum occupancy standards. Similar to Mono County, for example, San Miguel County limits the maximum occupancy to 10 people and two per bedroom.
- **Other:** Snow removal by owner, fire and carbon monoxide monitoring, evacuation plans, a landline phone, and manager or owner available within a reasonable distance were all common requirements in the jurisdictions studied.

**Business License Requirements:** Telluride requires a specific STR business license as the primary regulation on STRs, but no additional permits. In other cases, a business license is required in addition to other permits such as in Mono County, Mammoth Lakes, Aspen, and Jackson.

**Tax Requirements:** With the exception of the three jurisdictions with no STR requirements, all other jurisdictions required registering for a tax for all STR activity. In California, this is referred to as a Transient Occupancy Tax (TOT).

**Housing Mitigation Requirements:** 16 of the jurisdictions included have adopted some type of Housing Mitigation Requirements for new developments, including an in-lieu fee option. Mono County requires a Housing Mitigation fee for all new STRs, and Telluride requires an ongoing Affordable Housing Tax for all STR activity. Aspen requires an ongoing tax for all STR activity, 70% of the revenue of which will be used for affordable housing programs.

**Table 6. STR Requirements, by Jurisdiction<sup>4</sup>**

	STR Permit	Use Permit	Business License	Hosted vs Non-Hosted	Annual Renewal	Permit Cap	Zoning Overlay	TOT	STR Housing Mitigation
Mono County	✓	✓	✓	✓	✓		✓	✓	✓*
Mammoth Lakes			✓					✓	
Truckee	✓ <sup>^</sup>				✓	✓		✓	
Placer County	✓			✓	✓	✓		✓	
South Lake Tahoe	✓			✓	✓	✓		✓	
City of Big Bear Lake	✓				✓			✓	
Summit County	✓			✓	✓		✓	✓	
Aspen	✓		✓	✓	✓	✓		✓	✓*
Pitkin County	✓ <sup>^</sup>				✓			✓	
Steamboat Springs	✓ <sup>^</sup>			✓	✓	✓	✓	✓	
Routt County								✓	
Telluride			✓					✓	✓*
San Miguel County	✓							✓	
Ketchum	✓				✓			✓	
Bend	✓ <sup>^</sup>	✓		✓	✓			✓	
Jackson		✓	✓		✓ <sup>**</sup>		✓	✓	
Teton County		✓ <sup>~</sup>	✓				✓	✓	

<sup>^</sup>The Town of Truckee issues a Transient Lodging Certificate; Pitkin County, Steam Springs, and Bend require an STR License.

\*In Mono County, this is a one-time fee; In Aspen, Telluride this is an ongoing tax.

\*\*Annual renewal only required for units outside of the lodging overlay

<sup>~</sup>STRs are restricted to a pre-determined list of communities within the Lodging Overlay. New STRs require a Use Permit while some exist as non-conforming uses with no permit required.

<sup>4</sup> STR regulations are based on the most up-to-date code available and may not reflect ordinances in the drafting stages or code that has not been updated online.

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## KEY HIGHLIGHTS

### *STRICTER REGULATORY APPROACHES*

Of the jurisdictions included, Mono County has one of the highest levels of permitting and license requirements for STRs in residential land uses, particularly given the two permits required and the need for Board of Supervisors approval of an activity permit. However, the County is more permissive in other ways, such as in the case of MFUs in the Commercial Lodging Zones, when units are individually owned, only a Business License and a TOT certificate are required for STR activity.

In comparison, Mammoth Lakes and Routt County have relatively few permit requirements for STRs while they broadly restrict where STRs are allowed or not allowed outright. Truckee and Steamboat Springs have both put a hold on any new STR permitting, and Teton County prohibits short-term rentals outright except for a predefined list of specific cabins, condos, and apartment complexes. All these jurisdictions include a concern about workforce housing as a rationale for regulating STRs, and it follows that the resulting policy is stricter regulation, especially in residential zones.

### *WORKFORCE HOUSING PRIORITY HIGHLIGHTS*

Some jurisdictions have identified a link between STR activity and a shortage of workforce housing, and are actively restricting STRs to address the issue, such as Routt County based on their 2022 Master Plan. Jackson and the surrounding Teton County are an example of municipal and county governments creating a joint General Plan that includes workforce housing as a priority. The two jurisdictions regulate short-term rentals and operate a specific Workforce Housing Program which reserves a certain stock of housing, with both ownership and rental options, for households who have at least one member who is a full-time employee of a local business.

The Town of Truckee takes a unique approach to the issue of workforce housing, while also recognizing the demand for tourist accommodations as a resort town. The Town uses a Short-Term Rental Workforce Housing Token program to incentivize workforce housing. Property owners that make units available for rental for workforce housing may receive a “token” in the form of a Transient Lodging Certificate, which can then be used for short-term rental activity in one unit. The Town also implemented the Workforce Rental Grant Program to incentivize property owners to rent long-term to local workers. Participating property owners receive grants ranging from \$1,000 to \$10,000 and free tenant-matching services. Mammoth Lakes also hosts a workforce renter matching program, in addition to a number of initiatives under their Housing Now! Program such as the Bridge program, which purchases market rate homes that are then deed-restricted and sold to qualifying participants at a subsidized rate.

# PART 4

## ECONOMIC ANALYSIS

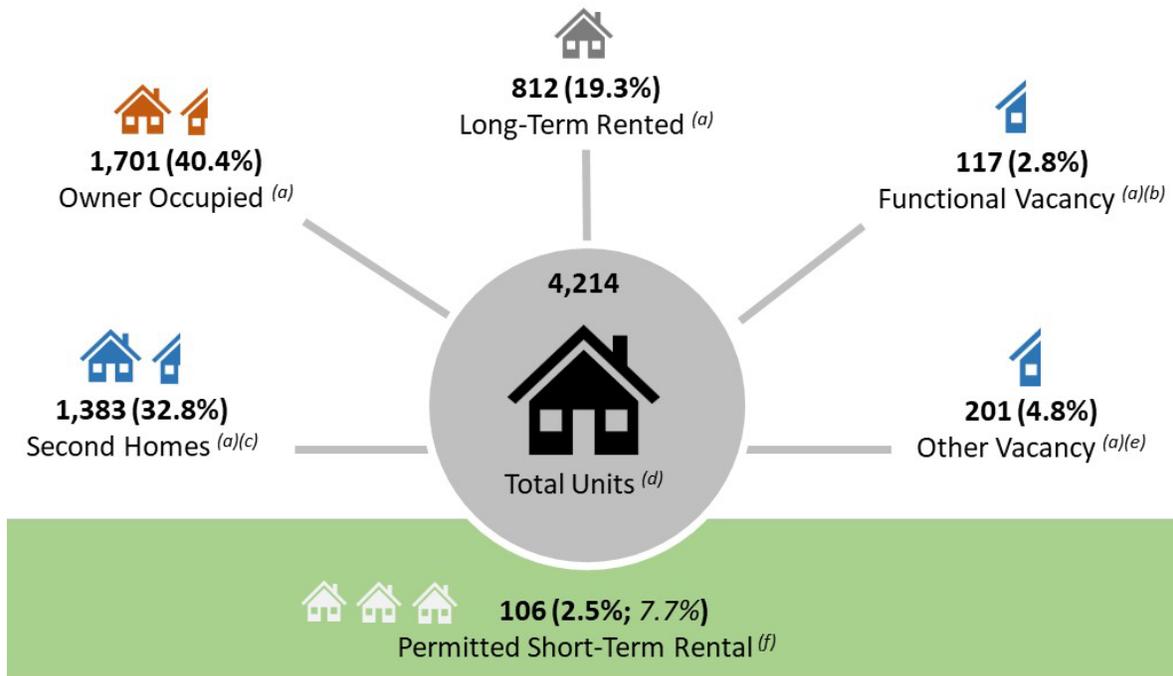
### HOUSING MARKET CONDITIONS AND TRENDS

The following section summarizes recent conditions and trends in the Mono County housing market. The analysis is primarily focused on the unincorporated county as a whole, though additional detail is provided where possible for the County Planning Areas and other related geographies.

#### *HOUSING STOCK UTILIZATION*

**Figure 2** illustrates the estimated distribution of the Mono County housing stock by use. The figure leverages the housing unit total provided by the California Department of Finance (DOF) for 2023 and the distribution of housing units by occupancy status from the 2020 Decennial Census. According to these estimates, nearly 60 percent of the unincorporated Mono County housing stock was occupied full-time. Of the housing units in the unincorporated area that were occupied full-time, roughly one-third were rented, and the remainder were owner occupied. Around 40 percent of the unincorporated area housing stock was vacant, with more than 80 percent of the vacant housing stock being vacant for seasonal and occasional use (i.e., second homes). Mono County reports that there were 106 registered STRs in the unincorporated county as of December 2023. These units represent only around 2.4 percent of the total housing stock or 7.7 percent of the housing stock held vacant for seasonal and occasional use. By comparison, STRs in the Town of Mammoth Lakes account for an estimated 35.6 percent of the housing stock.

**Figure 2. Housing Stock Utilization, 2023 est.**



Note:

(a) Based on the distribution of vacant housing units by type as reported in the 2020 Decennial Census, multiplied by the total number of housing units, as reported by the California Department of Finance for 2023.

(b) Includes units that are vacant as a result of being available for rent and for-sale.

(c) Includes units that are held vacant for seasonal and occasional use.

(d) As reported by the California Department of Finance for 2023.

(e) Includes units that are rented or sold, but not yet reoccupied, as well as units held vacant for migrant workers, and units that fall into the Census Bureau's "other vacant" definition.

(f) As reported by Mono County as of December 2023.

Source: U.S. Census Bureau, 2020 Decennial Census; California Department of Finance, Mono County; BAE, June 2023.

## HOUSING VACANCY CHARACTERISTICS

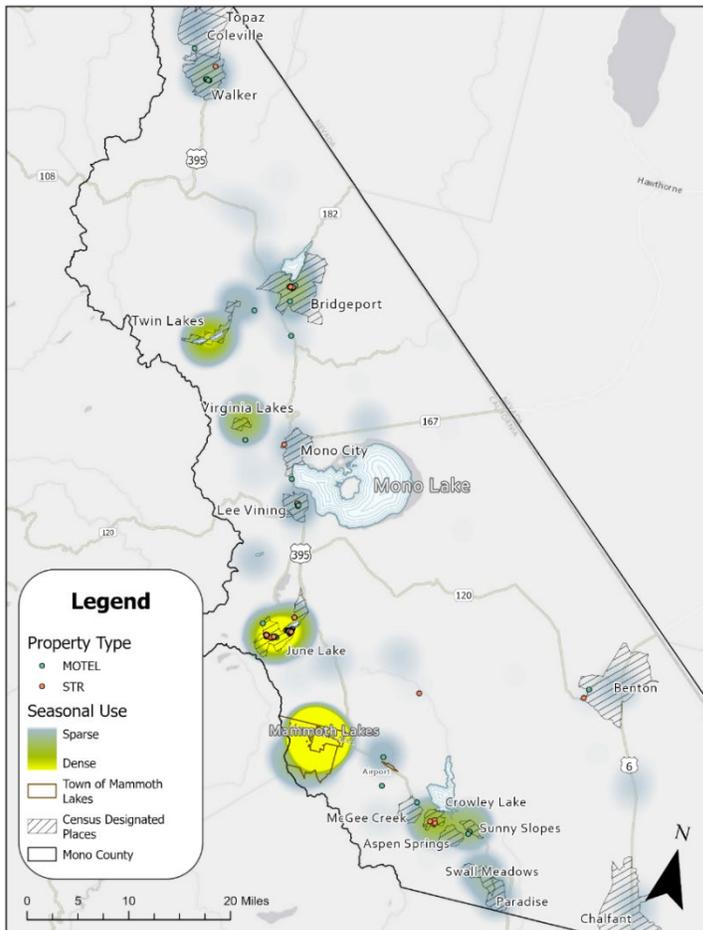
**Table 8** reports the distribution of housing units in the Town of Mammoth Lakes and unincorporated Mono County by occupancy and vacancy status, as reported by the 2010 and 2020 Decennial Census. According to this data, there were 4,259 total housing units in unincorporated Mono County in 2020, which represents a loss of 27 housing units (roughly 0.6 percent) since 2010. DOF estimates that between 2020 and 2023, the unincorporated area housing stock contracted further to 4,214 units, which represents a loss of another 45 units (roughly 1.1 percent). DOF estimates that housing vacancy decreased by four tenths of a percent between 2010 and 2020, then increased by around one tenth of a percent to an average of 40.4 percent as of January 2023.



## SEASONAL VACANCY

Over the decade, the data indicate that the total number of seasonally occupied housing units decreased slightly (i.e., four units) within the unincorporated area, though the share of the housing stock held for seasonal or occasional use remained roughly constant. Nonetheless, seasonal vacancy varies widely throughout Mono County, with some communities experiencing increases, while others experienced contractions in the number of seasonally vacant units. **Figure 3** illustrates concentrations of seasonal vacant housing in Mono County based on Census Block level data from the 2020 Decennial Census. The figure shows that most of the seasonal vacancy is concentrated in Mammoth Lakes and June Lake, with smaller concentrations in Crowley, Bridgeport (including Twin and Virginia Lakes), and Walker.<sup>5</sup>

**Figure 3: Seasonal Vacancy Heat Map with STRs/Motels, 2020 Decennial Census**



Sources: U.S. Census Bureau, Decennial Census 2020; BAE, 2023.

<sup>5</sup> Seasonal use in the areas of Twin Lakes and Virginia Lakes may be affected by avalanche hazards, and in Virginia Lakes also due seasonal road closures.

**Appendix A** also provides additional information on the occupancy and vacancy status of housing units located within Census Designated Places (CDPs) located within Mono County in 2010 and 2020. The data indicate that Topaz, Crowley Lake, Mono City, Paradise, Chalfant, and Aspen Springs added housing units over the decade, while Coleville, June Lake, Bridgeport, McGee Creek, and Benton lost housing units<sup>6</sup>. The number of full-time occupied housing units also decreased in most of the communities that lost housing units. Seasonal vacancy increased in some communities, while decreasing in others. The communities with the largest increase in seasonal vacancy include Bridgeport (34 units), Crowley Lake (11 units), Lee Vining (10 units), Coleville (9 units), Paradise (9 units), Sunny Slopes (4 units), and Swall Meadows (1 unit). Seasonal vacancy in June Lake, the unincorporated community with the highest concentration of both seasonal vacancy and STRs, remained virtually unchanged over the decade.

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## FOR-SALE HOUSING PRICES

**Table 9** reports characteristics associated with single-family and condominium home sales in unincorporated Mono County from 2019 through November 2023, collected from ListSource, a private data vendor. The data indicates that the volume of single-family home sales remained fairly steady from 2019 through 2021, then decreased somewhat in 2022 and 2023.

Around 90 percent of all home sales in the unincorporated parts of Mono County over the study period were single-family homes. The median single-family home sale price over this period increased by 56 percent, from \$349,000 in 2019 to almost \$580,000 in 2023. Over this period, the median unit size for single family home sales remained fairly stable, suggesting that the observed increase in price is a function of market demand and unit quality, versus differences in unit size. The per square foot sale price for single-family homes also increased by around 46 percent from \$233 per square foot in 2019 to \$342 per square foot in 2023.

The unincorporated area saw similar trends in condominium sales between 2019 and 2023, compared to single-family home sales. Sales volumes remained steady in 2019 through 2021, then dropped somewhat in 2022 and 2023, corresponding with increasing interest rates. The median condominium sale price increased rapidly from \$414,500 in 2019 to \$609,000 in 2023. Notably, the median sale price for condominium units was consistently higher than for single-family homes, which may be due to the concentration of condominium units near Mammoth Lakes, Crowley, and June Lake, but may also be influenced by the County's current regulatory structure pertaining to STRs. The data indicates that while the median condominium sale price increased by 47 percent over this period, the median unit size also increased significantly. This indicates that a portion of the change in the median condominium sale price is likely attributable to differences in unit size. The median price per square foot fluctuated significantly from year to year over this period, which is likely due to significant differences in the attributes of the sold inventory recognizing the very limited condominium sales volumes in unincorporated Mono County.

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<sup>6</sup> While the reason for loss of housing units has not been captured in this data, it should be noted that the Mountain View fire of 2020 affected structures in the Coleville and Walker area.

**Table 8. Home Sales Characteristics by Unit Type, Unincorporated Mono County, 2019 Through November 2023**

<b>Single-Family Residences</b>					
<b>Sale Price Range</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>YTD 2023</b>
Less than \$150,000	15	3	5	2	5
\$150,000-\$249,999	12	10	12	4	3
\$250,000-\$349,999	15	15	9	8	6
\$350,000-\$449,999	11	21	11	7	5
\$450,000-\$549,999	9	11	6	6	6
\$550,000-\$649,999	11	10	7	16	9
\$650,000-\$749,999	2	7	6	4	7
\$750,000-\$849,999	5	3	13	6	8
\$850,000 or more	2	11	12	14	6
<b>Total, SFR Sales</b>	<b>82</b>	<b>91</b>	<b>81</b>	<b>67</b>	<b>55</b>
<i>% of Total</i>	89%	89%	87%	91%	92%
<b>Median Sale Price</b>	\$349,000	\$410,000	\$504,500	\$597,500	\$579,000
<b>Average Sale Price</b>	\$376,176	\$498,341	\$545,288	\$637,826	\$562,191
<b>Maximum Sale Price</b>	\$1,000,000	\$1,350,000	\$1,287,500	\$1,782,000	\$1,460,000
<b>Minimum Sale Price</b>	\$45,000	\$80,000	\$50,000	\$99,000	\$52,000
<b>Median Price per sq. ft.</b>	\$233	\$286	\$321	\$346	\$342
<b>Median Living Area (sq. ft.)</b>	1,620	1,718	1,746	1,855	1,678
<b>Condominium</b>					
<b>Sale Price Range</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>YTD 2023</b>
Less than \$150,000	0	0	0	0	0
\$150,000-\$249,999	0	1	0	0	0
\$250,000-\$349,999	3	0	0	0	0
\$350,000-\$449,999	3	3	5	2	0
\$450,000-\$549,999	3	6	5	0	0
\$550,000-\$649,999	1	1	0	0	3
\$650,000-\$749,999	0	0	2	2	2
\$750,000-\$849,999	0	0	0	3	0
\$850,000 or more	0	0	0	0	0
<b>Total, Condominium Sales</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>7</b>	<b>5</b>
<i>% of Total</i>	11%	11%	13%	9%	8%
<b>Median Sale Price</b>	\$414,500	\$450,000	\$494,500	\$690,000	\$609,000
<b>Average Sale Price</b>	\$430,150	\$454,545	\$499,833	\$642,429	\$626,800
<b>Maximum Sale Price</b>	\$600,000	\$640,000	\$699,000	\$820,000	\$674,000
<b>Minimum Sale Price</b>	\$319,500	\$240,000	\$389,000	\$350,000	\$590,000
<b>Median Price per sq. ft.</b>	\$481	\$576	\$393	\$549	\$479
<b>Median Living Area (sq. ft.)</b>	1,029	813	1,004	1,250	1,232

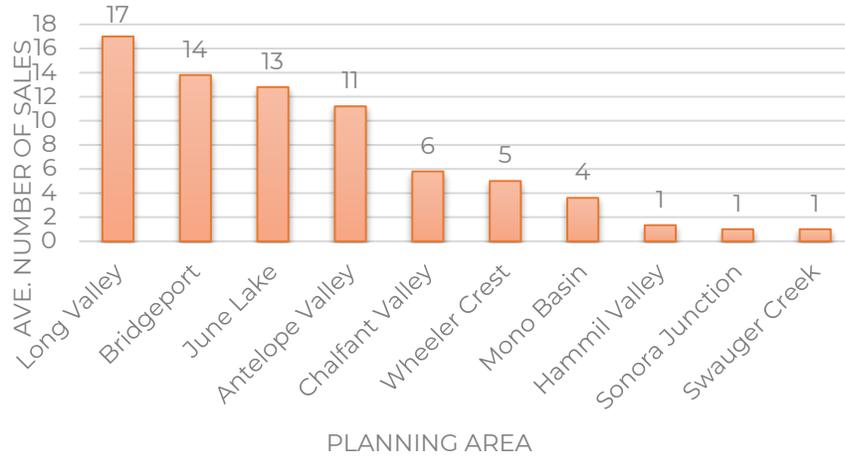
Note:

(a) Data reflects single-family and condominium sold between January and November 2023.

Sources: ListSource; BAE, 2023.

## SINGLE FAMILY HOME SALES VOLUMES BY PLANNING AREA, PRICE

**Figure 4: Average Annual Single-Family Home Sales Volumes by Planning Area, 2019 Through November 2023**



Notes:

(a) There were no reported single-family home sales in the Benton, Benton Hot Springs, Bodie Hills, Mammoth Vicinity, Oasis, and Upper Owens Planning Areas. Sources: ListSource; BAE, 2023.

**Figure 4** illustrates the average number of single-family home sales that occurred per year between 2019 and November 2023 by County Planning Area. According to this data, the Long Valley, Bridgeport, June Lake, and Antelope Valley Planning Areas had the highest numbers of single-family home sales at between 10 and 20 sales per year. The remaining planning areas show an average of around five or fewer sales per year.

**Figure 5: Median Single-Family Home Sale Price by Planning Area, \$,000, January to November 2023**



Sources: ListSource; BAE, 2023.

**Figures 4 and 5** illustrate the median single-family sale price and price per square foot by County Planning Area. The data indicate that in gross terms, the County Planning Areas with the highest median single-family home prices in 2023 (January through November) include Wheeler Crest, Long Valley, June Lake, and Swauger Creek. The areas with the lowest median sale prices were Antelope Valley and Chalfant Valley.

**Figure 5: Median Per Square Foot Single-Family Sale Price by Planning Area, January to November 2023**



Notes:

(a) There were no reported single-family home sales in the Benton, Benton Hot Springs, Bodie Hills, Hammil Valley, Mammoth Vicinity, Oasis, and Upper Owens Planning Areas. Sources: ListSource; BAE, 2023.

On a price per square foot basis, the area with the highest average median price was June Lake, with a median price of \$443 per square foot in 2023, followed by Long Valley at \$419 per square foot. Units sold in Wheeler Crest and the Mono Basin had per square foot prices in the mid- to high-\$300s, while Bridgeport and Antelope Valley had prices in the \$200 to \$300 range. Units in Swauger Creek and Chalfant were priced at under \$200 per square foot of living area.

## CONDOMINIUM SALES BY PLANNING AREA

**Table 10**, on the following page, reports the pricing of condominium sales by Planning Area, between 2019 and November 2023. According to this data, condominium sales occurred in only three Planning Areas, including June Lake, Long Valley, and the Mammoth Vicinity. Each area saw between three and four sales per year on average, with the Mammoth Vicinity showing the highest single year sales total at eight units in 2020. As of 2023, the median gross sale price for condominium units was fairly similar across all three areas, though the median sale price per square foot varied significantly.

Units in the Mammoth Vicinity, which includes the Crowley area, had the highest median per square foot sale price at more than \$1,000 a square foot, compared to \$479 in June Lake and \$381 in Long Valley. Although prices fluctuate from year-to-year, all three areas saw notable price appreciation over the study period. For example, the median per square foot sale price increased by 108 percent in Long Valley, 72 percent in the Mammoth Vicinity, and 47 percent in June Lake.

**Table 9. Condominium Sales Trends by Planning Area, 2019 to November 2023**

<b>June Lake Planning Area</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Number of Sales	3	1	n.a.	5	1
Median Sale Price	\$408,000	\$450,000	n.a.	\$673,000	\$590,000
Median Price Per Sq. Ft.	\$325	\$266	n.a.	\$430	\$479
Median Sq. Ft.	1,256	1,689	n.a.	1,256	1,232
<b>Long Valley Planning Area</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Number of Sales	2	2	7	n.a.	2
Median Sale Price	\$319,750	\$418,000	\$500,000	n.a.	\$667,000
Median Price Per Sq. Ft.	\$183	\$238	\$311	n.a.	\$381
Median Sq. Ft.	1,755	1,755	\$1,611	n.a.	1,755
<b>Mammoth Vicinity Planning Area</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Number of Sales	5	8	5	2	2
Median Sale Price	\$488,000	\$487,500	\$445,000	\$815,000	\$605,000
Median Price Per Sq. Ft.	\$630	\$629	\$795	\$971	\$1,080
Median Sq. Ft.	813	813	560	840	560

Notes:

- (a) There were no reported condominium sales in the Antelope Valley, Bridgeport, Chalfant Valley, Hammil Valley, Mono Basin, Sonora Junction, Sauger Creek, and the Wheeler Crest Planning Areas.
- (b) There were no reported home sales, either condominium or single-family, in the Benton, Benton Hot Springs, Bodie Hills, Oasis, and Upper Owens Planning Areas. Sources: ListSource; BAE, 2023.

## AFFORDABLE HOME PURCHASE PRICE

**Table 11**, on the following pages, reports home purchase prices that can be considered affordable based on standard mortgage lending assumptions and data provided by the California Department of Housing and Community Development (HCD). Assuming a 20 percent downpayment and an interest rate of 6.8 percent, the estimated income needed to afford a median priced housing unit, either single-family or condominium, priced around \$600,000 would be approximately \$150,000 per year, which is equal to around 175 percent of the area median family income (MFI) as estimated by HCD. Notably, at this pricing level, a median priced housing unit would fall under the 2023 conforming loan limits for Mono County.

The calculations reported in the table assume a 20 percent downpayment, which would require the purchaser to provide \$120,000 up front. This is likely to be a challenge for many workforce households. Decreasing the downpayment amount to five percent of the purchase price would decrease the downpayment requirement to only \$30,000, but would increase the monthly payment to nearly \$4,396, which would require an income of roughly \$175,000 per year, or 183 percent of the area MFI. Downpayment assistance programs are available, though many are associated with State and Federal funding sources which can have strict eligibility requirements that often preclude middle-income households from participating.

**Table 10. Affordable For-Sale Housing Prices, Mono County, 2023 (Page 1 of 2)**

<b>2023 Income Limits (a)</b>	<b>Persons Per Household</b>				
	<b>One</b>	<b>Two</b>	<b>Three</b>	<b>Four</b>	<b>Five</b>
Acutely Low -Income (15% MFI)	\$10,050	\$11,500	\$12,900	\$14,350	\$15,500
Extremely Low -Income (30% MFI)	\$17,850	\$20,400	\$24,860	\$30,000	\$35,140
Very Low -Income (50% MFI)	\$29,750	\$34,000	\$38,250	\$42,500	\$45,900
Low -Income (80% MFI)	\$47,600	\$54,400	\$61,200	\$68,000	\$73,450
<b>Median Income (100% MFI)</b>	<b>\$67,050</b>	<b>\$76,650</b>	<b>\$86,200</b>	<b>\$95,800</b>	<b>\$103,450</b>
Moderate-Income (120% MFI)	\$80,450	\$91,950	\$103,450	\$114,950	\$124,150
Achievable (175% MFI)(b)	\$117,338	\$134,138	\$150,850	\$167,650	\$181,038

<b>1-Person Household</b>	<b>Amount Avail. for Housing</b>	<b>Principal &amp; Interest</b>	<b>Property Insurance</b>	<b>Property Taxes</b>	<b>Mortgage Insurance</b>	<b>Total Monthly Payment</b>	<b>Down-Payment</b>	<b>Affordable Home Price</b>
Acutely Low -Income (15% MFI)	\$251	\$206	\$9	\$36	\$0	\$251	\$7,907	\$39,534
Extremely Low -Income (30% MFI)	\$446	\$366	\$15	\$64	\$0	\$446	\$14,050	\$70,248
Very Low -Income (50% MFI)	\$744	\$611	\$25	\$107	\$0	\$744	\$23,437	\$117,184
Low -Income (80% MFI)	\$1,190	\$978	\$41	\$172	\$0	\$1,190	\$37,486	\$187,432
Moderate-Income (120% MFI)	\$2,011	\$1,652	\$69	\$290	\$0	\$2,011	\$63,349	\$316,744
Achievable (175% MFI)	\$2,933	\$2,409	\$100	\$423	\$0	\$2,933	\$92,393	\$461,964

<b>2-Person Household</b>	<b>Amount Avail. for Housing</b>	<b>Principal &amp; Interest</b>	<b>Property Insurance</b>	<b>Property Taxes</b>	<b>Mortgage Insurance</b>	<b>Total Monthly Payment</b>	<b>Down-Payment</b>	<b>Affordable Home Price</b>
Acutely Low -Income (15% MFI)	\$288	\$237	\$10	\$42	\$0	\$288	\$9,072	\$45,362
Extremely Low -Income (30% MFI)	\$510	\$419	\$17	\$74	\$0	\$510	\$16,066	\$80,328
Very Low -Income (50% MFI)	\$850	\$698	\$29	\$123	\$0	\$850	\$26,776	\$133,880
Low -Income (80% MFI)	\$1,360	\$1,117	\$46	\$196	\$0	\$1,360	\$42,842	\$214,208
Moderate-Income (120% MFI)	\$2,299	\$1,889	\$79	\$332	\$0	\$2,299	\$72,421	\$362,106
Achievable (175% MFI)	\$3,353	\$2,754	\$115	\$484	\$0	\$3,353	\$105,623	\$528,117

<b>3-Person Household</b>	<b>Amount Avail. for Housing</b>	<b>Principal &amp; Interest</b>	<b>Property Insurance</b>	<b>Property Taxes</b>	<b>Mortgage Insurance</b>	<b>Total Monthly Payment</b>	<b>Down-Payment</b>	<b>Affordable Home Price</b>
Acutely Low -Income (15% MFI)	\$323	\$265	\$11	\$47	\$0	\$323	\$10,175	\$50,874
Extremely Low -Income (30% MFI)	\$622	\$511	\$21	\$90	\$0	\$622	\$19,594	\$97,969
Very Low -Income (50% MFI)	\$956	\$785	\$33	\$138	\$0	\$956	\$30,115	\$150,576
Low -Income (80% MFI)	\$1,530	\$1,257	\$52	\$221	\$0	\$1,530	\$48,197	\$240,984
Moderate-Income (120% MFI)	\$2,586	\$2,124	\$88	\$373	\$0	\$2,586	\$81,462	\$407,310
Achievable (175% MFI)	\$3,771	\$3,098	\$129	\$544	\$0	\$3,771	\$118,791	\$593,954

Sources: HCD; California Department of Insurance, Homeowners Premium Survey; Mono County; BAE, 2023.

**Table 11: Affordable For-Sale Housing Prices, Mono County, 2023 (Page 2 of 2)**

<b>4-Person Household</b>	<b>Amount Avail. for Housing</b>	<b>Principal &amp; Interest</b>	<b>Property Insurance</b>	<b>Property Taxes</b>	<b>Mortgage Insurance</b>	<b>Total Monthly Payment</b>	<b>Down- Payment</b>	<b>Affordable Home Price</b>
Acutely Low -Income (15% MFI)	\$359	\$295	\$12	\$52	\$0	\$359	\$11,309	\$56,545
Extremely Low -Income (30% MFI)	\$750	\$616	\$26	\$108	\$0	\$750	\$23,626	\$118,129
Very Low -Income (50% MFI)	\$1,063	\$873	\$36	\$153	\$0	\$1,063	\$33,486	\$167,429
Low -Income (80% MFI)	\$1,700	\$1,396	\$58	\$245	\$0	\$1,700	\$53,552	\$267,760
Moderate-Income (120% MFI)	\$2,874	\$2,361	\$98	\$415	\$0	\$2,874	\$90,534	\$452,672
Achievable (175% MFI)	\$4,191	\$3,443	\$143	\$605	\$0	\$4,191	\$132,021	\$660,107

<b>5-Person Household</b>	<b>Amount Avail. for Housing</b>	<b>Principal &amp; Interest</b>	<b>Property Insurance</b>	<b>Property Taxes</b>	<b>Mortgage Insurance</b>	<b>Total Monthly Payment</b>	<b>Down- Payment</b>	<b>Affordable Home Price</b>
Acutely Low -Income (15% MFI)	\$388	\$319	\$13	\$56	\$0	\$388	\$12,222	\$61,112
Extremely Low -Income (30% MFI)	\$879	\$722	\$30	\$127	\$0	\$879	\$27,690	\$138,448
Very Low -Income (50% MFI)	\$1,148	\$943	\$39	\$166	\$0	\$1,148	\$36,163	\$180,817
Low -Income (80% MFI)	\$1,836	\$1,508	\$63	\$265	\$0	\$1,836	\$57,836	\$289,181
Moderate-Income (120% MFI)	\$3,104	\$2,550	\$106	\$448	\$0	\$3,104	\$97,780	\$488,898
Achievable (175% MFI)	\$4,526	\$3,718	\$155	\$653	\$0	\$4,526	\$142,574	\$712,871

<b>Ownership Cost Assumptions</b>	
% of Income for Housing Costs	30% of gross annual income
<b>Mortgage Terms</b>	
Down payment	20% of home value
Annual interest rate (b)	6.8% fixed
Loan term	30 years
Annual property tax rate (c)	1.10% of home value
Annual homeowners insurance (d)	0.26% of home value

Notes:

(a) Income limits are based on the CA Department of Housing and Community Development-adjusted median family income of \$95,800 (\$2023).

(b) Based on an average interest rate in November 2023.

(c) Based on the tax rate area 051-027.

(d) Based on an average of quoted insurance premiums from the Homeowners Premium Survey, published by the California Department of Insurance, for a new home in Mono County near Mammoth Lakes, valued at \$700,000 with a \$1,000 annual deductible.

Sources: HCD; California Department of Insurance, Homeowners Premium Survey; Mono County; BAE, 2023.

Homeowners' association (HOA) dues and special assessments are also an important factor in the relative affordability of multi-family condominium units. According to local property managers and HOA representatives, typical HOA dues can range from \$400 to \$650 per month. Also, as many of the condominium properties in Mono County are quite old, many condominium property owners are subject to additional special assessments that were imposed to help cover costs associated with significant repairs, such as roof replacements, that were not fully covered by the association's replacement reserve. HOA dues and special assessments can vary significantly between properties and by unit size, and also can change dramatically from year to year based on the property's needs. These charges can significantly impact the relative affordability of condominium units to workforce households.

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## RENTAL HOUSING PRICES

Based on outreach conducted with area property management companies, BAE identified 23 long-term rental listings in the unincorporated county. **Table 12** reports that on average private party rental rates ranged from \$1,000 to \$3,000 per month per unit, depending on unit size, with an average cost per bedroom of around \$1,000. The majority of the available listings (17 units) were located in June Lake, with five listings in Crowley and one in Mono City. BAE was unable to locate any long-term rental listings in Bridgeport, Lee Vining, or Walker/Coleville.

**Table 11. Long-Term Rental Listings, Unincorporated Mono County, December 2023**

<u>By Unit Size</u>	<u>Count</u>	<u>Average \$/Month</u>	
		<u>Per Unit</u>	<u>Per Bdrm</u>
Studio	3	\$1,075	\$1,075
One Bedroom	3	\$1,123	\$1,123
Two Bedroom	10	\$2,183	\$1,091
Three Bedroom	7	\$2,971	\$990
<b>All Units</b>	<b>23</b>	<b>\$2,188</b>	<b>\$1,062</b>

<u>By Community</u>	<u>Count</u>	<u>Average \$/Month</u>	
		<u>Per Unit</u>	<u>Per Bdrm</u>
Crowley	5	\$2,320	\$1,000
June Lake	17	\$2,128	\$1,096
Mono City	1	\$2,500	\$833
<b>All Units</b>	<b>23</b>	<b>\$2,188</b>	<b>\$1,062</b>

Sources: Local Area Property Managers; BAE, 2023.

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## AFFORDABLE RENTAL RATES

**Table 13**, on the following page, reports the rental rates that may reasonably be considered affordable at different income levels. Compared to the data provided in Table 12, the average long-term rental in unincorporated Mono County could be considered affordable to low- and moderate-income households depending on household size. Note, however, that while housing may be relatively affordable, this data does not speak to its relative availability.

**Table 12. Affordable Long-Term Rental Rates, Mono County, 2023**

<b>2023 Income Limits (a)</b>	<b>Persons Per Household</b>				
	<b>One</b>	<b>Two</b>	<b>Three</b>	<b>Four</b>	<b>Five</b>
Acutely Low -Income (15% MFI)	\$10,050	\$11,500	\$12,900	\$14,350	\$15,500
Extremely Low -Income (30% MFI)	\$17,850	\$20,400	\$24,860	\$30,000	\$35,140
Very Low -Income (50% MFI)	\$29,750	\$34,000	\$38,250	\$42,500	\$45,900
Low -Income (80% MFI)	\$47,600	\$54,400	\$61,200	\$68,000	\$73,450
<b>Median Income (100% MFI)</b>	<b>\$67,050</b>	<b>\$76,650</b>	<b>\$86,200</b>	<b>\$95,800</b>	<b>\$103,450</b>
Moderate-Income (120% MFI)	\$80,450	\$91,950	\$103,450	\$114,950	\$124,150

<b>Affordable Rents (b)</b>	<b>Unit Size</b>				
	<b>Studio</b>	<b>1-Bedroom</b>	<b>2-Bedroom</b>	<b>3-Bedroom</b>	<b>4-Bedroom</b>
<b>Acutely Low Income</b>					
1-Person	\$110	\$87			
2-Person		\$124	\$77		
3-Person			\$112	\$67	
4-Person			\$148	\$103	\$52
5-Person				\$132	\$81
<b>Extremely Low Income</b>					
1-Person	\$305	\$282			
2-Person		\$346	\$299		
3-Person			\$411	\$366	
4-Person			\$539	\$494	\$443
5-Person				\$623	\$572
<b>Very Low Income</b>					
1-Person	\$603	\$580			
2-Person		\$686	\$639		
3-Person			\$745	\$700	
4-Person			\$852	\$807	\$756
5-Person				\$892	\$841
<b>Low</b>					
1-Person	\$1,049	\$1,026			
2-Person		\$1,196	\$1,149		
3-Person			\$1,319	\$1,274	
4-Person			\$1,489	\$1,444	\$1,393
5-Person				\$1,580	\$1,529
<b>Moderate</b>					
1-Person	\$1,870	\$1,847			
2-Person		\$2,135	\$2,088		
3-Person			\$2,375	\$2,330	
4-Person			\$2,663	\$2,618	\$2,567
5-Person				\$2,848	\$2,797

Notes:

(a) Income limits are based on the CA Department of Housing and Community Development-adjusted median family income of \$95,800 (\$2023).

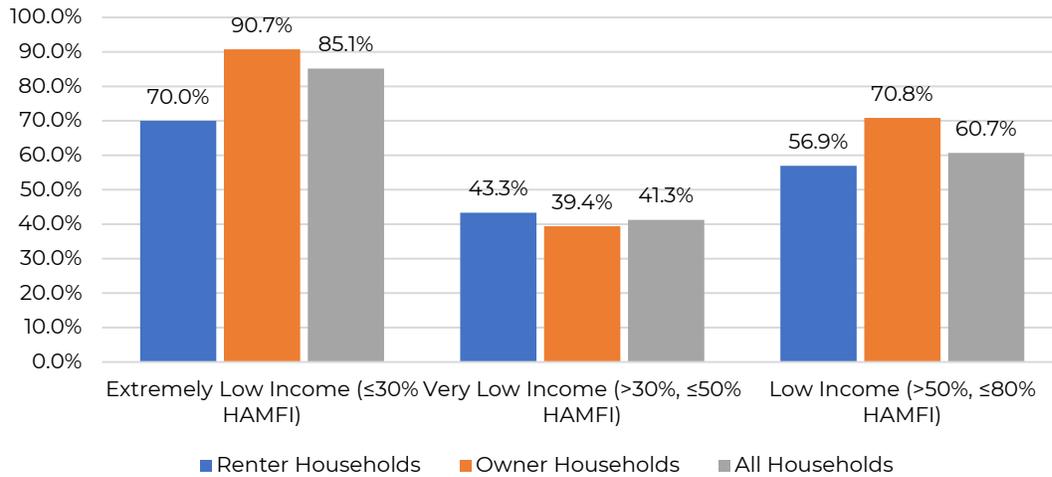
(b) Affordable rents equal to 30 percent of gross monthly income, minus a utility allowance. The utility allowance is published by Stanislaus Regional Housing Authority (as referred to by Eastern Sierra Community Housing) in 2023. Utility allowances assume that all heating, cooking, and water heating would be done using natural gas. Other electricity usage is also included, accounting for lighting, refrigeration, and small appliances.

Sources: CA Department of Housing and Community Development; Eastern Sierra Community Housing and Stanislaus Regional Housing Authority; BAE, 2023.

## HUD DEFINED HOUSING PROBLEMS

Although long-term rental rates appear to be relatively affordable at lower- and moderate-income levels, data published by the U.S. Department of Housing and Urban Development (HUD) indicate that one-third of all households in Mono County experienced at least one of the four HUD defined housing problems between 2016 and 2020. HUD defined housing problems include overpayment, overcrowding, and/or inadequate kitchen or bathroom facilities. Given the community's reliance on service sector employment, overpayment represents the most common of the four HUD defined housing problems. While the prevalence of housing problems typically shows an inverse relationship to income, the data indicate that very low-income households have a reduced prevalence of housing problems compared to extremely low- and low-income households, though the prevalence is still greater than in the broader population when including higher income households. The presence of income restricted housing projects in Mammoth Lakes, which is captured in the countywide data, may account for this relationship.

**Figure 6: Housing Problems by Income and Tenure, Mono County, 2016-2020**



**Notes:**

(a) CHAS data reflect HUD-defined household income limits. HAMFI stands for HUD Area Median Family Income. Sources: U.S. Department of Housing and Urban Development, 2016-2020 Comprehensive Housing Affordability Strategy (CHAS) data; BAE, 2023.

**Table 13. Housing Problems by Income and Tenure, Mono County, 2016-2020**

Household Income Brackets (a)	Renter Households		Owner Households		All Households	
	Number	Percent	Number	Percent	Number	Percent
<b>Household Income ≤30% HAMFI (b)</b>	<b>100</b>	<b>100.0%</b>	<b>310</b>	<b>100.0%</b>	<b>410</b>	<b>100.0%</b>
1 or more of 4 Housing Problem	70	70.0%	245	90.7%	315	85.1%
1 or more of 4 Severe Housing Problems (d)	70	70.0%	245	90.7%	315	85.1%
No Housing Problems	30	30.0%	25	9.3%	55	14.9%
<b>Household Income &gt;30% to ≤50% HAMFI (b)</b>	<b>150</b>	<b>100.0%</b>	<b>165</b>	<b>100.0%</b>	<b>315</b>	<b>100.0%</b>
1 or more of 4 Housing Problems (c)	65	43.3%	65	39.4%	130	41.3%
1 or more of 4 Severe Housing Problems (d)	40	26.7%	40	24.2%	80	25.4%
Has none of 4 Housing Problems	85	56.7%	100	60.6%	185	58.7%
<b>Household Income &gt;50% to ≤80% HAMFI (b)</b>	<b>325</b>	<b>100.0%</b>	<b>120</b>	<b>100.0%</b>	<b>445</b>	<b>100.0%</b>
1 or more of 4 Housing Problems (c)	185	56.9%	85	70.8%	270	60.7%
1 or more of 4 Severe Housing Problems (d)	55	16.9%	45	37.5%	100	22.5%
Has none of 4 Housing Problems	140	43.1%	35	29.2%	175	39.3%
<b>Household Income &gt;80% to ≤100% HAMFI (b)</b>	<b>335</b>	<b>100.0%</b>	<b>735</b>	<b>100.0%</b>	<b>1,070</b>	<b>100.0%</b>
1 or more of 4 Housing Problems (c)	145	43.3%	355	48.3%	500	46.7%
1 or more of 4 Severe Housing Problems (d)	0	0.0%	315	42.9%	315	29.4%
Has none of 4 Housing Problems	190	56.7%	380	51.7%	570	53.3%
<b>Household Income &gt;100% HAMFI (b)</b>	<b>750</b>	<b>100.0%</b>	<b>2,210</b>	<b>100.0%</b>	<b>2,960</b>	<b>100.0%</b>
1 or more of 4 Housing Problems (c)	115	15.3%	660	29.9%	775	26.2%
1 or more of 4 Severe Housing Problems (d)	0	0.0%	45	2.0%	45	1.5%
Has none of 4 Housing Problems	635	84.7%	1,550	70.1%	2,185	73.8%
<b>Total Households (b)</b>	<b>1,660</b>	<b>100.0%</b>	<b>3,535</b>	<b>100.0%</b>	<b>5,195</b>	<b>100.0%</b>
1 or more of 4 Housing Problems (c)	580	34.9%	1,445	40.9%	2,025	39.0%
1 or more of 4 Severe Housing Problems (d)	165	9.9%	2,850	80.6%	3,015	58.0%
Has none of 4 Housing Problems	1,080	65.1%	2,090	59.1%	3,170	61.0%

Notes:

(a) CHAS data reflect HUD-defined household income limits. HAMFI stands for HUD Area Median Family Income.

(b) Totals do not equal the sum of individual figures due to independent rounding.

(c) Housing problems include lack of kitchen or plumbing, more than 1 person per room, or cost burden greater than 30%.

(d) Housing problems include lack of kitchen or plumbing, more than 1 person per room, or cost burden greater than 50%.

Sources: U.S. Department of Housing and Urban Development, 2016-2020 Comprehensive Housing Affordability Strategy (CHAS) data; BAE, 2023.

## NEAR-TERM MIGRATION TRENDS

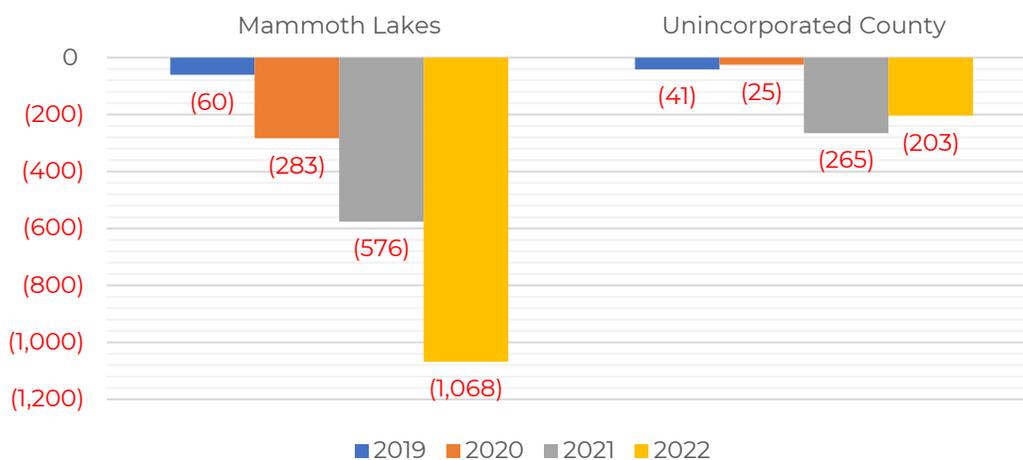
The following section summarizes the available information regarding population and household migration trends, with a focus on the period from 2019 and 2022.

### HOUSEHOLD RELOCATION TRENDS

To provide a more thorough evaluation of recent in- and out-migration patterns in Mono County, BAE collected publicly available data published by the U.S. Postal Service (USPS) regarding change of address requests by ZIP Code. BAE then sorted the data to highlight records for individuals, households, and businesses that filed change of address requests for moves either into, or out of, area ZIP Codes associated with unincorporated Mono County between 2019 and 2022. The data include breakouts for temporary and permanent change of address requests filed by businesses, households, and individuals.

Recognizing the purpose of this analysis, which is to assess pandemic induced population and household change, BAE made the assumption that business change of address requests are most likely associated with permanent moves. Therefore, BAE then subtracted the reported number of business change of address requests from the total number of permanent change of address requests to estimate the total number of permanent residential change of address requests. BAE then subtracted the total number of residential requests for those moving out of the study area ZIP Codes from those moving in to estimate the net change.

**Figure 7: U.S. Postal Service Change of Address Requests for ZIP Codes 93514, 93517, 93529, and 96107**

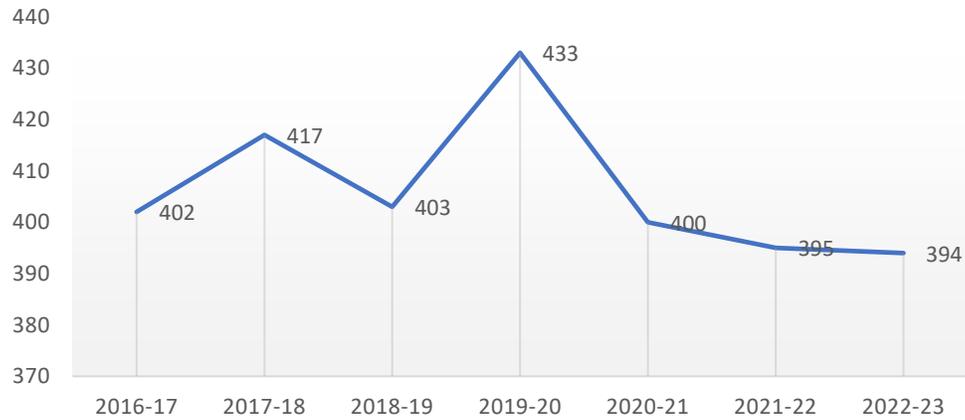


Sources: U.S. Postal Service, National Change of Address; BAE, 2023.

As illustrated in **Figure 7**, unincorporated Mono County experienced a modest outflow of 41 permanent relocations in 2019 and 25 relocations in 2020, which increased to 265 permanent relocations in 2021 and 203 in 2022. While not conclusive, these data support anecdotal evidence of significant outmigration among permanent residents, potentially resulting from decreased housing affordability and availability, among other factors. Similar trends are illustrated in Mammoth Lakes, which experienced increasing permanent outmigration from 2019 through 2022.

## COUNTYWIDE SCHOOL ENROLLMENT

**Figure 8: K-12 School Enrollment, Eastern Sierra Unified School District, 2016-17 to 2022-23**



Sources: California Department of Education, DataQuest, Enrollment Multi-Year Summary by Grade; BAE, 2023.

Data collected from the California Department of Education (CDE) indicates that enrollment in the Eastern Sierra Unified School District has largely remained in the low-400s over the last seven academic years. The 2019-2020 academic year featured a notable increase in enrollment from 403 students in the prior year to 433 students in 2019-2020. In 2020-2021, however, enrollment dropped back down to 400 and has continued to decrease slightly to 394 in the 2022-2023 academic year. Where data for the Mammoth Unified School District illustrate an abrupt decrease in enrollment that corresponds with onset of the pandemic, data for the Eastern Sierra Unified School District generally show volatility from year to year, likely due to the relatively low total enrollment numbers, and a very modest near-term drop in enrollment that may or may not have roots in pandemic induced migration trends.

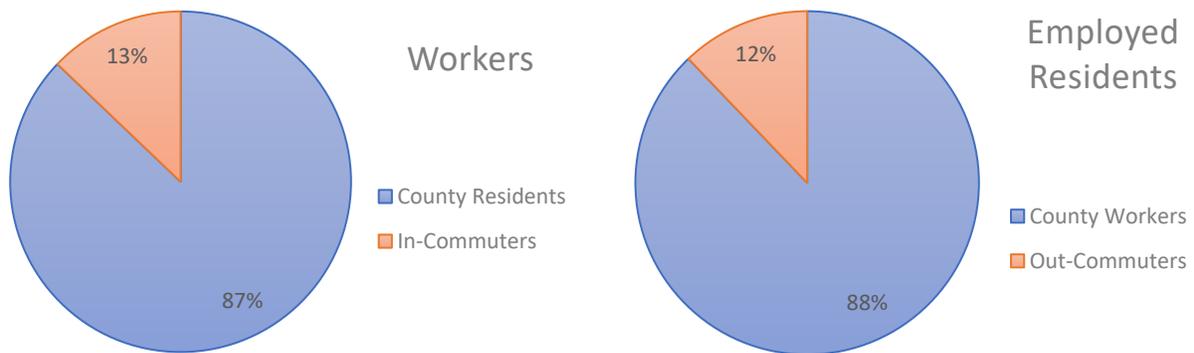
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## LABOR FORCE TRENDS

### IN- AND OUT-COMMUTING

Due to its comparatively remote location, communities in Mono County must predominantly rely on the resident labor force to meet workforce needs, versus relying on workers commuting into the community from outside. Data from the 2020 five-year American Community Survey (ACS), the most recent data available, indicate that there were 8,162 persons on average employed in Mono County, with 87 percent also living within the county, and only 13 percent commuting into the county from outside (**Figure 9**). In-commuters primarily originate from the neighboring communities of Inyo County in California and Douglas County in Nevada. By comparison, the County had an average of 8,095 employed residents, again with around 88 percent working within the community and 12 percent commuting out.

**Figure 9: In- and Out-Commuter Rates, Mono County, 2016-2020 ACS**



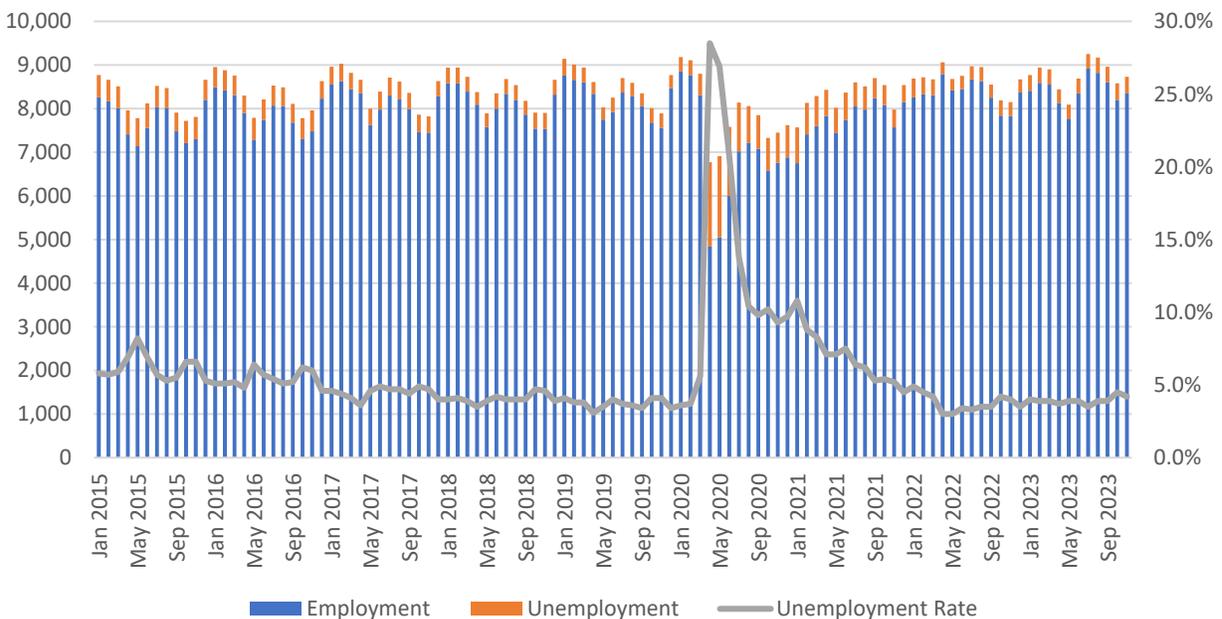
Sources: U.S. Census Bureau, 2016-2020 American Community Survey (ACS); BAE, 2023.

## LABOR FORCE AVAILABILITY

Due to its remote location and increasing cost of living, both the Town of Mammoth Lakes and Mono County have experienced significant declines in labor force availability in recent years.

**Figure 10** illustrates monthly employment and unemployment trends, including the unemployment rate, in Mono County from January 2015 through October 2023. The data indicate that total labor force availability remained relatively stable at around 8,000 workers between 2015 and 2019. Unemployment over this period fluctuated seasonally between three and five percent. Corresponding with the Governor's pandemic-era public health orders issued in early 2020, the number of employed Mono County residents dropped from 8,310 in March 2020 to 4,840 in April, increasing the unemployment rate to a high of 28.5 percent. Though resident employment recovered fairly quickly to 7,020 employed residents in July, the unemployment rate remained between eight and ten percent until March of 2021. Since mid-2021, unemployment has dropped and remained between three and four percent (i.e., 300-400 unemployed persons) for most of 2022 and 2023, which is largely consistent with historical pre-pandemic trends.

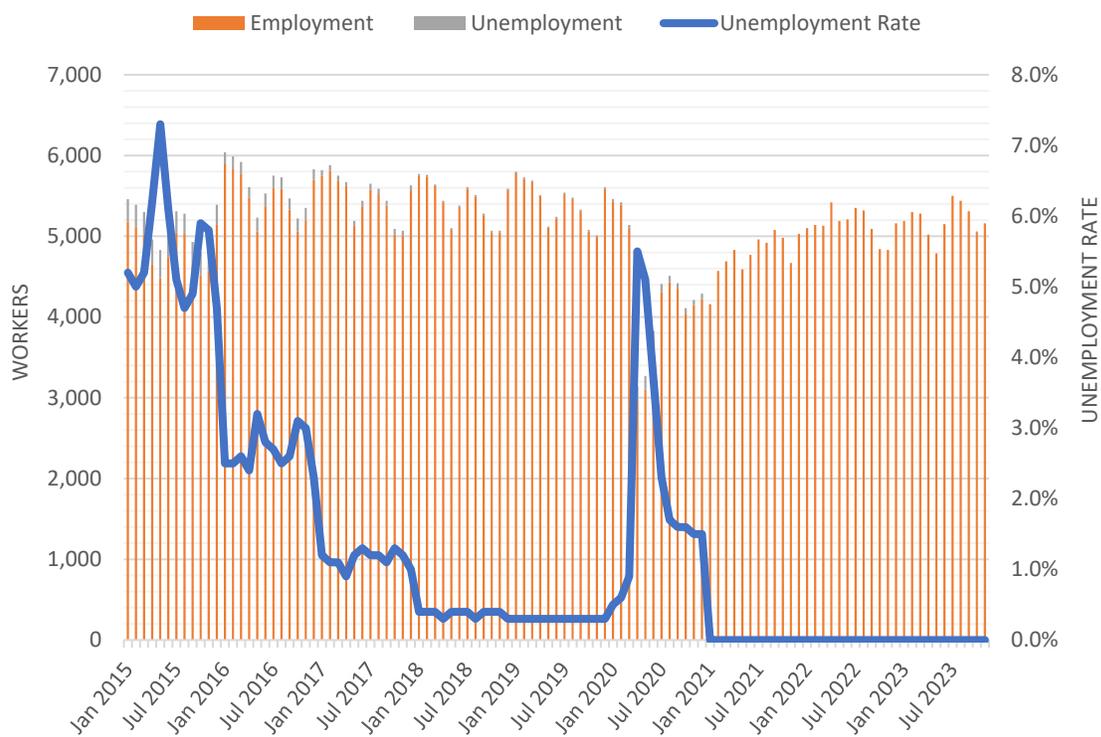
**Figure 10: Employment and Unemployment Trends, Mono County, Jan 2015 through Oct 2023**



Sources: California Employment Development Department (EDD); BAE, 2023.

Unemployment trends within the Town of Mammoth Lakes, however, are notably different. **Figure 11** illustrates similar data for the Town and shows that while the total labor force in the Town remained relatively stable pre-pandemic, unemployment generally trended downwards, reaching a stabilized value of around 0.5 percent in 2018 and 2019. Though the onset of the pandemic induced a short-term spike in the unemployment rate, the EDD reports that the unemployment rate has essentially fallen to zero as of January 2021. If this data is correct, the contraction of the labor force and the decline in the unemployment rate in the Town of Mammoth Lakes implies that businesses in the Town are likely being put in the position of needing to scale back operations due to inadequate labor availability or to increasingly rely on alternative labor force pools (e.g., seasonal and international workers, as well as workers housed within the unincorporated area).

**Figure 11: Employment and Unemployment Trends, Town of Mammoth Lakes, Jan 2015 through Oct 2023**



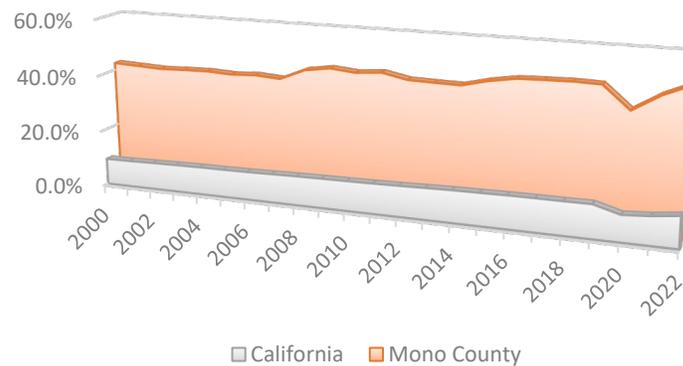
Sources: California Employment Development Department (EDD); BAE, 2023.

## TOURISM ACCOMMODATION INDUSTRY TRENDS

Tourism is an integral part of the Mono County economy.

The following section summarizes trends in the overnight accommodations industry in Mono County. Where reasonably possible, the data is broken out by County subarea.

**Figure 12: Leisure and Hospitality Jobs as a Share of Total Nonfarm Employment, 2000-2022**



Data from the California Employment Development Department (EDD) indicates that the Leisure and Hospitality sector – which includes recreation, accommodations, and food service, among other activities – represents Mono County’s single largest employment sector, accounting for nearly half of all jobs. It also represents the only significant growth industry within the county and accounts for an increasing share of countywide employment, as shown in **Figure 12**. Additional data from the Bureau of Economic Analysis indicates that the sector also represents nearly one quarter of countywide gross domestic product, a share that has increased in recent decades.

Additional data from Dean Runyan and Associates, which estimates the economic impacts of travel by county for Visit California, indicates that visitors spent \$580.6 million in Mono County in 2022, which supported more than 6,000 jobs directly and indirectly throughout the county.<sup>7</sup> Tourism spending also generated approximately \$44.2 million in local tax receipts.

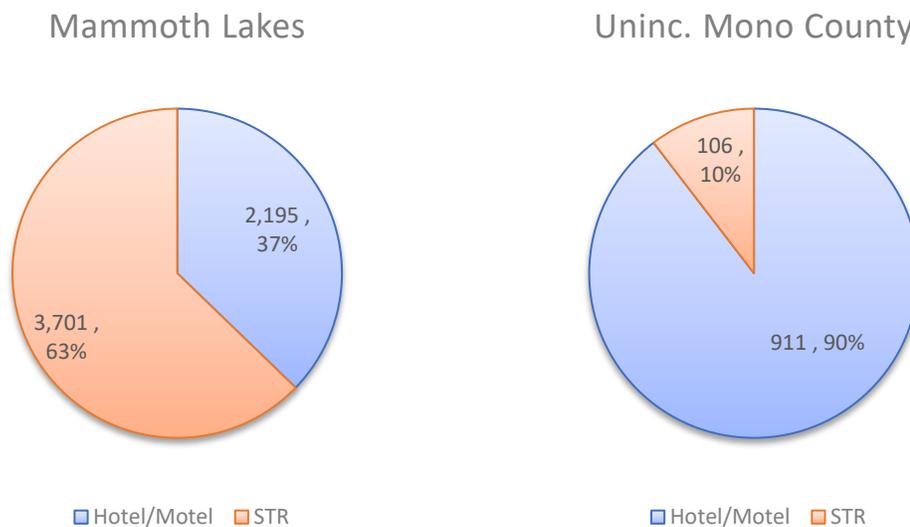
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<sup>7</sup> Direct impacts represent the immediate effects of visitor spending, such as jobs supported at the location where the spending occurred (e.g., restaurants, hotels, etc.). Indirect impacts represent the multiplier effect, where dollars spent at the point of sale are then re-spent on the goods and services needed to operate the point-of-sale business (e.g., restaurant produce, retail products, utilities, etc.).

## TOURIST ACCOMMODATIONS INVENTORY

Due to its remote location, Mono County relies heavily on overnight tourist visitation to support visitor spending and associated economic activity and tax collections. The inventory of tourist accommodations is diversified with various accommodation types (e.g., hotel/motel, tourist cabins, STR, etc.) across a variety of quality levels (e.g., luxury, upscale, midmarket, economy). **Figure 13** illustrates that while the tourist accommodations inventory in the Town of Mammoth Lakes is heavily skewed towards STRs, traditional hotel and motel accommodations make up the majority of the available tourist accommodations inventory in the unincorporated County.

**Figure 13: Tourist Accommodation Units by Type, Town of Mammoth Lakes and Unincorporated Mono County, December 2023**



Sources: Mono County, TOT Certificate and Business License Database; BAE, 2023.

Further analysis of the estimates reported in Figure 13 also indicate that the tourist accommodations inventory in the unincorporated County represents around 14.7 percent of the countywide total. STRs located in the unincorporated county represent around 2.9 percent of the countywide inventory, while the unincorporated area's hotels and motels account for around 41.5 percent of the countywide hotel and motel inventory.

## HOTEL/MOTEL INVENTORY

According to Mono County business license and transient occupancy tax (TOT) certificates data, there are around 50 hotel, motel, bed and breakfast, and tourist cabin establishments located throughout unincorporated Mono County. As summarized in **Table 15**, the County estimates that these properties contain more than 900 hotel/motel rooms and tourist units (e.g., cabins, etc.). The County does not currently have any dedicated hotel projects proposed for development, although a 120-room hotel development in Lee Vining has been approved but not yet constructed. A full inventory of hotel/motel properties is provided in **Appendix B**.

**Table 14. Hotel/Motel Properties and Number of Rooms/Units, Unincorporated Mono County, December 2023**

Community	Hotel/Motel		Hotels as a share of All Tourist Accommodations (b)
	Properties	Rooms/Units (a)	
Benton	1	11	92%
Bridgeport	14	262	98%
Coleville	5	61	98%
Crowley Lake	5	64	97%
Hilton Creek	0	0	0%
June Lake	14	321	78%
Lee Vining	8	154	99%
Mammoth Lakes (Outside Town)	2	38	95%
Topaz	0	0	0%
<b>All, Uninc. County</b>	<b>49</b>	<b>911</b>	<b>90%</b>

Notes:

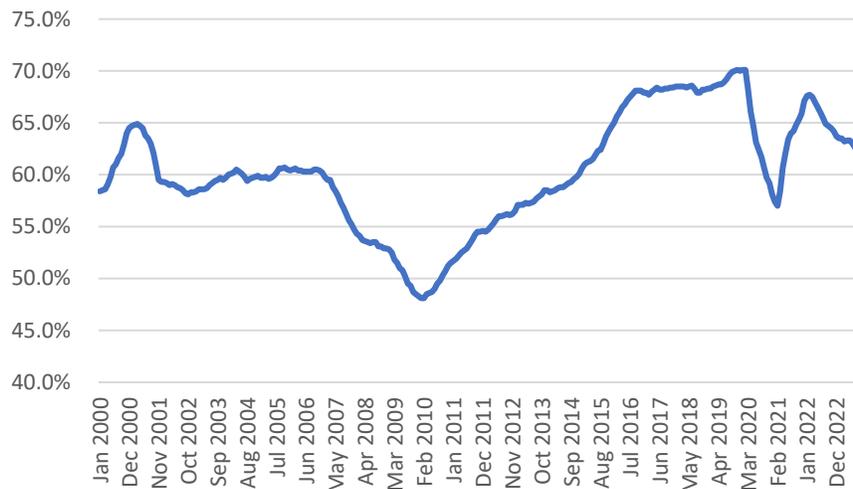
(a) Includes traditional hotel and motel rooms, as well as tourist cabins and other forms of accommodation.

(b) Based on a comparison between the number of hotel/motel rooms/units and the full inventory of tourist accommodations, including both STRs and hotel/motel properties.

Sources: Mono County, TOT Certificate and Business License Database; BAE, 2023.

## HOTEL OCCUPANCY RATES

**Figure 14. 12-Month Average Hotel Occupancy Rate, Unincorporated Mono County, Jan 2000 to Oct 2023**



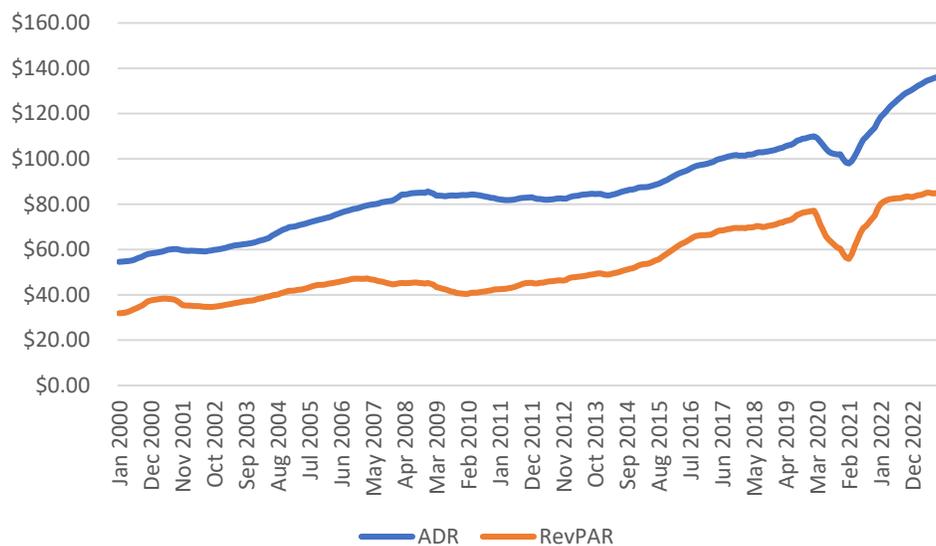
Sources: CoStar; BAE, 2023.

Data on hotel occupancy and rates are not available as part of the County's business license database. **Figure 14** reports data from CoStar, a private data vendor. Most hotel operators target an average occupancy rate of 60 to 70 percent in order to sustain operations. Figure 14 illustrates the 12-month running average occupancy rate for hotels in unincorporated Mono County. The data show significant drops in occupancy in the late 2000's, corresponding to the Great Recession, as well as in 2020-2021 corresponding with the global pandemic. As of 2022, occupancy rates recovered to an average of around 62 percent, which remains below the high of 70 percent in late 2019.

### HOTEL NIGHTLY RATES

Hotel rates are typically tracked based on the average daily rate (ADR) as well as the average revenue per available room night (RevPAR). **Figure 15** illustrates change in the ADR and RevPAR for hotel properties in the Town of Mammoth Lakes. The data indicate that, on average, both ADR and RevPAR have increased steadily over time. The exceptions include a notable slump extending from the late 2000s to mid-2010s, and an abrupt decrease as a result of the Coronavirus pandemic between 2020 and 2021, with rates resuming their prior trajectory as of 2022. CoStar estimates the ADR for the 12-months from November 2022 to October 2023 at \$136.19 for properties located in unincorporated Mono County. RevPAR for the same period averaged \$84.55.

**Figure 15. 12-Month Average Hotel ADR and RevPAR, Unincorporated Mono County, Jan 2000-Oct 2023**



Sources: CoStar; BAE, 2023.

## SHORT-TERM RENTAL INVENTORY

According to Mono County business license and TOT certificates data, there are 106 permitted STRs located throughout unincorporated Mono County. As summarized in **Table 16**, the vast majority (85 percent) of STR units with County TOT certificates are located in June Lake, with five located in or around Bridgeport and one or two located in various other locations throughout the remainder of the unincorporated county. Table 15 reports alternative data from AirDNA, a private data vendor that uses “web scraping” methods to collect data on STR listings posted to the major online platforms, like AirBNB and VRBO. According to this data, there were 165 STR listings on the market in unincorporated Mono County as of December 2023. Note, however, that these data do not distinguish between units that fit the County definition of an STR, versus those that do not. For example, the listings may include some cabin rentals that are located on larger campground properties and units listed within multi-family condominium developments. Therefore, it is not possible to determine if the additional rentals are legal or illegal rentals under existing County regulations.

**Table 15. Permitted Short-Term Rentals with Transient Occupancy Tax (TOT) Certificates, Unincorporated Mono County, December 2023**

<b>Community</b>	<b>Permitted STR Units (a)</b>	<b>STRs as a Share of All Tourist Accommodations (b)</b>	<b>STRs as a Share of the Housing Stock (c)</b>
Benton	1	8.3%	0.6%
Bridgeport	5	1.9%	1.4%
Coleville	1	1.6%	0.5%
Crowley Lake	2	3.0%	0.4%
Hilton Creek	1	100.0%	n.a.
June Lake	90	21.9%	11.0%
Lee Vining	2	1.3%	1.8%
Mammoth Lakes (Outside Town)	2	5.0%	n.a.
Topaz	2	100%	4.8%
<b>All, Uninc. County</b>	<b>106</b>	<b>10.4%</b>	<b>4.2%</b>

Notes:

(a) These figures represent TOT certificates, most of which reflect just one unit per records.

(b) Based on a comparison between the number of hotel/motel rooms/units and the full inventory of tourist accommodations, including both STRs and hotel/motel properties.

(c) Based on a comparison with the total number of housing units reported by the 2020 Decennial Census by Census Designated Place and for unincorporated Mono County.

Sources: Mono County, TOT Certificate and Business License Database; BAE, 2023.

**Table 16. Online Short-Term Rental Listings from AirDNA, Unincorporated Mono County, December 2023**

<b>Subarea (a)</b>	<b>Available Listings</b>
Benton Area	1
Bridgeport Area	12
Coleville-Walker Area	12
June Lake Area	135
Lee Vining Area	2
Topaz Area	3
<b>Total, All</b>	<b>165</b>
<b>Other Areas</b>	
Bishop Area (Inyo Cnty) (b)	69
Mammoth Lakes Area (c)	3,388

Notes:

(a) Subarea definitions, as defined by AirDNA, differ significantly from the County Planning Area definitions.

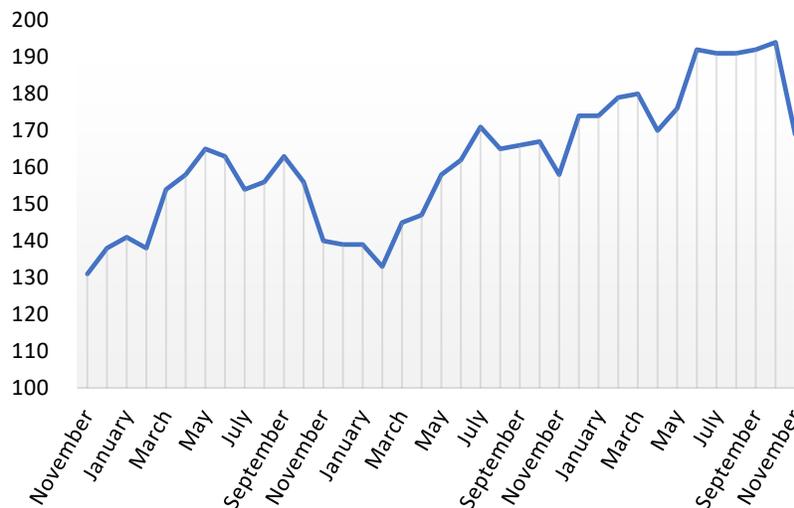
(b) The Bishop subarea includes portions of portions of southern Mono County, such as the Hammil Valley, Chalfant Valley, and Oasis Planning Areas, as well as the northern portion of Inyo County that includes the City of Bishop.

(c) The Mammoth Lakes subarea includes the Town of Mammoth Lakes as well as the surrounding unincorporated area.

Sources: AirDNA; BAE, 2023.

According to data from AirDNA, the unincorporated County saw an increase in online STR listings from 131 in November 2020 to a high of 194 in October 2023, which represents an increase of 63 listings or 48 percent, though the November 2020 listings total may have been suppressed as a result of the pandemic. Due to data limitations, it is not possible to evaluate inventory trends for a longer period using either AirDNA or County TOT certifications data.

**Figure 16. Average Number of Online Listings, Unincorporated Mono County, Nov 2020 to Nov 2023**



Note: Excludes the Mammoth Lakes and Bishop areas.

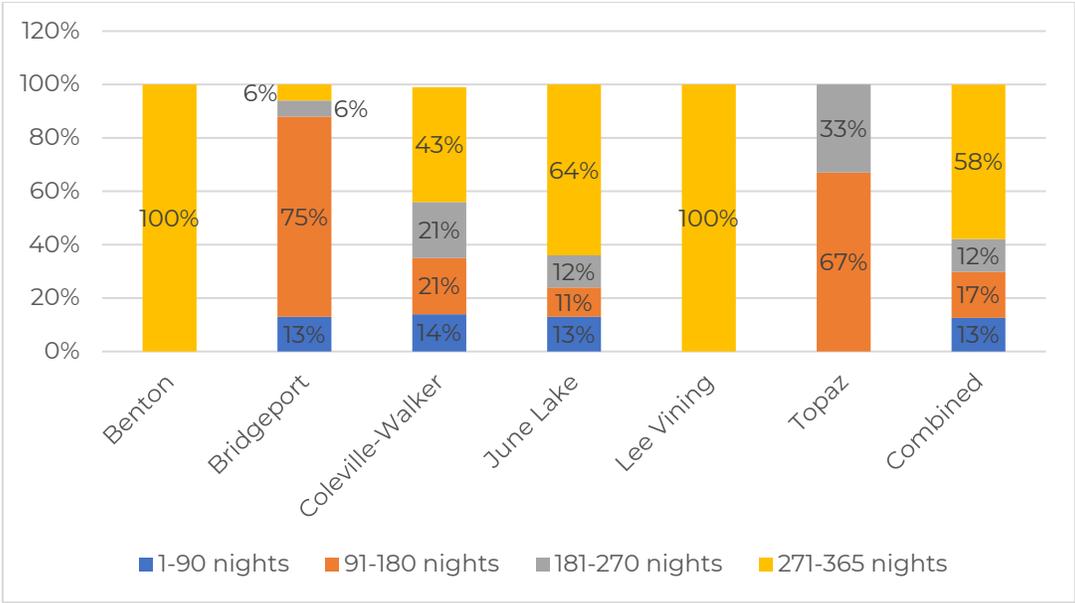
Sources: AirBNB; BAE, 2023.

**Figure 16** illustrates change in the number of online listings tracked by AirDNA, which include properties listed on AirBNB and VRBO throughout unincorporated Mono County, excluding the Mammoth Lakes area and part of Southern Mono County, which is grouped as part of the Bishop market. There is notable variation in the number of listings that are on the market at any given point in time. The data illustrate that in 2021, the unincorporated county experienced notable seasonal fluctuation in the number of online listings from a low of 138 to a high of 165. Calendar year 2022 saw a steadier fall season with the number of listings remaining relatively elevated through winter and into the spring of 2023. However, as of September 2023, the County saw a larger seasonal decline compared to 2022. Nonetheless, the number of online STR listings generally trended upwards over the last few years.

*AVAILABILITY AND OCCUPANCY*

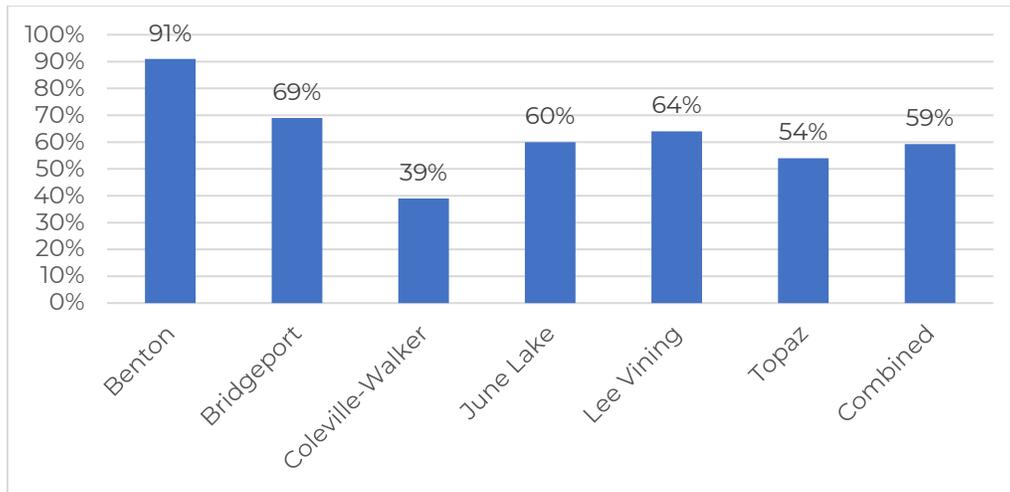
**Figure 17** illustrates the relative availability of online listings for occupancy over the last 12-months ending in November 2023, as reported by AirDNA. This data indicates a majority of listings in Benton, Coleville-Walker, June Lake, and Lee Vining are essentially available for occupancy year-round, meaning that these units can function as full-time tourist accommodations. Meanwhile, in Bridgeport and Topaz, the units that are being listed online are available for occupancy only during part of the year. One possible influencing factor is that many of the listings identified in the Bridgeport area, for example, are associated with areas that are only seasonally accessible due to weather, like the Virginia and Twin Lakes areas. Weather can also impact road conditions and the relative accessibility of many areas throughout Mono County, though only some areas are subject to seasonal road closures.

**Figure 17. Annual Availability, Unincorporated Mono County, December 2022 – November 2023**



Note: Excludes the Mammoth Lakes and Bishop areas.  
Sources: AirBNB; BAE, 2023.

**Figure 18. Average Occupancy Rate, Unincorporated Area, November 2023**



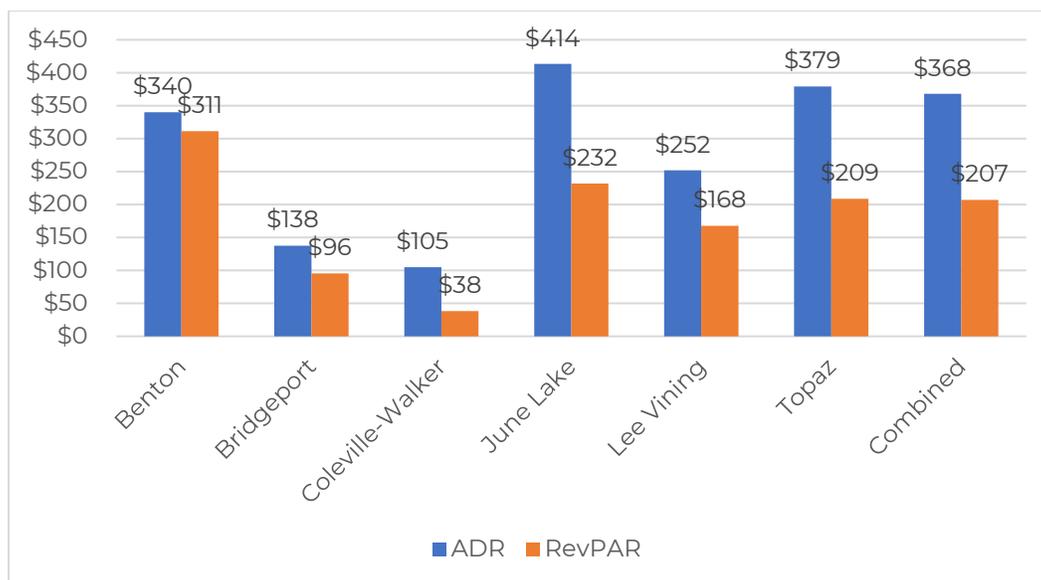
Note: Excludes the Mammoth Lakes and Bishop areas.

**Figure 18** illustrates average occupancy rates for online listings in unincorporated Mono County. According to this data, occupancy rates range from as little as 39 percent in the Coleville-Walker area to a high of 91 percent in Benton, though both of these areas feature only a handful of listings. In June Lake, which accounts for the majority of listings, the average occupancy rate is 60 percent.

### REVENUE GENERATION

**Figure 19** illustrates the average daily rates (ADR) and revenue per available room night (RevPAR) for online listings in unincorporated Mono County. According to this data, the ADR in June Lake is \$414 per night. Rates in Bridgeport and the Coleville-Walker area are notably lower at \$105-\$138 per night. Rates in Lee Vining are in the middle at \$252 per night.

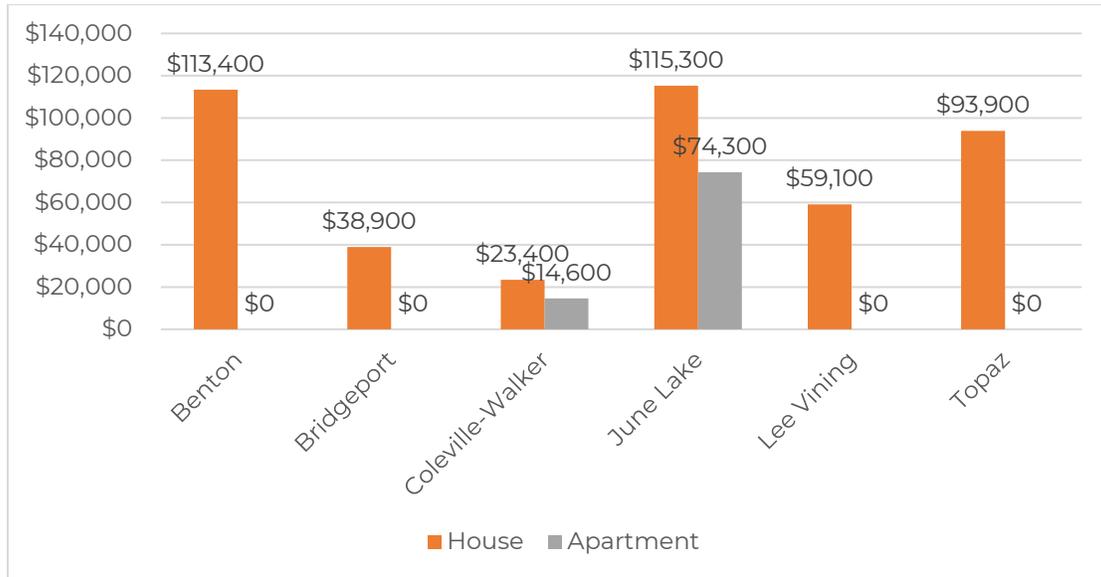
**Figure 19. Average STR ADR and RevPAR, Unincorporated Mono County, November 2023**



Note: Excludes the Mammoth Lakes and Bishop areas.

Sources: AirBNB; BAE, 2023.

**Figure 20. Gross Annual Revenue, Unincorporated Mono County, December 2022 – November 2023**



Note: Excludes the Mammoth Lakes and Bishop areas. Sources: AirBNB: BAE, 2023.

**Figure 20** illustrates the average gross revenue associated with online rental listings, as reported by AirDNA. Note that these figures do not account for the costs associated with operating an online overnight tourist rental unit, such as listing fees, cleaning, and repairs. Prior research indicates that operating expenses can vary widely between operators and very little data exists to estimate a representative operating expense ratio for property owners and managers in unincorporated Mono County. Nonetheless, the data indicate that more or less full-time rental listings in desirable locations, like June Lake, can generate significant revenue. For example, the average online listing in the June Lake area grosses more than \$115,000 per year for single-family homes and \$74,000 for multi-family units.

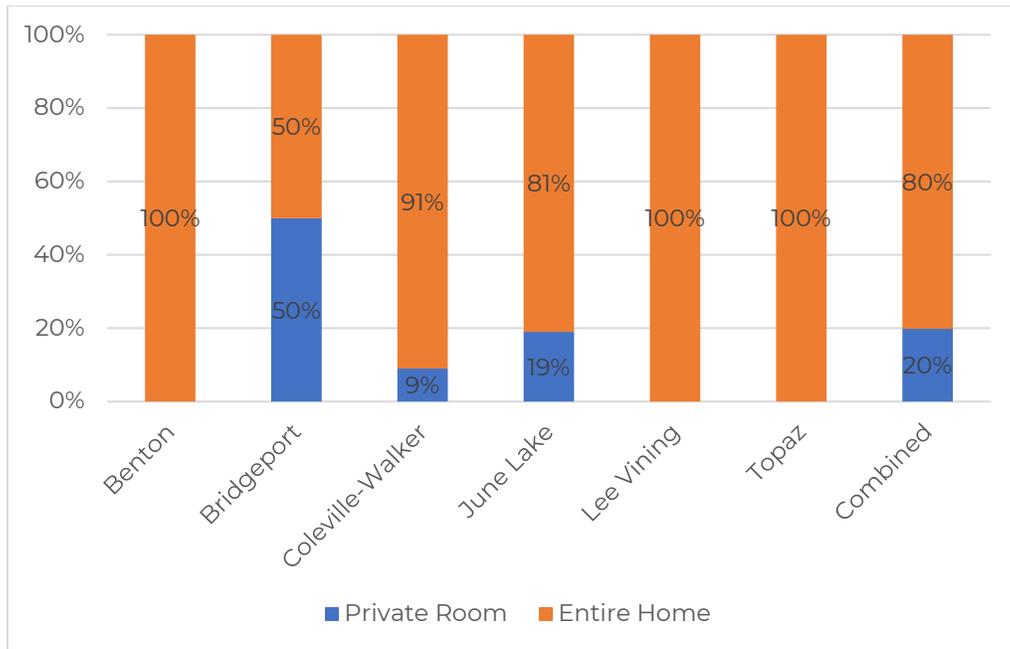
*LISTING TYPE*

**Figure 21**, below, illustrates the distribution of online rental listings by type of rental. This data indicates that while the majority of listings in unincorporated Mono County are for the entire housing unit, roughly half of the rentals in Bridgeport and almost 20 percent in June Lake are listings for private rooms.<sup>8</sup> The Coleville-Walker area also shows that almost 10 percent of listings are for private rooms.

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<sup>8</sup> As noted in the Literature Review, online listings may not be equivalent to STR definitions. E.g. Listings for private rooms may be located within a hotel or lodge complex rather than a single-family home.

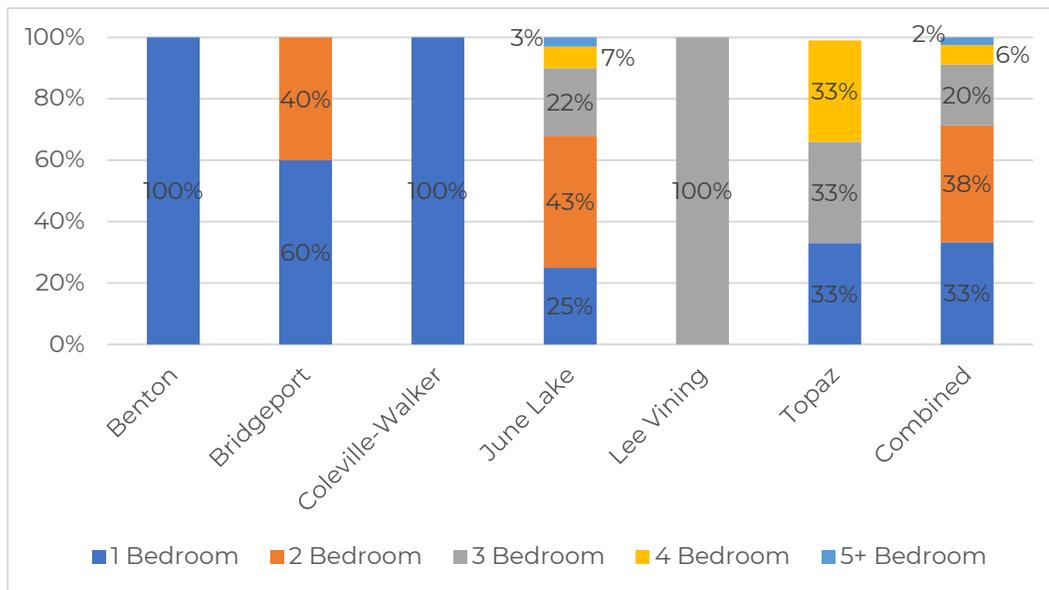
**Figure 21. Listing Type, November 2023**



Note: Excludes the Mammoth Lakes and Bishop areas.  
Sources: AirBNB: BAE, 2023.

*RENTAL UNIT SIZE*

**Figure 22. Online Rental Unit Size, November 2023**



Note: Excludes the Mammoth Lakes and Bishop areas.  
Sources: AirBNB: BAE, 2023.

**Figure 22** illustrates the distribution of online listings based on the size of the rental unit. The data indicate that more than 90 percent of units listed online for short-term rental had three or fewer bedrooms, meaning that the units would also likely be suitable for full-time occupancy by area workforce households. Only two areas had listings with four or more bedrooms. In June Lake, which had 135 total online listings, ten percent had four or more bedrooms. Topaz, which only had three listings, had one listing that was a four-bedroom single-family home.

## INDUCED WORKFORCE HOUSING DEMAND

The following section estimates demand for workforce housing created as a result of STR occupancy and associated visitor spending. Data for this analysis were primarily collected from the 2022 *The Economic Impact of Travel: California* report prepared by Dean Runyan and Associates on behalf of Visit California.<sup>9</sup> Additional data regarding average occupancy for STRs located in unincorporated Mono County were collected from AirDNA.

According to Dean Runyan, out-of-town visitors to Mono County spent approximately \$580.6 million within the county in 2022. This spending supported an estimated 5,990 jobs, including direct, indirect, and induced employment.<sup>10</sup> This equals an average of nearly \$96,928 in visitor spending per supported job. Dean Runyan estimates that visitor spending associated with travelers staying overnight in hotel, motel, and vacation rental accommodations in Mono County totaled roughly \$424.8 million in 2022. Applying the jobs multiplier derived from all visitor spending, BAE estimates that visitor spending associated with people staying in hotel, motel, and vacation rental accommodations supports 4,383 jobs, or around 73 percent of all jobs supported by destination visitor spending in Mono County. Dean Runyan further reports that the 2022 visitor spending and employment impact figures were based on an estimate of 662,159 total occupied room nights in hotel, motel, and vacation rental properties.<sup>11</sup> This implies a multiplier of 151 occupied room nights per supported job.

According to AirDNA, a private data vendor, the average STR in unincorporated Mono County was rented for 203 nights between December 2022 and November 2023. With an average of 203 occupied nights per STR, and 151 occupied nights per supported job, BAE estimates that the average STR supports around 1.3 jobs across the economy. Assuming 1.65 workers per household, based on data from the U.S. Census Bureau's Public Use Microdata Sample (PUMS), BAE estimates that the County may experience demand for 0.8 new workforce housing units for each new STR that enters the market on average, as reported in **Table 18**, below.

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<sup>9</sup> Dean Runyan and Associates. (April 2023). *The Economic Impact of Travel: California, 2022p (Preliminary)*. Prepared for Visit California. Available at: <https://industry.visitcalifornia.com/research/economic-impact>

<sup>10</sup> Direct employment represents jobs that are immediately supported by visitor spending, such as the hotel concierge and restaurant servers. Indirect employment represents jobs that are secondarily supported by visitor spending, such as grocery store suppliers, maintenance professionals, and other local area goods producers and service providers. Induced impacts are generated by households with earned income re-spending those dollars within the community on everyday goods and services.

<sup>11</sup> This figure is not reported in the 2022 travel impacts report, but was provided by Dean Runyan in an interview with BAE staff.

**Table 17. Workforce Housing Demand Induced by New STRs, Unincorporated Mono County, December 2022-November 2023**

**Visitor Spending Per Job Supported**

Destination Spending, Total (a)	\$580,600,000
<u>Supported Jobs, Total (b)</u>	<u>5,990</u>
<b>Spending Per Job Supported</b>	<b>\$96,928</b>

**Visitor Spending by Accommodation Type**

Hotel, Motel, Vacation Rental (c)	\$424,800,000
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**Jobs Supported by Accommodation Type**

Hotel, Motel, Vacation Rental (d)	4,383
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**Visitor Nights by Accommodation Type**

Hotel, Motel, Vacation Rental (e)	662,159
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**Visitor Nights Per Job Supported**

Hotel, Motel, Vacation Rental (f)	151
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**STRs Per Workforce Unit Demanded**

Ave. Occ. Nights Per Year (g)	203
Jobs Per Average STR (h)	1.3
<u>Workers Per Workforce Household (i)</u>	<u>1.65</u>
<b>Workforce Units Demanded per STR (j)</b>	<b>0.81</b>

Notes:

- (a) Includes all types of spending that occur at the destination, excluding spending for ground transportation and air travel impacts that accrue to other California visitor destinations, travel arrangement services and convention/trade show services.
- (b) Excludes employment impacts associated with other Travel, such as ground transportation and air travel impacts for travel to other California visitor destinations, travel arrangement services and convention/trade shows services.
- (c) Includes all destination spending associated with visitors staying in hotel, motel, and vacation rental accommodations
- (d) Equal to the total destination spending for travelers staying in hotel, motel, and vacation rental accommodations divided by the average visitor spending per job supported for the tourism industry in Mono County.
- (e) Equal to the total visitor nights for travelers staying in hotel, motel, and vacation rental accommodations, as reported by Dean Runyan through personal communication with BAE Urban Economics.
- (f) Equal to the total visitor nights for travelers staying in hotel, motel, and vacation rental accommodations divided by the total number of jobs supported by destination spending for travelers staying in said accommodations.
- (g) As reported by AirDNA, a private data vendor, for the period from December 2022 to November 2023.
- (h) Equal to the average occupied nights per year for STRs in Mono County divided by the average visitor nights per supported job.
- (i) Equal to the average number of workers per household as reported in the U.S. Census Bureau's Public Use Microdata Sample (PUMS) for the Public Use Microdata Area (PUMA) covering Alpine, Amador, Calaveras, Inyo, Mariposa, Mono, and Tuolumne counties.
- (j) Equal to the average number of STRs per unit of workforce housing demanded.

Source: Dean Runyan, The Economic Impact of Travel - California 2022p; Dean Runyan, Personal Communication; AirDNA; BAE, 2023.

# PART 5

## STAKEHOLDER ENGAGEMENT

Interviews were conducted to gain insight from community members about the issues of short-term rentals, housing needs and availability, and the potential connection between these topics. Interviews are distilled into themes and discussed in context with the findings of this study to help inform appropriate policy decisions.

### PROCESS

As part of the kick-off process, and prior to in-depth data collection and analysis, six groups of stakeholders were invited to participate in discussions about short-term rentals and workforce housing in Mono County. The groups, informed through Mono County staff, were based on similar interests, including housing, hotel/motel/lodging, small businesses, and short-term rental owners/operators. Each stakeholder interview had two to six people, lasted 45 minutes to one hour, and were conducted in-person by MIG and BAE at the Mono County Community Development office between December 11 and December 12. One additional interview was conducted virtually on January 18.

The County separately conducted a community survey to gather input and perspectives on the link between STRs and housing, policy and regulations related to the issue, and specific questions for owners and managers of STRs. The full survey results will be reported to the Board of Supervisors separately. At the time of publication, the survey results appeared to capture opinions about the Town of Mammoth Lakes' STR study, which is also underway.

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### QUESTIONS

The stakeholders were asked the same questions:

Do you believe there is a link between STR rentals and the housing situation? Why or why not?

Do you think short-term rental regulation should be a part of the County's approach to improving housing market conditions? If so, what approach(es) would you recommend the County consider, including changes to the current permit process?

What approaches do you think the County should consider to incentivize property owners to make more units available for long-term rentals?

Is there anything you'd like to add that hasn't been addressed?

### KEY TAKEAWAYS

The following key themes emerged from the interviews as shared ideas and pressing points. These reflect the consolidated perspectives of the stakeholders and are not attributed to any one person or group to maintain anonymity. Because each group came from a different perspective, themes have been grouped to account for contrasting viewpoints as well as suggestions overall.

## ISSUES/POINTS OF CONTENTION

- **Data and Recordkeeping:** Participants see the conversation around rentals and housing in the county as largely anecdotal and want to see data when possible. This includes data procured for this study, but also includes a call for better record keeping of STRs including the type of unit and owner details and tracking of illegal STRs. Others shared that some data, like the number of individuals/households displaced due to STR conversion, may not be feasible to collect because of the personal landlord-renter relationships that can exist in Mono County (i.e., an individual may be evicted so a landlord can convert a unit to an STR, but the individual and landlord may be friends, so the former tenant is not likely to lodge a fair housing complaint.)
- **Time vs. Immediacy:** Many participants indicated that Mono County has already put time and effort into creating its current regulation process, including gathering community input. These participants believe that any effects from the latest regulation overhaul are still taking shape, and more time is needed before they can be fully evaluated. Others believe that the worsening housing conditions in the county requires more immediate action.
- **Scaled Housing Solutions:** Some participants are concerned that regulating STRs further will not significantly increase housing availability because there are so few STRs in the County. Others believe any increased housing availability, however incremental, would result in an overall benefit to the community. Nearly all participants agreed that new, affordable housing stock is needed and is the most scalable solution.
- **Equity Lens vs Property Owner Rights:** Some participants believe the County has a duty to address housing inequity and that regulating or limiting STRs is a valid course of action. Others believe it is not the county's place to determine what an owner can or cannot do on their own land regarding short term rental activities.
- **Location-Specific Solutions:** Most participants noted the differences in issues of housing and short-term rentals across the county, and some noted the unique attributes of Mono County as a rural county. Many cited different workforce housing needs among each community. Most participants acknowledged that the vast majority of STRs are in June Lake and that a regulation for June Lake may not be the right approach in other parts of the County. Many participants were not aware of any STRs in their neighborhood or community, do not believe there is a one-size-fits all solution, and want to make sure individual community needs are considered.
- **Development Challenges:** Many participants noted it is difficult to develop housing in Mono County due to State regulations, State building requirements, costs of land and materials, limited availability and costs of labor, and limited private land availability.

## AREAS OF AGREEMENT

Virtually all participants agreed on the following:

- Housing availability has been an issue in Mono County (and Mammoth Lakes) even before short-term rentals became more prevalent.
- STRs have increased over time; however, some of the increased activity may stem from the prevalence of STRs in other areas. For example, an individual may be able to afford a second home in Mono County because they own several STRs elsewhere.
- Housing laws increasingly provide more rights to tenants and may discourage some property owners from wanting to operate long-term rentals.
- Most second homeowners do not want to make their own houses available to long-term renters because they want to be able to use their house occasionally.
- June Lake, in particular, needs a bed base to help keep June Mountain open. At the same time, June Mountain needs adequate housing opportunities for its employees.

## STR REGULATORY SUGGESTIONS

Not all participants agreed that further STR regulation is needed to address the issue of housing. For those who supported additional regulation, participants suggested the following:

**STR Data Collection:** Improve and comprehensively track the types of STR units and information about owners.

**Long-Term Rental Tracking:** Create a system to gather (potentially anonymous) information from community members, including complaints and potential violations.

**Enforcement:** Improve enforcement of STRs, including STRs without proper permits to discourage new/continued illegal STRs.

**Geographic Limitations:** Prohibit or limit new STRs in certain locations, such as June Lake.

**Zoning Limitations:** Begin regulating STRs in multi-family residential developments (that are currently allowed without permits).

**STR Prohibitions:** Prohibit all STRs throughout the county.

**Occupied STRs:** Allow STRs in accessory dwelling units (ADUs) and/or in primary residences when a long-term occupant (owner or long-term renter) lives on the premises.

## *WORKFORCE HOUSING SUGGESTIONS*

Participants unanimously said that, regardless of STR regulation, development of new affordable housing units is necessary. Additional themes included:

### **Incentives for New Units**

- Provide low-interest loans to develop ADUs in exchange for a deed restriction limiting to long-term rental use.
- Offer loans to rehabilitate/renovate existing units.
- Give waivers or other concessions to multiple-unit residential development projects.

### **Incentives for Long-term Rentals**

- Create renter-landlord matching programs. Matching programs could span renter selection, rental management, and rental maintenance so homeowners do not need to be involved.
- Reduce or eliminate fees for projects that deed-restrict for long-term renters.
- Offer grants or stipends to property owners in exchange for long-term lease restrictions.
- Provide lodging accommodations for free or a reduced rate for second homeowners who rent their own home to a long-term renter and/or local employee.

### **US Forest Service Cooperation**

- Exchange land or enter into lease agreements with the US Forest Service to allow for more land to be developed.

### **Proactive Approach**

- Purchase properties, such as existing long-term rentals or lodging properties, when they become available to convert/preserve for long-term housing.

# PART 6

## CONCLUSIONS AND OPTIONS

Mono County has a limited number of STRs in the unincorporated area, limited data points such as housing sales and rental availability information, an overall lack of STR concentration except potentially in June Lake, a high percentage of second homes, and regulations that are more stringent than most jurisdictions. These restrictive regulations, requiring two separate public hearings, presents uncertainty to potential STR owner/operators who are only allowed to have one STR in the unincorporated area.

It is difficult to draw a strong conclusion about the correlation between the number and prevalence of STRs and the lack of available housing in Mono County. Based on the County's history, there has been a long-standing issue with the shortage of affordable housing beyond when STRs had a strong presence in the community.

By contrast, Mammoth Lakes, (the only incorporated city in Mono County), has a strong concentration of STRs, which may be effectively pushing the local workforce towards the unincorporated areas of the county, and highlighting the shortage of long-term housing solutions. At the same time, some correlation does exist between the existence of STRs and the availability of housing for local employees based on job generation per occupied room.

Current Mono County policies have accomplished the goal of preventing an increase of STRs in unincorporated residential neighborhoods, while still providing a portion of the bed base in high-tourist areas such as June Lake.

### POLICY CONSIDERATIONS

Moving forward, the County may want to identify its objectives regarding short-term rentals and workforce housing availability to inform its policy and procedural changes. The following are sample policy objectives and policy changes that can be considered by the Board of Supervisors. The options are not mutually exclusive, and may be selected or omitted as needed.

<i>Policy Objective:</i> <b>Limit or decrease the number of existing STRs.</b>
Set a numeric cap on STR permits countywide. <ul style="list-style-type: none"><li>- The cap may be set at the current number of permits (106), or</li><li>- The cap could accommodate for a defined increase, or</li><li>- The cap could be set at a lower number than existing permits, or</li></ul>
Set a numeric cap on STR permits in a specified geographic location. <p>For example, the County may consider capping the number of STRs in June Lake at its current level.</p>

As a part of any cap, the County may want to establish a lottery or random selection system in the event the number of permits available is less than the number of interested permittees.

Alternatively, the County could establish a first-come, first-served system for available STR permits.

Change the General Plan and Zoning Code and prohibit STRs in some or all residential areas.

The County may want to phase this in through the permit renewal process.

*Policy Objective:* **Prevent neighborhood impacts and nuisances.**

Retain existing permitting requirements.

Increase violation fees.

Increase compliance staffing.

*Policy Objective:* **Discourage investment or commodification of housing.**

Implement a waiting period before any new property owner can apply for an STR permit.

Prohibit STR permits for a specified period where an eviction has occurred on properties in the previous two years.

Require registration for all long-term rentals, or for rentals between 30-90 days if an overall long-term rental registration is too resource-intensive.

This may prohibit individuals from renting properties for more than 30 days to avoid STR regulations and allowing short-term renters to cut the stay short.

Amend language in the code regarding property rights.

While the annual renewal process makes it clear that STR permits do not run with the land, the County Code does not use that explicit language.

Amend definition of short-term rentals of residential properties to include fractional ownership and/or time shares.

Prohibit new STRs.

*Policy Objective:* **Preserve and encourage workforce housing units.**

Require the same approval process for MFR units as SFR units, presuming that MFR units are primarily intended to be residential uses and appropriate for workforce housing.

Require a minimum STR size (floor area) for new STR permits to increase the likelihood that smaller housing units are retained as long-term housing and thereby more affordable to the local workforce.

Partner with an organization to create a renter-owner matching program (non-profit, partnership).

*Policy Objective:* **Increase available bed base without affecting long-term rental availability.**

Allow “hosted” STRs and change county definitions and regulations around “occupied” STRs.

A hosted STR could require a long-term occupant on any portion of the property in exchange for allowing an STR, rather than the owner/property manager simply being present for the duration of the rental.

Exempt hosted rentals from a permit cap (if adopted) or allow in zones that don’t otherwise allow STRs.

Allow a long-term renter to occupy an ADU on a property while still allowing short-term rentals in the main home.

This could be consistent with the General Plan goal of promoting a sharing economy because the ADU would be occupied full time, the primary use would be residential and the temporary short-term rental would remain as an accessory use.

Allow an ADU to be an STR if the main unit is occupied by the owner or a long-term renter.

*Policy Objective:* **Encourage development of workforce housing units.**

Allow one new STR to be permitted in exchange for three new workforce housing units, based on the job generation rate.

Publicize the County's pre-approved Accessory Dwelling Unit (ADU) plans.

Highlight State housing laws that ministerially allow 100% affordable housing developments.

Offer loans and/or grants for building or rehabilitating or preserving long-term housing.

Partner with Sierra Business Council or create an ombudsperson position to help shepherd housing development applicants through the development review and permitting process.

*Policy Objective:* **Adjust to the market and STR trends.**

Consolidate STR permitting and tracking and create a universal tracking system.

Collect code compliance data.

Track and report on STR TOT revenue.

Track and report on STR permit activity and trends in the County's annual report.

*Policy Objective:* **Create an equitable permitting process.**

Consolidate the permitting process into a single unified procedure with a single set of terms and requirements for all permits, regardless of land use designation. This could include the following:

- Require a Use Permit (Planning Commission) and STR Permit (Board of Supervisors) for all residential properties in all residential zoning districts.
- Consider giving VHR permit holders one year to submit an application for CUP and STR permits.
- Continue to require annual renewals for all STR Permits.

*Policy Objective:* **Engage with regional partners.**

Encourage the Town of Mammoth Lakes to regulate STRs. Additional regulations in Mammoth Lakes may help to maintain availability of long-term housing, which may help avoid impacts on long-term housing availability in the unincorporated county.

### *HOUSING DEVELOPMENT LIMITATIONS*

During the stakeholder engagement, some commenters stated that the development review process in Mono County makes it difficult and/or cost prohibitive to build workforce housing. There are several barriers or factors that are outside of the County's control.

- **State Codes:** Like all jurisdictions in California, Mono County is subject to, and must enforce, State laws for all development and construction. For example, the California Environmental Quality Act (CEQA) requires all development projects to be evaluated for their impacts on the environment. The California Building Standards Code (Cal. Code Regs., Title 24), which is updated every three years and includes energy requirements, applies to all construction projects. Similarly, all projects are subject to regulatory processes, such as tribal consultation requirements.
- **Development Costs:** The cost of land, labor, and materials comprise a large barrier to development in Mono County, in part because of scarcity of land and workforce, and in part due to location relative to building material availability.
- **Community Sentiment:** Like many jurisdictions, Mono County decisionmakers weigh the wishes of community members when making land use decisions. In some cases, this has led to housing projects being denied.

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Appendix A

**Attachment A: Occupancy and Vacancy Status by Census Designated Place (CDP), 2010 and 2020 Census (Page 1 of 2)**

**2010 Census**

<b>Study Area</b>	<b>Total Housing Units</b>	<b>Occupied Units</b>	<b>Vacant Units</b>	<i>For rent</i>	<i>Rented, not occupied</i>	<i>For sale only</i>	<i>Sold, not occupied</i>	<i>For seasonal or occasional use</i>	<i>For migrant workers</i>	<i>Other vacant</i>
Aspen Springs CDP	36	25	11	0	0	0	0	11	0	0
Benton CDP	159	122	37	7	2	1	1	16	0	10
Bridgeport CDP	357	257	100	23	1	9	1	47	0	19
Chalfant CDP	301	264	37	3	0	6	1	19	0	8
Coleville CDP	201	171	30	6	0	1	1	11	0	11
Crowley Lake CDP	499	367	132	11	1	9	2	98	0	11
June Lake CDP	820	290	530	18	3	14	1	487	0	7
Lee Vining CDP	112	85	27	5	0	1	0	13	8	0
McGee Creek CDP	30	21	9	0	0	0	0	8	0	1
Mono City CDP	94	63	31	0	0	0	1	28	0	2
Paradise CDP	87	74	13	1	0	1	0	11	0	0
Sunny Slopes CDP	156	85	71	0	0	0	0	69	0	2
Swall Meadows CDP	128	98	30	0	0	0	0	30	0	0
Topaz CDP	42	21	21	4	0	1	0	12	0	4
Twin Lakes CDP (b)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Virginia Lakes CDP (b)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Walker CDP	445	335	110	20	1	11	0	48	0	30

**2020 Census**

<b>Study Area</b>	<b>Total Housing Units</b>	<b>Occupied Units</b>	<b>Vacant Units</b>	<i>For rent</i>	<i>Rented, not occupied</i>	<i>For sale only</i>	<i>Sold, not occupied</i>	<i>For seasonal or occasional use</i>	<i>For migrant workers</i>	<i>Other vacant</i>
Aspen Springs CDP	41	28	13	5	0	1	0	7	0	0
Benton CDP	157	127	30	1	0	0	5	15	0	9
Bridgeport CDP	349	246	103	4	2	2	3	81	0	11
Chalfant CDP	313	268	45	4	0	1	1	14	0	25
Coleville CDP	190	150	40	9	3	3	2	20	3	0
Crowley Lake CDP	538	402	136	13	0	6	0	109	0	8
June Lake CDP	811	277	534	20	12	4	4	486	0	8
Lee Vining CDP	114	88	26	0	0	0	0	23	0	3
McGee Creek CDP	25	15	10	5	0	0	0	5	0	0
Mono City CDP	116	87	29	0	0	0	4	19	0	6
Paradise CDP	104	84	20	0	0	0	0	20	0	0

Sunny Slopes CDP	<b>156</b>	83	73	0	0	0	0	73	0	0
Swall Meadows CDP	<b>128</b>	94	34	2	0	0	0	31	0	1
Topaz CDP	<b>94</b>	73	21	0	0	1	0	10	0	10
Twin Lakes CDP (b)	<b>243</b>	24	219	3	2	3	0	209	0	2
Virginia Lakes CDP (b)	<b>104</b>	0	104	2	0	0	0	101	0	1
Walker CDP	<b>426</b>	326	100	5	0	8	7	43	4	33

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**Attachment A: Occupancy and Vacancy Status by Census Designated Place (CDP), 2010 and 2020 Census (Page 2 of 2)**

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Notes:

(a) Due to changes in CDP definitions that occurred between the 2010 and 2020 Decennial Census<sup>1</sup>, the observed change in the total number of housing units, as well as the number of occupied and vacant housing units is subject to unknown error and should be interpreted with significant caution.

(b) The 2010 Decennial Census did not include this CDP as a defined geography.

Sources: U.S. Census Bureau 2010 and 2020 Decennial Census, Table H1 and H5; BAE, 2023.

**Appendix B: Inventory of Hotel/Motel and Related Tourism Accommodation Providers, December 2023**

<b>Business Name</b>	<b>Address</b>	<b>Place</b>	<b>Rooms/Units</b>
THE OLD HOUSE & INN AT BENTON	55137 HIGHWAY 120	BENTON	11
ANNETT'S MONO VILLAGE	13425 TWIN LAKES ROAD	BRIDGEPORT	33
BIG MEADOW LODGE	74878 HIGHWAY 395	BRIDGEPORT	6
BRIDGEPORT INN	205 MAIN STREET	BRIDGEPORT	32
HUNEWILL GUEST RANCH	1110 HUNEWILL RANCH ROAD	BRIDGEPORT	(a)
MOORE BRIDGEPORT RENTALS	264 HWY 182	BRIDGEPORT	4
REDWOOD MOTEL	425 MAIN STREET	BRIDGEPORT	19
RUBY INN	333 MAIN STREET	BRIDGEPORT	30
SILVER MAPLE INN	310 MAIN STREET	BRIDGEPORT	20
THE BODIE HOTEL	287 MAIN STREET	BRIDGEPORT	7
THE CAIN HOUSE	340 MAIN STREET	BRIDGEPORT	10
VIRGINIA CREEK SETTLEMENT	70847 HIGHWAY 395	BRIDGEPORT	10
VIRGINIA LAKES RESORT	LITTLE VIRGINIA LAKES ROAD	BRIDGEPORT	20
WALKER RIVER LODGE	100 MAIN STREET	BRIDGEPORT	36
WILLOW SPRINGS RESORT	70970 HWY 395	BRIDGEPORT	35
ANDRUSS MOTEL	106964 HWY 395	COLEVILLE	13
MEADOWCLIFF LODGE & KOA	110437 US HWY 395	COLEVILLE	20
SIERRA RETREAT	106705 HWY 395	COLEVILLE	6
TOYABE MOTEL	107045 HWY 395	COLEVILLE	11
WEST WALKER MOTEL	106833 HWY 395	COLEVILLE	11
MCGEE CREEK LODGE	1561 CROWLEY LAKE DRIVE	CROWLEY LAKE	10
MONO SIERRA LODGE	4135 CROWLEY LAKE DRIVE	CROWLEY LAKE	(a)
ROCK CREEK LODGE	85 ROCK CREEK CANYON	CROWLEY LAKE	17
SIERRA GABLES	4015 CROWLEY LAKE DRIVE	CROWLEY LAKE	18
TOM'S PLACE RESORT	8180 CROWLEY LAKE DRIVE	CROWLEY LAKE	19
BIG ROCK RESORT	120 BIG ROCK ROAD	JUNE LAKE	18
BOULDER LODGE	40 BOULDER DRIVE	JUNE LAKE	62
DOUBLE EAGLE RESORT AND SPA	5587 CA-158	JUNE LAKE	32
GULL LAKE LODGE	132 BRUCE STREET	JUNE LAKE	15
HEIDELBERG INN EXTRA HOLIDAY	2635 HIGHWAY 158	JUNE LAKE	46
JUNE LAKE MOTEL	2716 HWY 158	JUNE LAKE	27
JUNE LAKE PINES	2733 HWY 158	JUNE LAKE	15
JUNE LAKE VILLIGER	2640 HWY 158	JUNE LAKE	22
LAKE FRONT CABINS	32 BRENNER ST	JUNE LAKE	10
REVERSE CREEK LODGE	4479 HWY 158	JUNE LAKE	15
SILVER LAKE RESORT	6957 HWY 158	JUNE LAKE	20
THE FOUR SEASONS RESORT LEGACY	24 VENICE STREET	JUNE LAKE	5
THE HAVEN	78 KNOLL AVENUE	JUNE LAKE	10
WHISPERING PINES CHALET	18 NEVADA STREET	JUNE LAKE	24
EL MONO MOTEL	51395 HWY 395	LEE VINING	11
LEE VINING MOTEL	51435 HWY 395	LEE VINING	8
LUNDY LAKE RESORT	5109 LUNDY LAKE RD	LEE VINING	8
MONO LAKE HOUSE	54880 HWY 395	LEE VINING	1
MURPHYS MOTEL	51481 HWY 395	LEE VINING	43
TIOGA LODGE	54411 HWY 395	LEE VINING	17
YOSEMITE GATEWAY	51340 HWY 395	LEE VINING	20
LAKEVIEW LODGE	51285 HWY 395	LEE VINING	46
CONVICT LAKE RESORT	2000 CONVICT ROAD	MAMMOTH LAKES	29
HOT CREEK RANCH, LLC	85 HOT CREEK HATCHERY ROAD	MAMMOTH LAKES	9

Note:

(a) Estimated room and/or unit count data was unavailable.

Sources: Mono County; BAE, 2023.



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: County Administrative Office**

**TIME REQUIRED** 5 minutes

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

Tyrone Grandstrand, Housing  
Opportunities Manager

**SUBJECT** Grant Agreement with Eastern Sierra  
Community Housing for Access  
Apartments

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Proposed contract with Eastern Sierra Community Housing pertaining to grant for development of affordable housing in the Access Apartments housing project.

**RECOMMENDED ACTION:**

Approve, and authorize CAO to sign, grant contract with Eastern Sierra Community Housing for development of affordable housing dated March 20th, 2024, and a not-to-exceed amount of \$600,000.

**FISCAL IMPACT:**

\$600,000 transfer from affordable housing fund to Eastern Sierra Community Housing once the contract requirements are met.

**CONTACT NAME:** Tyrone Grandstrand

**PHONE/EMAIL:** 760.932.5406 / tgrandstrand@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Staff Report</a>
<a href="#">Grant Agreement</a>

**History**

Time	Who	Approval
2/16/2024 7:56 AM	County Counsel	Yes

2/14/2024 9:49 AM

Finance

Yes

2/16/2024 10:13 AM

County Administrative Office

Yes



COUNTY ADMINISTRATIVE OFFICER  
COUNTY OF MONO  
Sandra Moberly, MPA, AICP

ASSISTANT COUNTY ADMINISTRATIVE OFFICER  
Christine Bouchard

February 20, 2024

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Karin Humiston

PUBLIC WORKS

Paul Roten

To: Mono County Board of Supervisors

From: Tyrone Grandstrand, Housing Opportunities Manager

RE: Grant Agreement with Eastern Sierra Community Housing for Access Apartments

**Strategic Plan Focus Area(s) Met**

- A Thriving Economy     Safe and Healthy Communities     Mandated Function
- Sustainable Public Lands     Workforce & Operational Excellence

**Recommended Action:**

Staff recommends that the Board:

1. Approve proposed grant agreement.

**Background and Summary:**

The Board previously approved \$600,000 in grant funding to Eastern Sierra Community Housing ("ESCH") for their Access Apartments project ("the project") on November 7<sup>th</sup>, 2023. The project will rehabilitate buildings at 238 Sierra Manor Road in Mammoth Lakes to create 13 units of housing affordable at various levels of income. The proposed grant agreement is the next step in supporting the project with the approved funding.

**Attachments**

Attachment 1: Grant Agreement with Eastern Sierra Community Housing for Access Apartments

## **GRANT AGREEMENT**

This Grant Agreement (this “Agreement”) is entered as of \_\_\_\_, 2024, between the County of Mono, (“County”) a political subdivision of the State of California, and Eastern Sierra Community Housing, Inc., (ESCH) a California nonprofit public benefit corporation, with respect to the following facts:

**PARTIES:** This Agreement between ESCH, with primary place of business at 587 Old Mammoth Road, Suite #4, P.O. Box 260, Mammoth Lakes, CA 93546 and the County, 74 N. School Street, P.O. Box 696, Bridgeport, CA 93517 for the provision of financial support for the Access Apartment project located at 238 Sierra Manor Road, Mammoth Lakes, CA 93546. The County and ESCH shall be referred individually as “the Party” or collectively as “the Parties.”

## **RECITALS**

**WHEREAS**, the County supports the creation of additional affordable housing units within the County; and

**WHEREAS**, ESCH acquired the commercial property located at 238 Sierra Manor Road for the purpose of rehabilitating the property into thirteen (13) affordable housing units referred to as the Access Apartments project (“Project”); and

**WHEREAS**, funding for the Project includes Federal and State grants secured by ESCH and the Town of Mammoth Lakes, a commitment of funds from the Town of Mammoth Lakes and the County, other grants and donations, and use of ESCH resources; and

**WHEREAS**, as of February 2024, there is an anticipated budget shortfall of approximately \$\_\_\_\_\_, which is to be made up by ESCH willing to forego a portion of, the reimbursement for prior expenses, including payments on the site acquisition loan, predevelopment professional services (i.e., construction drawings, NEPA/CEQA environmental review, etc.), and ESCH developer fees; and

**WHEREAS**, to meet cashflow requirements, the County is committed to providing the within funds to eliminate ESCH incurring additional construction loan costs; and

**WHEREAS**, the County recognizes the risk and the potential for substantial unknown costs that are inherent in rehabilitation projects such as the proposed Project that involve the conversion of existing commercial structures into residential housing units; and

**WHEREAS**, the provision of additional affordable units meets the County’s Strategic Plan Focus Areas of 1) A Thriving Economy, 2) Safe and Health Communities, and 3) Workforce and Operational Excellence.

**NOW THEREFORE THE PARTIES AGREE AS FOLLOWS:**

**FUNDING:** The Board of Supervisors has authorized six hundred thousand dollars (\$600,000) of funding be provided as a grant to support the Project located at 238 Sierra Manor Road, Mammoth Lakes, CA 93546. The Board of Supervisors has further authorized County Administrative Officer to execute all necessary documents to effectuate the grant and intends this instrument to reflect the terms of the grant.

**PURPOSE OF FUNDING:** The County is providing funding to ESCH to support the creation of up to 13 units of affordable housing. The funding will be provided for the following purposes:

- Construction of up to 13 affordable housing units with income levels ranging from very low to moderate income levels.
- Provide cash flow needs through the construction project as grant reimbursements can take several weeks.
- The County grant funds are not intended to be used by ESCH for the reimbursement of previously expended ESCH funds related to property acquisition, predevelopment design costs (i.e., construction drawings environmental review, etc.), ongoing maintenance and property management, and/or carrying costs (i.e., insurance, snow removal, etc.).

**TERM:** The funding provided for in this Agreement will be provided within sixty (60) days of the issuance of building permits for the Project.

**INDEMNIFICATION:** ESCH, and any respective successors and assigns, shall indemnify, defend, and hold the County, its elected and appointed officials, employees, agents, successors, and assigns, free and harmless of any and all claims, liability, loss, damage, or expenses resulting from performance by ESCH, or any contractor, of the work funded in whole or part by the County.

**PUBLIC BENEFIT:** The County supports the expansion in the number of affordable community housing units available for the regional workforce. The provision of additional affordable units meets the County's Strategic Plan.

**LAWS & REGULATIONS; EMPLOYEE/LABOR CERTIFICATIONS:** ESCH shall keep itself fully informed of and in compliance with all local, state, and federal laws, rules and regulations in any manner affecting the work performed or contracted for related to the Project as provided for herein. ESCH shall indemnify the County against any alleged violations of this paragraph, including, but not limited to, any fines or penalties imposed by any governmental agency.

**GOVERNING LAW; VENUE; GOVERNMENT CODE CLAIM COMPLIANCE; ATTORNEY'S FEES:** This Agreement shall be interpreted in accordance with the laws of the State of California. If any action is brought to interpret or enforce any term of this Agreement, the action shall be brought in a state or federal court situated in Mono County, California. In addition to any and all

contract requirements pertaining to notices of and requests for compensation or payment for extra work, disputed work, claims and/or changed conditions, ESCH must comply with the claim procedures set forth in Government Code sections 900 et seq. prior to filing any lawsuit against the County. Such Government Code claims, and any subsequent lawsuit based upon the Government Code claims shall be limited to those matters that remain unresolved after all procedures pertaining to extra work, disputed work, claims, and/or changed conditions have been followed by ESCH. If no such Government Code claim is submitted, or if any prerequisite contractual requirements are not otherwise satisfied as specified herein, ESCH shall be barred from bringing and maintaining a valid lawsuit against the County. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing Party shall be entitled to recover all reasonable fees and costs incurred, including reasonable attorneys' fees, as determined by the court.

**ASSIGNMENT; AMENDMENT:** This Agreement may not be modified or altered except in writing signed by both Parties.

**ENTIRE AGREEMENT; CONSTRUCTION & CAPTIONS:** This is an integrated Agreement representing the entire understanding of the Parties as to those matters contained herein and supersedes and cancels any prior oral or written understanding or representations with respect to matters covered hereunder. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. The captions of the various paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

**EXECUTION:** The individuals executing this Agreement represent and warrant their authority to bind their respective parties. This Agreement may be executed in counterparts, each of which shall be deemed an original. This Agreement may be signed electronically, and a facsimile or electronically stored copy of this Agreement shall be treated as an original.

[signatures on following page]

MONO COUNTY

Approved by:

---

SANDRA MOBERLY  
COUNTY ADMINISTRATIVE OFFICER

EASTERN SIERRA COMMUNITY HOUSING

Reviewed and Approved by:

---

Name: PATRICIA ANN ROBERTSON  
Title:

APPROVED AS TO FORM

---

NAME: CHRISTOPHER BECK  
TITLE: ASSISTANT COUNTY COUNSEL



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Clerk of the Board, Sponsored by Supervisor Salcido**

**TIME REQUIRED** 10 minutes

**PERSONS** Supervisor Salcido

**SUBJECT** Request for Letter of Support for  
Yosemite Area Regional  
Transportation System (YARTS)

**APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Request from Merced County Association of Governments for a Yosemite Area Regional Transportation System (YARTS) letter of support for the community project funding for four new, over-the-road, clean-diesel coaches.

**RECOMMENDED ACTION:**

Approve letter of support and authorize the Board Chair to execute letter on behalf of the Mono County Board of Supervisors.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** Danielle Patrick

**PHONE/EMAIL:** 7609325535 / despinosa@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Letter</a>

**History**

Time	Who	Approval
2/15/2024 5:01 PM	County Counsel	Yes
2/15/2024 2:37 PM	Finance	Yes

2/16/2024 10:15 AM

County Administrative Office

Yes



Jennifer Kreitz-District One   Rhonda Duggan-District Two   Bob Gardner-District Three  
John Peters-District Four   Lynda Salcido-District Five

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## **BOARD OF SUPERVISORS COUNTY OF MONO**

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P.O. BOX 715, BRIDGEPORT, CALIFORNIA 93517  
(760) 932-5530 • FAX (760) 932-5531

*Queenie Barnard, Clerk of the Board*

February 20, 2024

The Honorable John Duarte  
U.S. House of Representatives  
1535 Longworth House Office Building  
Washington, DC 20515

Dear Representative Duarte,

Mono County is pleased to offer support for YARTS's request for community project funding through the Fiscal Year 2025 appropriations.

The Yosemite Area Regional Transportation System – or YARTS – is a Joint Powers Authority comprised of the Counties of Merced, Mariposa, Mono, Madera, and Tuolumne. YARTS has worked in close partnership with the National Park Service for more than 20 years in providing public transit service to Yosemite National Park from the communities of Merced, Mariposa, Sonora, Mammoth Lakes, Oakhurst, and Fresno.

The current YARTS fleet includes four over-the-road coaches that are near the end of their useful life and require replacement in the next year. These clean-diesel buses are critical for YARTS to continue to operate throughout its rural, mountainous, 480-square mile service area. Without a reliable clean-diesel bus fleet, there will be a lack of public transportation resources for visitors and community members who wish to travel to Yosemite.

The YARTS service is critical to our region. One key reason is that YARTS helps advance tourism stewardship and sustainability by creating less car traffic. Before the pandemic, YARTS carried more than 100,000 individuals to and from the Park every year. These passengers provide key sources of tourism revenue and generate jobs in gateway communities. They also include individuals who cannot access the wonder of Yosemite any other way.

We respectfully request your strong support of YARTS.

Sincerely,

SUPERVISOR JOHN PETERS  
MONO COUNTY BOARD CHAIR



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Elections**

**TIME REQUIRED** 20 minutes

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

Queenie Barnard, Registrar of Voters

**SUBJECT** Election Education Series Part 4:  
Results, Canvass/Certification,  
Recounts, and Fraud Prevention

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

In anticipation of the upcoming March 5, 2024, Presidential Primary Election, the Mono County Registrar will be presenting a four-part Election Education Series to the Board of Supervisors and public. Part 4 of the series will review Results, Canvass/Certification, Recounts, and Fraud Prevention.

**RECOMMENDED ACTION:**

None, informational only. Provide any desired direction to staff.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** Queenie Barnard

**PHONE/EMAIL:** 7609325534 / qbarnard@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Staff Report</a>
<a href="#">Presentation</a>

**History**

Time	Who	Approval
2/13/2024 10:00 AM	County Counsel	Yes
1/9/2024 1:25 PM	Finance	Yes

2/13/2024 7:33 PM

County Administrative Office

Yes



**CLERK – RECORDER – REGISTRAR  
CLERK OF THE BOARD OF SUPERVISORS  
COUNTY OF MONO**

P.O. BOX 237, BRIDGEPORT, CALIFORNIA 93517 • (760) 932-5530

[ClerkRecorder@mono.ca.gov](mailto:ClerkRecorder@mono.ca.gov) • [Elections@mono.ca.gov](mailto:Elections@mono.ca.gov) • [BOS@mono.ca.gov](mailto:BOS@mono.ca.gov)

February 20, 2024

**To:** Honorable Chair and Members of the Board of Supervisors

**From:** Queenie Barnard, Clerk-Recorder-Registrar

**Re:** Election Education Series Part 4

**Discussion:**

In anticipation of the upcoming March 5, 2024 Presidential Primary Election, the Elections Office will be presenting a four-part Election Education Series to the Board of Supervisors and public between January-February 2024.

Election Education Series Part 1	January 9, 2024	Voter Registration and Primary Election Voting
Election Education Series Part 2	January 16, 2024	Election Technology, Security, and Observers
Election Education Series Part 3	February 6, 2024	Voting In Person at a Poll Place vs Voting by Mail
Election Education Series Part 4	February 20, 2024	Results, Canvass/Certification, Recounts, and Fraud Prevention

Please contact me if you have any questions. Thank you.

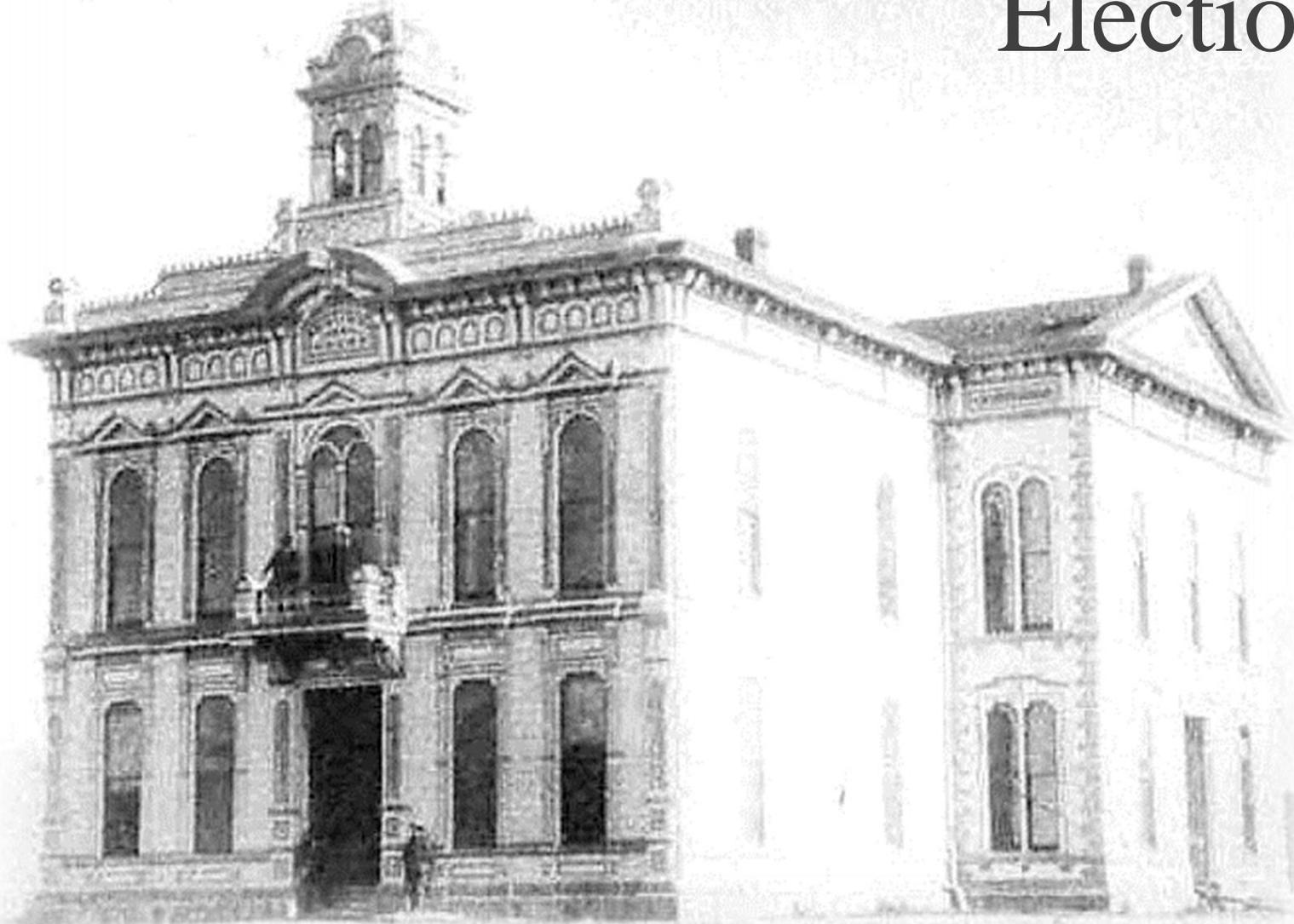
Queenie Barnard  
Clerk-Recorder-Registrar  
760-932-5534  
[qbarnard@mono.ca.gov](mailto:qbarnard@mono.ca.gov)

# Election Education Series

## Part 4

Results, Canvass/Certification,  
Recounts, and Fraud Prevention

February 20, 2024



# Election Education Series

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<https://monocounty.ca.gov/elections/page/election-education-series>

Election Education Series Part 1	January 9, 2024	Voter Registration and Primary Election Voting
Election Education Series Part 2	January 16, 2024	Election Technology, Security, and Observers
Election Education Series Part 3	February 6, 2024	Voting In Person at a Poll Place vs Voting by Mail
Election Education Series Part 4	February 20, 2024	Results, Canvass/Certification, Recounts, and Fraud Prevention

# March 5, 2024, Presidential Primary Election

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**February 5, 2024:** Ballots are mailed to every registered voter

**February 6, 2024:** Ballot drop boxes are opened throughout the State of California

**March 5, 2024:** Election Day (Polls Open 7 AM - 8 PM)

**March 22, 2024:** Registrar of Voters to certify election results



# March 5, 2024, Presidential Primary Election

<b>Polling Place Location</b>		<b>Voting Precinct</b>
All Poll Places are open Election Day 7 am to 8 pm		
Walker Community Center 442 Mule Deer Dr., Walker, CA 96107		01 - Antelope
Bridgeport Memorial Hall 73 School St., Bridgeport, CA 93517		03 - Bridgeport
Chalfant Community Center 123 Valley Rd., Chalfant Valley, CA 93514		04 - Tri-Valley
June Lake Community Center 90 W. Granite Ave., June Lake, CA 93529		05 - June Lake
Crowley Lake Community Center 58 Pearson Rd., Crowley Lake, CA 93546		07 - Long Valley
Mammoth Lakes High School 365 Sierra Park Dr., Mammoth Lakes, CA 93546		08 - Mammoth Meadow 09 - Mammoth Minaret 10 - Mammoth Pinecrest 12 - Mammoth View 13 - Old Mammoth
<b>Ballot Drop Box Locations (open 02/06/2024)</b>		
All Ballot Boxes are open 24 hours a day and are locked at 8 pm on Election Day		
442 Mule Deer Dr., Walker, CA 96107		73 School St., Bridgeport, CA 93517
123 Valley Rd., Chalfant Valley, CA 93514		90 W. Granite Ave., June Lake, CA 93529
58 Pearson Rd., Crowley Lake, CA 93546		1290 Tavern Rd., Mammoth Lakes, CA 93546
<b>Mono County Elections</b>		
Ballots can be delivered to this office Mon - Fri 8 am - 5 pm, or Election Day 7 am - 8 pm		

74 School St., Annex I, Bridgeport, CA 93517  
Elections: 760-932-5537 Main: 760-932-5530

# Vote-by-Mail Ballot Processing on Election Day

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## Central Count Ballot Scanner / Tabulator

- Ballots, scanned in batches, are processed based on jurisdictional requirements and preferences.
- Once scanned, ballots meeting certain conditions (e.g. write-in candidate, over vote, etc.) are automatically sent to the Adjudication application for digital ballot review.



# What Happens to a Ballot Cast at a Polling Place?

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After Polls have closed at 8:00 PM on Election Day:

- County IT / Elections Staff shut down voting machines.
- Ballots and CompactFlash memory cards are collected from each voting machine.
- Ballot Transport Teams of two transport Ballots and CompactFlash memory cards from each polling location to the Elections Office in Bridgeport.

# Results & Tally Reporting

- Initial results will be available after 8:00 PM on Election Day and posted on the Election Results page.
- These semi-official results will include early Vote-by-Mail ballots received and Bridgeport Polling Place results.
- Results will be updated as additional polling place ballots are delivered to our office throughout the evening.
- When all precincts are 100% reporting, then all polling places have returned to our office with their ballots. **This does not mean all ballots have been counted.**
- Results will continue to be updated daily as Vote-by-Mail ballots are received and processed.

## SEMI-OFFICIAL RESULTS

### [Semi-Official Election Summary Report](#)

(Updated November 7, 2023, 8:35 PM)

Next Update: November 8, 2023, 4:00 PM

### SEMI-OFFICIAL RESULTS POSTED INCLUDE:

- All Vote-by-Mail ballots received by 8 p.m., November 7, 2023.
- All cured ballots with Signature Verification Statements received by 8 p.m., November 7, 2023.

### PLEASE NOTE THE FOLLOWING:

- Ballots postmarked on or before Election Day can be received and counted until November 14, 2023.
- Ballots with Mismatched Signature or Missing Signature can be "cured". Signature Verification Statements must be received by the Mono County Elections office no later than 5 p.m. two (2) days prior to certification of the election, November 20, 2023.
- The Registrar of Voters will certify election results on November 22, 2023. **Results are not final until certified.**

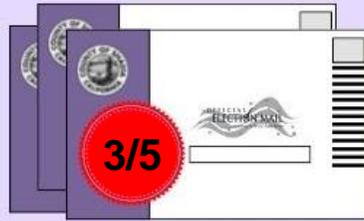
### ELECTION RESULTS MAP:



# Results & Tally Reporting

## BALLOTS COUNTED AFTER ELECTION DAY

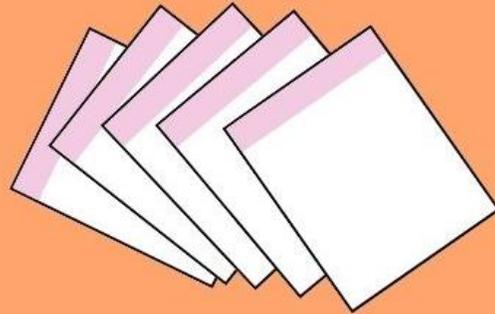
**POSTMARKED  
VOTE BY MAIL BALLOTS**



**"LAST MINUTE"  
VOTE BY MAIL BALLOTS**



**PROVISIONAL BALLOTS**



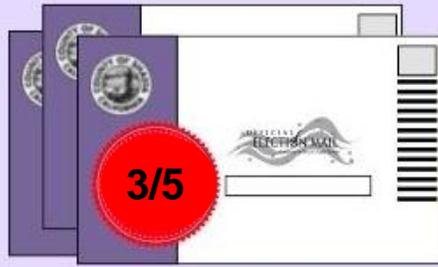
**DAMAGED/UNREADABLE  
BALLOTS**



# Results & Tally Reporting

---

## POSTMARKED VOTE BY MAIL BALLOTS



- By law we must count ballots received after Election Day if they are postmarked on or before Election Day and arrive by mail no later than 7 days after the election. The number of ballots that arrive by mail after Election Day is unpredictable and varies each election.
- **Ballots postmarked on or before Election Day can be received and counted until March 12, 2024.**
- Ballots received by other counties must be forwarded to Mono County no later than eight days after receipt and will be counted provided they were received by the other county on or before Election Day.

# Results & Tally Reporting

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## **"LAST MINUTE" VOTE BY MAIL BALLOTS**

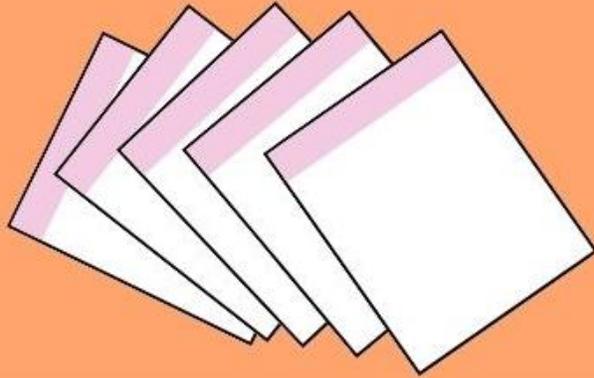


- Vote-by-Mail ballots received at the last minute are counted after Election Day. These include:
  - Vote-by-Mail ballots retrieved from drop boxes on March 4, 2024 and Election Day.
  - Vote-by-Mail ballots dropped off at polling locations on Election Day.

# Results & Tally Reporting

---

## PROVISIONAL BALLOTS



- Provisional ballots are processed after Election Day and will be counted after elections officials have confirmed the person's eligibility.
- Provisional ballots are cast by voters who arrived at a polling place, but their name was not on the voter list, or their information is incorrect.

# Results & Tally Reporting

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## DAMAGED/UNREADABLE BALLOTS



- Ballots that are torn, damaged, or marked in a way that make tallying by machine impossible will require additional processing. This can include duplication and/or adjudication.
- UOCAVA (Uniformed and Overseas Citizens Absentee Voting Act) and RAVBM (Remote Accessible Vote-By-Mail) ballots also require duplication.

# Results & Tally Reporting

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## Challenged Ballots

Your Ballot Envelope (General Election 2022)

x *Signature*

Your Voter Registration Record (2019)

*Signature*

Your Voter Registration Record (2017)

*Signature*

Your Voter Registration Record (2010)

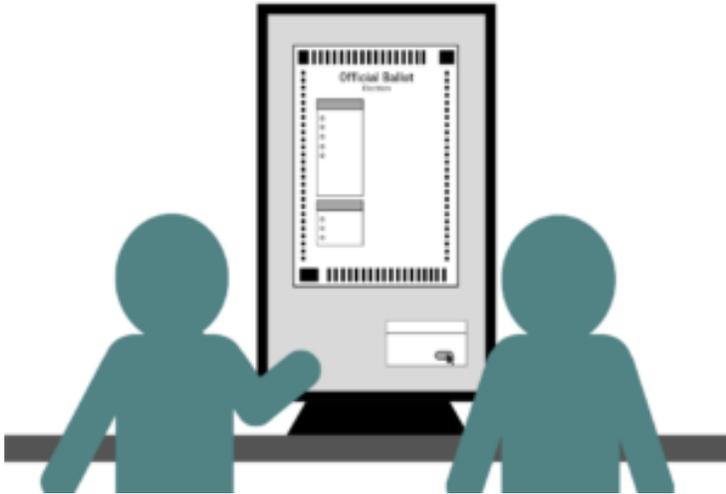
*Signature*

- A vote-by-mail ballot must be signed by the voter to whom it was printed for and then signature verified by human eyes before they are counted.
- If a ballot envelope is returned with no signature, it will immediately be challenged.
- If a ballot envelope is returned with a signature that does not match the voter's registration record, it will be challenged.
- Voters will be alerted via email (if an email is on file) within 24 hours of their ballot being challenged. Election staff will also mail out letters with instructions on how to "cure" (fix) the ballot.
- Signature Verification Statements must be received by the Mono County Elections office no later than 5 p.m. two (2) days prior to certification of the election, March 20, 2024.

# Results & Tally Reporting

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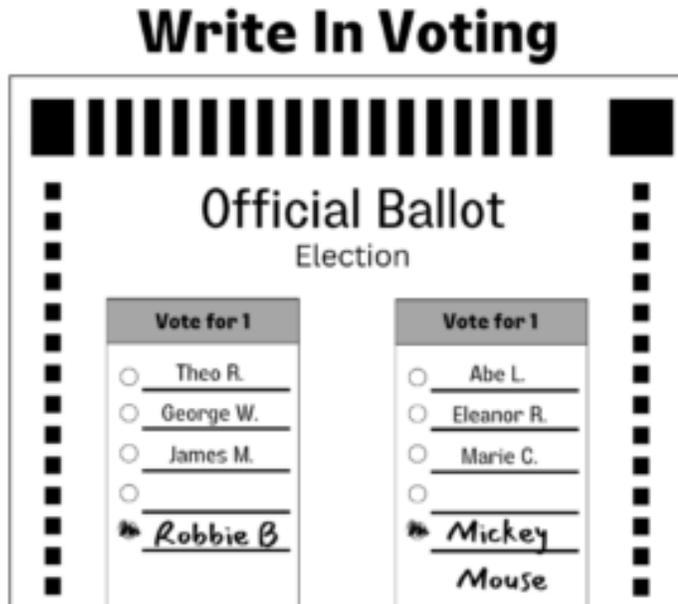
## Adjudication



- Adjudication is the process of reviewing a ballot that has been flagged during scanning.
- There are many reasons why a ballot is flagged and must go into adjudication.
  - A voter may have written in a candidate (the machine cannot read handwriting).
  - Too many candidates/choices were selected.
  - There are ambiguous marks on the ballot that the scanner cannot read.
- This process must be done in teams of two. Using what they can see on the ballot, the team will confirm the voter's intention before submitting the ballot for tabulation.
- Adjudication is time consuming, requires multiple staff members and can slow down the speed of tabulation if there are large quantities of ballots in need of review.

# Results & Tally Reporting

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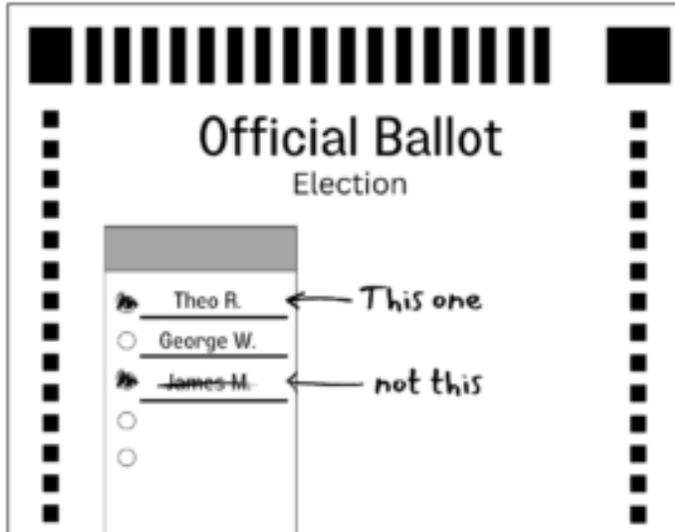


- This voter wrote in two candidates not printed on the ballot. Only certified write in candidates (those who have filed paperwork with the elections office to become a write in candidate) will be counted.
- Fictional characters, random names and non-certified candidates for a contest will not be counted.
- In this case, Mickey Mouse must be rejected as a vote because he is not a real candidate. If Robbie B. is a certified write in candidate, that vote will be counted.

# Results & Tally Reporting

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## Mistake Votes



- This voter made a mistake, fixed it themselves and then made notes for the Election Office. A team can clearly see the voter's intention and will reject James M. as a selection.

# Results & Tally Reporting

## Overvoting & Ambiguous Marks

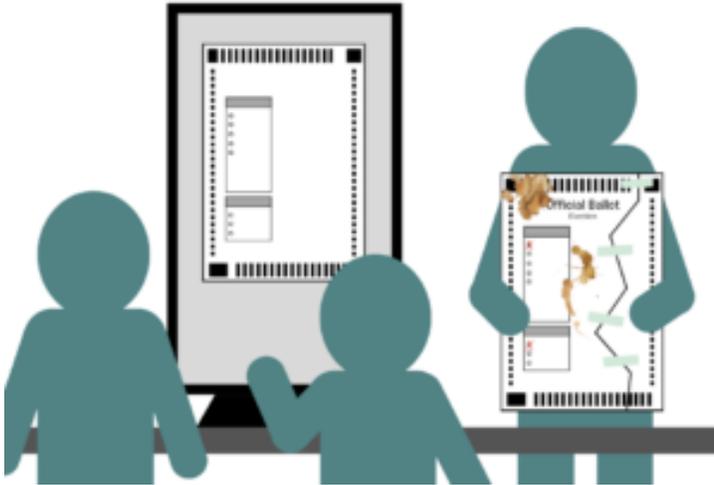


- This voter overvoted in one contest, wrote a random note at the corner and scribbled something unreadable at the center of the ballot.
- The overvoted contest cannot be counted and the team reviewing the ballot will do nothing because it is impossible to confirm the voter's intention.
- The ambiguous scribble is clearly not a vote and the "Buy milk later" has nothing to do with the ballot. Those marks will be ignored and do not affect the contests.
- The vote for Abe L. will be counted.

# Results & Tally Reporting

---

## Duplication



- Duplication is the process of remaking a ballot that has been damaged and cannot be read by a scanner.
- A ballot is considered damaged if:
  - It is torn, cut or ripped
  - It is covered by a substance that makes it impossible to scan (gum, stickers, coffee, etc.)
  - It is marked by a red pen (or other colors besides black and blue)
- UOCAVA (Uniformed and Overseas Citizens Absentee Voting Act) ballots printed by the voter and submitted by fax or mail must be duplicated.
- RAVBM (Remote Accessible Vote-By-Mail) ballots printed by the voter and submitted by mail must be duplicated.

# Canvass

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- The canvass is a culmination of all the data generated during an election cycle.
- More importantly, it is a process that allows election officials to confirm the accuracy of election data and identify areas for improvement.
- By law, California county elections officials have 30 days, also known as the canvass period, to count every valid ballot and conduct a required post-election audit.

# Canvass

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- During the official canvass of every election in which a voting system is used, the official conducting the election shall conduct a public 1% manual tally of the ballots tabulated by those devices, including vote by mail ballots.
- If 1% of the precincts is less than one whole precinct, the tally shall be conducted in one precinct chosen at random by the elections official.
- In addition to the 1% count, election officials shall, for each race not included in the initial group of precincts, count one additional precinct. The manual tally in that additional precinct shall apply only to the race not previously counted.

# Certification

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- Election certification refers to the process of election officials attesting that the tabulation and canvassing of the election are complete and accurate and that the election results are a true and accurate accounting of all votes cast in a particular election.
- County elections officials must finalize their official results to the Secretary of State by 30 days after the election. The Secretary of State will then certify the results 38 days after the election.
- The Registrar of Voters will certify election results on March 22, 2024. **Results are not final until certified.**

# Recounts

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- In local contests, it is common for a handful of votes to determine the outcome of the election.
- A recount is the actual retabulation of voted ballots to confirm the certified election results.
- Any registered California voter can request a recount.
- The request for a recount must be filed within five calendar days after the completion of the official canvass.
- The Registrar starts the recount no later than seven calendar days following the receipt of the request.
- The party requesting the recount pays the actual costs to conduct the recount.

# Fraud Prevention

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- Ballot reconciliation is a routine part of the official vote counting canvass that happens after the election.
- Every signature on a vote-by-mail ballot envelope is compared against the signature on the voter's registration form. If it does not match the ballot, it is not counted.
- "First in wins." If a voter was issued more than one ballot, whichever ballot is received by our office first is the one that is counted.
- All voting systems are tested and certified by the Secretary of State. Counties are required to perform logic and accuracy testing on voting systems prior to each election.
- Report any suspected illegal voting to the Secretary of State's Election Fraud Investigation Unit at (916) 657-2166 and to Mono County Elections immediately.

# Keep Up to Date on Elections!

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Visit [monocounty.ca.gov/elections](https://monocounty.ca.gov/elections) for more information.

- Candidates
- Measures
- Voter Information Guides
- Where to Vote
- Ways to Vote
- Election Results
- Frequently Asked Questions (FAQs)
- Subscribe to Election Updates

# Questions?

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Phone: (760) 932-5537

Email: [elections@mono.ca.gov](mailto:elections@mono.ca.gov)

Website: <https://monocounty.ca.gov/elections>

Office: 74 N. School Street, Bridgeport, CA 93517

Mailing Address: PO Box 237, Bridgeport, CA 93517





**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Public Works - Recreation**

**TIME REQUIRED** 15 minutes

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

Marcella Rose, Sustainable  
Recreation Coordinator

**SUBJECT** Recreation Projects of Interest - Inyo  
National Forest Over Snow Vehicle  
and CSA#1 Recommended Trails

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Update the Board on two projects currently being worked on by the Sustainable and Outdoors Recreation division: (1) trail maintenance and development within the boundaries of County Service Area 1 (Crowley, Sunny Slopes, Tom's Place and surrounding areas); and (2) Inyo National Forest Over Snow Vehicle Designation Project.

**RECOMMENDED ACTION:**

None, informational only.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** Marcella Rose

**PHONE/EMAIL:** 760-616-4953 / mrose@mono.ca.gov

**SEND COPIES TO:**

NA

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

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<a href="#">Staff Report</a>

**History**

Time	Who	Approval
2/15/2024 5:01 PM	County Counsel	Yes
2/7/2024 9:33 AM	Finance	Yes

2/16/2024 10:14 AM

County Administrative Office

Yes



# MONO COUNTY DEPARTMENT OF PUBLIC WORKS

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POST OFFICE BOX 457 • 74 NORTH SCHOOL STREET • BRIDGEPORT, CALIFORNIA 93517  
760.932.5440 • Fax 760.932.5441 • [monopw@mono.ca.gov](mailto:monopw@mono.ca.gov) • [www.monocounty.ca.gov](http://www.monocounty.ca.gov)

**Date:** February 20, 2024  
**To:** Honorable Chair and Members of the Board of Supervisors  
**From:** Marcella Rose, Sustainable Recreation Coordinator  
**Re:** Current Recreation Projects of Interest

## **History:**

### *INYO NATIONAL FOREST OVER SNOW VEHICLE DESIGNATION PROJECT*

The Inyo National Forest (INF) is regionally known for their network of motorized winter recreation. Motorized recreation is managed by the U.S. Forest Service (USFS) through a roads management strategy termed the Travel Management Rule (36 CFR part 212). As part of Travel Management, Subpart C, the INF is required to review the network of winter motorized recreation areas (including routes) and determine which of these areas will legally allow or disallow winter motorized travel. This intensive process is supported by inter-agency collaboration and will result in a comprehensive Environmental Assessment and a map depicting legal winter motorized travel areas, termed an "Over Snow Vehicle Use Map" (OSVUM). This process is expected to take approximately 5 years to complete.

### *COMMUNITY SERVICE AREA 1 TRAILS PROJECT*

County Service Area 1 (CSA1) is a legislatively authorized funding mechanism which enables Counties to focus a portion of County property taxes towards a specific region in order to provide services not otherwise available countywide. The Board of Supervisors appoints volunteers from the community to sit on an advisory board tasked with identifying and recommending projects within the boundaries of the CSA. Those boundaries span from the Ormat Geothermal Plant south to the communities of Sunny Slopes and Tom's Place. The CSA1 advisory board has recommended that the County fund and work collaboratively with the Inyo National Forest in the legalization / creation of connector trails within the CSA1 boundaries. County involvement has previously been approved as part of the Sustainable Recreation FY23-24 Overall Work Plan.

## **Discussion:**

### *INYO NATIONAL FOREST OVER SNOW VEHICLE DESIGNATION PROJECT*

At this meeting, we are informing the Board that this Travel Management Subpart C process is occurring and how Mono County could be involved within the process. This process has previously been approved as part of the Sustainable Recreation FY23-24 Overall Work Plan. This process will adjust where recreationists within Mono County can legally do winter motorized travel (such as snowmobiling), by either adding or taking away areas that are currently legal, thus having the potential for significant recreation impacts regionally. Mono County has been invited by the INF to enter into a Cooperating Agency agreement within this process; a Cooperating Agency is one that assists the INF in the development of the Environmental Assessment through the contribution of data and expertise. For example, Mono County may be asked to provide trail user data, or data related to economic benefits from winter recreation. Mono County may also be asked to participate in conversations related to the development of the proposed action (OSVUM) and alternatives, although it is important to note that Mono County will have NO decision authority under this agreement, only advisory, and that the INF remains the sole decision maker of the outcome of the Subpart C Process. This presentation is to inform the Board that the Sustainable Recreation Coordinator is participating in this process and is working

with the INF towards a draft Cooperating Agency agreement, which will be presented to the Board for approval at a future time.

*COMMUNITY SERVICE AREA 1 TRAILS PROJECT*

At this meeting, we are informing the Board that Mono County is working with CSA1 and the Inyo National Forest to explore feasibility of trails within the CSA1 boundary; this task has previously been approved within the Sustainable Recreation FY23-24 Overall Work Plan. At this time, the CSA1 would like to focus on a set of trails that connect Tom's Place to the well-loved Lower Rock Creek Trail, with potential for additional connector trails north in the vicinity between Hilton Creek and McGee creeks. We plan to continue work with the CSA1 members to prepare a proposal for the connector trail alignment, for submission to the Inyo National Forest.

If you have questions regarding this item, please contact Marcella Rose at 760-616-4953, or [mrose@mono.ca.gov](mailto:mrose@mono.ca.gov)

Respectfully submitted,

*Marcella Rose*

Marcella Rose, Sustainable Recreation Coordinator



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: County Administrative Office/Human Resources**

**TIME REQUIRED** 10 minutes

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

Christine Bouchard, Assistant County  
Administrative Officer

**SUBJECT** Workshop to Discuss Transition of  
the Department of Animal Services  
into the Division of Animal Services  
and Allocation List Amendment -  
Animal Services

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Workshop discussing CAO recommended transition of Department of Animal Services to the Division of Animal Services and the steps necessary to implement this change as directed by the Board. Approval of proposed resolution authorizing the County Administrative Officer to amend the County of Mono list of allocated positions to eliminate one Lead Animal Services Officer and add one Animal Services Manager to begin a critical recruitment.

**RECOMMENDED ACTION:**

Direct staff to return to the Board with the necessary documents to implement recommended reorganization of Animal Services. Adopt proposed resolution, authorizing the County Administrative Officer to amend the County of Mono list of allocated positions to eliminate one Lead Animal Services Officer and add one Animal Services Manager in the division of Animal Services.

**FISCAL IMPACT:**

The fiscal difference between the two positions will be funded through salary savings from the vacant Lead Animal Services Officer as well as additional vacant positions within the Animal Services Division.

**CONTACT NAME:** Christine Bouchard

**PHONE/EMAIL:** 7606164572 / cbouchard@co.mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Staff Report (SS)</a>
<a href="#">Resolution</a>

**History**

<b>Time</b>	<b>Who</b>	<b>Approval</b>
2/15/2024 5:03 PM	County Counsel	Yes
2/13/2024 12:59 PM	Finance	Yes
2/16/2024 10:15 AM	County Administrative Office	Yes



COUNTY ADMINISTRATIVE OFFICER  
COUNTY OF MONO  
Sandra Moberly, MPA, AICP

ASSISTANT COUNTY ADMINISTRATIVE OFFICER  
Christine Bouchard

To: Board of Supervisors

From: Christine Bouchard, Assistant County Administrative Officer

Date: February 6, 2024

Re: Staff Report – Workshop discussing CAO recommended transition of Department of Animal Services to the Division of Animal Services and the steps necessary implement this change as directed by the Board. Approval of Proposed resolution authorizing the County Administrative Officer to amend the County of Mono list of allocated positions to eliminate one Lead Animal Services Officer and add one Animal Services Manager to begin critical recruitment.

**.Strategic Plan Focus Area(s) Met**

- A Thriving Economy
- Safe and Healthy Communities
- Mandated Function
- Sustainable Public Lands
- Workforce & Operational Excellence

**Discussion**

The Animal Services Division has been without a manager for an extended time. Chris Mokrcek, Director of Emergency Management, has been acting as the Interim Animal Services Director. Director Mokrcek and the County Administrator’s Office have determined that the department needs a manager to oversee the day-to-day operations of Animal Services. The current allocation list includes a Lead Animal Services Officer. Staff has determined removing the Lead Animal Services position and replacing it with the Animal Services Manager position would improve the overall operations and provide direct oversight of the employees.

In addition, it is recommended that the County take required steps to convert what is currently the Animal Services Department into a Division of Animal Services, to be housed within another existing department (currently the County Administrator’s Office). Staff seeks direction from the Board today regarding returning with the necessary documents to formally effectuate that change.

**BOARD OF SUPERVISORS**

**CHAIR**

John Peters / District 4

**VICE CHAIR**

Lynda Salcido / District 5

Jennifer Kreitz / District 1

Rhonda Duggan / District 2

Bob Gardner / District 3

**COUNTY DEPARTMENTS**

**ASSESSOR**

Hon. Barry Beck

**DISTRICT ATTORNEY**

Hon. David Anderson

**SHERIFF / CORONER**

Hon. Ingrid Braun

**ANIMAL SERVICES**

Chris Mokrcek “Interim”

**BEHAVIORAL HEALTH**

Robin Roberts

**COMMUNITY DEVELOPMENT**

Wendy Sugimura

**COUNTY CLERK-RECORDER**

Queenie Barnard

**COUNTY COUNSEL**

Stacey Simon, Esq.

**ECONOMIC DEVELOPMENT**

Jeff Simpson

**EMERGENCY MEDICAL SERVICES**

Bryan Bullock

**FINANCE**

Janet Dutcher, DPA, MPA, CGFM, CPA

**HEALTH AND HUMAN SERVICES**

Kathryn Peterson

**INFORMATION TECHNOLOGY**

Mike Martinez

**PROBATION**

Karin Humiston

**PUBLIC WORKS**

Paul Roten



R24-\_\_

**A RESOLUTION OF THE MONO COUNTY  
BOARD OF SUPERVISORS AUTHORIZING THE COUNTY ADMINISTRATIVE  
OFFICER TO AMEND THE COUNTY OF MONO LIST OF ALLOCATED POSITIONS  
TO ELIMINATE ONE LEAD ANIMAL SERVICES OFFICER AND ADD ONE  
ANIMAL SERVICES MANAGER IN THE DIVISION OF ANIMAL SERVICES.**

**WHEREAS**, the County of Mono maintains a list of County job classifications, the pay ranges or rates for those job classifications, and the number of positions allocated by the Board of Supervisors for each of those job classifications on its List of Allocated Positions (or “Allocation List”); and

**WHEREAS**, the Allocation List identifies approved vacancies for recruitment and selection by Human Resources and implements collective bargaining agreements related to job classifications and pay rates; and

**WHEREAS**, the County seeks to provide public services in the most efficient and economical manner possible, which at times requires the modification of the job classifications on the Allocation List; and

**WHEREAS**, it is currently necessary to amend the Allocation List as part of maintaining proper accounting for hiring employees to perform public services;

**NOW, THEREFORE, THE BOARD OF SUPERVISORS OF THE COUNTY OF MONO RESOLVES** that the County Administrative Officer is authorized to amend the County of Mono List of Allocated Positions to reflect the following changes:

//

//

Reduce the allocation of one full-time permanent Animal Services Lead (new total 0) (salary range \$4,372 - \$5,314 per month).

Add the allocation of one full-time permanent Animal Services Manager (new total 1) (salary range \$5,727 - \$6,962 per month).

**PASSED, APPROVED, and ADOPTED** this \_\_\_\_\_ day of \_\_\_\_\_, 2024, by the following vote, to wit:

**AYES:**

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**NOES:**  
**ABSENT:**  
**ABSTAIN:**

---

John Peters, Chair  
Mono County Board of Supervisors

ATTEST:

APPROVED AS TO FORM:

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Clerk of the Board

---

County Counsel

## **ANIMAL SERVICES MANAGER**

### **DEFINITION**

Under general direction, administers and manages animal services operations. Manages animal services personnel; establishes and ensures implementation of shelter disease prevention strategies; ensures the humane treatment of animals within the shelter facilities; oversees the licensing, impounding, adoption, and euthanasia of animals; oversees the enforcement of State and County animal control laws; prepares and administers the department budget; identifies potential revenue sources; develops policies, procedures and long-range plans; serves as the primary spokesperson for the County's Animal Services Program; works collaboratively with partner organizations; develops and oversees programs designed to meet the needs of pet owners and the general public; performs related duties as required.

### **DISTINGUISHING CHARACTERISTICS**

Animal Control Manager is a single-position, mid-management classification in the Animal Services Department with overall responsibility for the County's animal services. This position is responsible for accomplishing and furthering department and County goals and objectives within general policy guidelines.

### **REPORTS TO**

Director of Emergency Management

### **CLASSIFICATIONS DIRECTLY SUPERVISED**

Animal Services Officers, Shelter Attendants, other administrative support staff, and volunteers.

### **EXAMPLES OF DUTIES**

Manages animal care and control operations, including a modern shelter facility; hires supervises, evaluates, and ensures proper training of Department staff; establishes and ensures implementation of shelter disease prevention and safety strategies, including quarantines and vaccinations; develops a protocol for ensuring the humane treatment of animals within the facility; oversees daily shelter operations to ensure the humane treatment of animals; coordinates work schedules and oversees on-call and emergency activities in accordance with negotiated labor agreements; oversees the licensing, impounding, adoption and euthanasia of animals; oversees livestock care and control activities; ensures the proper enforcement of State and County animal control laws; interprets, enforces and recommends

## **ANIMAL SERVICES MANGER**

changes in County animal ordinances; collaborates with local enforcement agencies to investigate animal cruelty; oversees the approval of officer reports, citations, and field logs; coordinates the development of improved electronic record-keeping systems; ensures the timely preparation and maintenance of State mandated animal control program records and statistics; prepares and administers the department budget; identifies and implements revenue-generating activities; prepares and administers grants; develops policies, procedures and long-range strategic plans; researches best practices employed by other animal care and control organizations and develops recommendations for change; prepares and presents oral and written reports; mediates complaints from the public; ensures the coordination of volunteer efforts; implements team-building strategies to support positive relations between and among staff and volunteers; works collaboratively with partner organizations to expand and improve animal care and control services to the public; develops and implements proactive public relations strategies; serves as the primary spokesperson for the County's Animal Services Program; responds to inquiries from the public, citizens groups, other agencies and County Officials; performs miscellaneous work in absence of Animal Services Officers - including cleaning kennels, performing euthanasia, assisting citizens, and processing licenses; performs other duties as assigned.

### **TYPICAL PHYSICAL REQUIREMENTS**

Sit for extended periods; frequently stand and walk; sufficient manual dexterity and eye-hand coordination to operate special animal handling equipment; sufficient stamina to exert extra physical effort for a substantial period of time; ability to climb, stoop, crouch and kneel; ability to walk on various types of terrain indoors and outdoors; lift and move objects weighing up to 100 pounds without assistance; may capture and restrain animals to assist officers, shelter attendants and the general public; corrected hearing and vision to normal range; verbal communication; use of office equipment including computers, telephones, calculators, copiers, and FAX.

### **TYPICAL WORKING CONDITIONS**

Work is performed in office, outdoor, driving, and animal shelter environments; work is performed in varying temperatures; exposure to animals with rabies and other diseases; exposure to dust, chemicals, and gases; frequent contact with staff and the public.

### **DESIRABLE QUALIFICATIONS**

#### Knowledge of:

- County and State ordinances and laws relating to the licensing, adoption, quarantine, impounding, care, and treatment of animals.
- Care and feeding of various breeds of dogs and cats and other domestic animals.
- Proper methods of cleaning, disinfecting and maintaining an animal shelter.
- Common diseases of animals, their symptoms and care.

## **ANIMAL SERVICES MANGER**

- Basic methods of animal collection and restraint.
- General law enforcement functions and procedures.
- Safe and efficient handling of large and small animals.
- Characteristics of animal behavior.
- Computers and software applications related to animal control work.
- Budget preparation and expenditure control.
- Strategic long-range planning techniques.
- Grant development and administration.
- Conflict resolution and team-building strategies.
- Public relations techniques.
- Principles of government administration, personnel management, employee supervision, and training.

### Ability to:

- Plan, organize, supervise, and manage the functions of the Animal Services Department.
- Formulate and implement countywide animal services and enforcement programs.
- Develop and administer the Department budget.
- Identify potential revenue sources and implement revenue-generating strategies.
- Obtain and administer grants.
- Establish and maintain cooperative working relationships.
- Manage human and animal behavior in crisis situations.
- Motivate and train employees.
- Research best practices and formulate recommendations for change.
- Develop both short and long-range operating plans.
- Work well under pressure and impending deadlines.
- Care for animals in the shelter including sick and injured animals.
- Read, interpret, and enforce animal control laws, ordinances, and regulations.
- Exercise good judgment in handling potentially hostile individuals and situations.
- Euthanize animals.
- Direct the preparation and prepare clear, concise handwritten and computer-generated reports and other necessary documents.
- Deal tactfully and courteously with the public when providing information and carrying out enforcement activities.
- Effectively speak and represent the County's animal services and enforcement functions with the public, community organizations, and other governmental agencies.
- Develop and implement public relations strategies.
- Respond to unexpected emergencies during and outside of normal operating hours.

Training and Experience: Any combination of training and experience which would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Four (4) year college degree in a related field (Business Administration, Public Administration, Animal Science, etc.); or

## **ANIMAL SERVICES MANGER**

Four (4) years' experience in animal control and enforcement and graduate of State Humane Officers Academy (or equivalent) or possession of an Animal Health Technician Certificate.

AND

At least three (3) years in a management or supervisory position related to animal care and/or animal control enforcement.

Successful experience with community partnerships is a must.

Special Requirements: Possession of, or ability to obtain, a valid 832 Peace Officer Standards and Training Certificate within one year of employment.

Possession of, or ability to obtain euthanasia training outlined in Section 2039 of the California Code of Regulations within six months of employment.

Willingness to receive pre-exposure rabies vaccination.

Possession of a valid California Driver's license issued by the California Department of Motor Vehicles.



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: Finance**

**TIME REQUIRED** 30 minutes

**PERSONS APPEARING BEFORE THE BOARD** Janet Dutcher, Director of Finance

**SUBJECT** Fiscal Year 2022-23 General Fund  
Fiscal Performance

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Presentation discussing analysis of trends, review of the County's General Fund (GF) fiscal performance for FY 2022-23 and concluding with information about the status of GF carryover and reserve balances.

**RECOMMENDED ACTION:**

None. Presentation and discussion only.

**FISCAL IMPACT:**

None.

**CONTACT NAME:** jdutcher@mono.ca.gov

**PHONE/EMAIL:** 760-932-5494 / jdutcher@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

Click to download
<a href="#">Staff Report</a>
<a href="#">GF 2023 Performance Presentation</a>
<a href="#">2022-23 GF Financial Report</a>

**History**

Time	Who	Approval
2/13/2024 10:01 AM	County Counsel	Yes
2/13/2024 4:24 PM	Finance	Yes

2/13/2024 7:34 PM

County Administrative Office

Yes



# DEPARTMENT OF FINANCE

## COUNTY OF MONO

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Kim Bunn  
Assistant Finance Director  
Auditor-Controller

Janet Dutcher, DPA, MPA, CGFM, CPA  
Director of Finance

Gerald Frank  
Assistant Finance Director  
Treasurer-Tax Collector

**Date:** February 20, 2024

**To:** Honorable Board of Supervisors

**From:** Janet Dutcher, Finance Director

**Subject:** General Fund fiscal performance for FY 2022-23, the status of carryover balance and fiscal reserves, and combined resources available for non-operating spending

This memo first provides a brief analysis of the General Fund's (GF) fiscal performance, including limited budget to actual comparisons, for the fiscal year ended June 30, 2023. Next, it provides the Board with information about the status of the GF carryover and our reserve balances. Finally, we summarize new non-recurring resources to allocate towards Board policy spending directives.

The County's GF performed better than expected, resulting in a higher spendable carryforward balance than we projected last year.

The Board adopted the FY 2022-23 budget on September 13, 2022, after the start of the fiscal year. Adding two and a half months to the schedule allowed the budget team to collect critical information unavailable until after June, expressly informing our revenue forecasts for property, sales, and transient occupancy taxes (TOT). These sources comprise nearly two-thirds of all GF revenues and almost 80% of GF discretionary resources. The additional information improved our estimating precision, conservatively maximizing revenue resources and allowing for greater flexibility to satisfy spending needs that might have otherwise gone unmet while structurally balancing the budget. **Actual GF revenues exceeded the amended budget by \$2,586,564, or 5.7% (unanticipated revenues).**

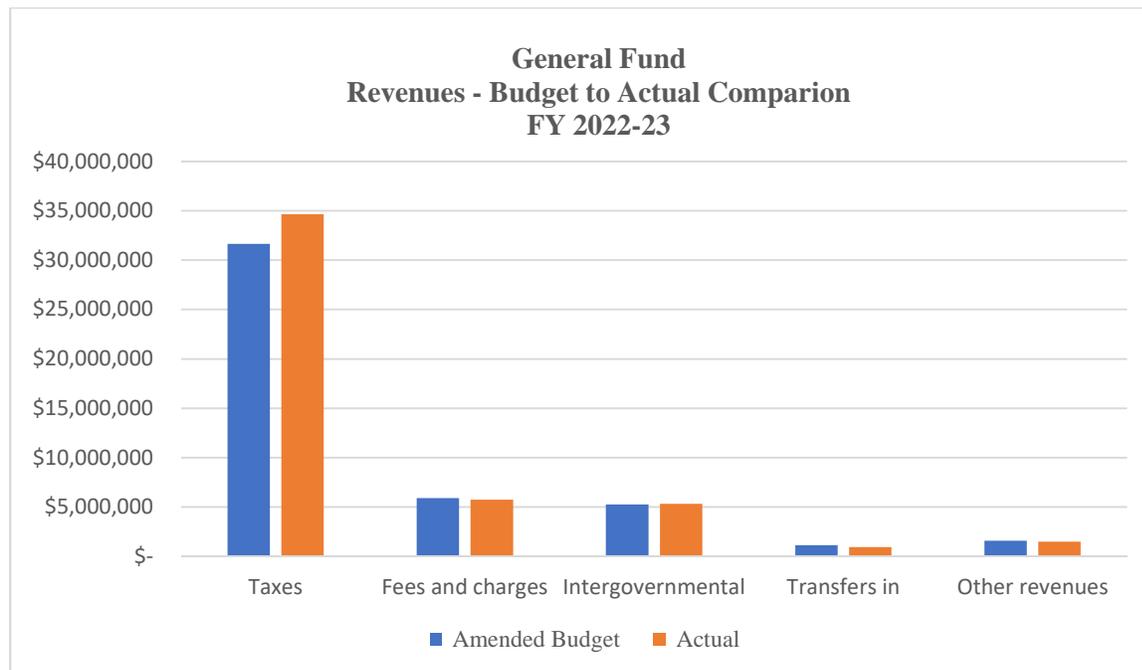
In the fiscal year 2022-23, the County reached its goal of a structurally balanced GF budget. While anticipated spending grew by 9.32%, or nearly \$3.9 million, forecasted revenue grew by a more significant margin of 12.58%, or \$5.1 million. Together, the combination closed the gap between revenues and appropriations. Interestingly, the goal to structurally balance ongoing spending against ongoing revenues should narrow the magnitude of unspent appropriations at the end of the fiscal year, primarily through expenditure pressure to spend within available resources. However, unspent appropriations in FY 2023 increased by \$410,179, or about 25% more than the amount from the previous fiscal year. **Overall, actual spending in FY 2023 was less than budget by \$2,067,552, or 4.6% (unspent appropriations).**

Unanticipated revenues plus unspent appropriations added \$4,654,116 to the GF carryover, and this amount is available to finance any future operating deficit (instead of drawing down economic reserves) or to pay for one-time spending items. The charts and graphs that follow present these results in more detail.

Below is the FY 2022-23 performance summary, comparing actual results against the amended budget:

	Adopted Budget	Amended Budget	Actual	Variance With Amended Budget	Prior Year Variance with Amended Budget
Total Revenues	\$45,346,241	\$45,562,779	\$48,149,343	\$2,586,564	\$3,461,812
Total Expenditures <sup>1</sup>	45,346,241	45,340,736	43,273,184	2,067,552	1,657,373
<b>Impact on GF Carryover Balance</b>	<b>\$--</b>	<b>\$(222,043)</b>	<b>\$4,876,159</b>	<b>\$4,654,116</b>	<b>\$5,119,185</b>

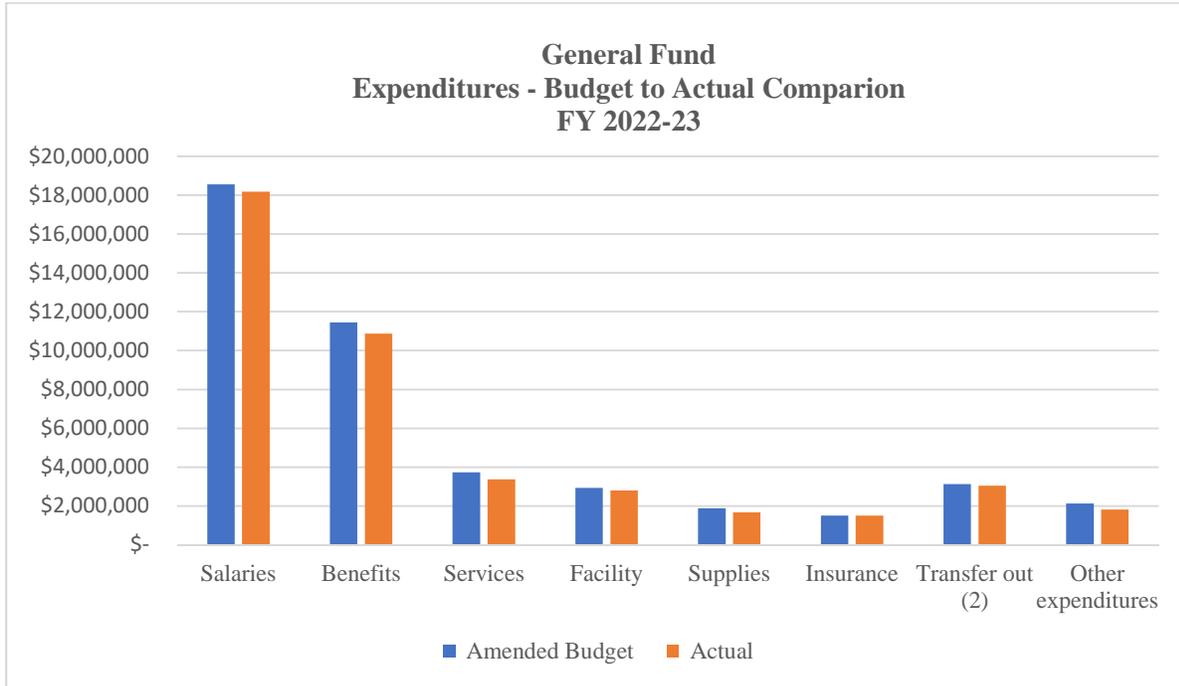
The chart below illustrates actual revenues against the amended budget for revenues by type. Unanticipated revenues (the gap between orange and blue bars) result primarily from underestimating taxes, as all other revenue classes align relatively with budget projections.



The following chart shows the budget to actual by expenditure category. Unlike the revenue comparison chart, unspent appropriations (the gap between the orange and blue bars) appear evenly distributed among all spending categories. However, vacancies (salary savings) and the

<sup>1</sup> Excludes post-adoption transfers of \$8,647,755 to appropriate GF carryover balance to one-time purposes.

resulting budget savings in benefits (primarily health care and pension) accounted for nearly half, or 45.67%, of the variance. In the services budget, 17.57%, or \$363,256, was unspent.



### General Fund Carryover Balance

The spendable balance of GF carryforward, the amount available for future spending, on June 30, 2023, is \$4,552,420, which is \$2,685,367, more than anticipated last year after using \$8,647,755 of the FY 2022 carryover for funding reserves and various one-time spending initiatives, and \$1,112,000 to cover the FY 2023-24 budget deficit. The schedule below compares and shows the changes in the GF carryforward balance.

	June 30, 2023	June 30, 2022
Beginning of the year carryforward	\$10,514,808	\$8,547,062
Surplus (deficit) from current year operations	5,576,159	3,967,746
Transfer to reserve accounts	(700,000)	(2,000,000)
One-time spending of FY 2022 carryforward:		
Reserves	(2,623,422)	<div style="border: 1px solid black; padding: 5px; display: inline-block;">\$8,647,755</div>
Pension pre-funding	(580,288)	
Special district loan program	(2,500,000)	
Jail capital project	(2,491,643)	
Local assistance project fund	(230,362)	
Airport subsidy	(32,603)	
Other capital projects	(189,437)	
End of the year carryforward	6,743,212	10,514,808
Non-spendable and other set-asides:		

<sup>2</sup> Excludes post-adoption transfers of \$8,647,755 to appropriate GF carryover balance to one-time purposes.

	June 30, 2023	June 30, 2022
CDBG and HOME long-term receivables	(887,327)	(887,327)
Prepaid expenses and inventory	(188,481)	(74,034)
FY 2023-24 budget deficit	(1,112,000)	--
<b>Spendable carryforward balance at the end of the year</b>	<b>\$4,555,404</b>	<b>\$9,553,447</b>

The County accumulated sufficient economic reserves based on FY 2022-23 spending levels. Government Finance Officers' Association recommends setting aside a minimum of two months of GF expenditures with higher amounts where more significant risks from the specifics of our local economy and revenue sources suggest a higher amount is a more prudent target. Mono County's goal has been 25% or three months of GF recurring expenditures. This amount increases to \$12,544,554 (using FY 2023-24 appropriations), and as of June 30, 2023, the County is \$1,207,554 short of this threshold, with details as shown below.

Economic Stabilization	\$8,590,228
General Reserve	2,746,772
Appropriate from GF carryover balance	1,207,554
<b>Combined GF Economic Reserves</b>	<b>\$12,544,554</b>

#### **Total Resources for Non-Recurring Project Costs (and future GF Budget Deficits)**

Assuming an affirmative decision to appropriate \$1,207,554 of the GF spendable carryover balance to economic reserves, the County would have additional uncommitted resources of \$3,347,850, provided no deficit exists for the FY 2024-25 budget, for financing non-recurring costs. For example, the County can appropriate the remaining balance of \$3,347,850 for one-time policy initiatives only if the FY 2024-25 GF budget is structurally balanced. The following table summarizes these financing sources.

Spendable carryforward balance on June 30, 2023	\$4,555,404
Less amount required to reach 25% reserve balance	(1,207,554)
<b>Total Resources Available</b>	<b>\$3,347,850</b>

Other committed reserves not included above, which have dedicated purposes, are listed below, along with the carryover fund balance on June 30, 2023.

- Cannabis Tax Fund: \$194,329
- Affordable Housing Fund: \$425,513 (excludes requested \$4 million transfer from Local Project Assistance Fund)
- Workforce Development Fund: \$246,219

Don't hesitate to contact me at 760-932-5494 or 775-301-8531 (cellphone) or by email at [jdutcher@mono.ca.gov](mailto:jdutcher@mono.ca.gov) if you have questions or need additional information.

# GENERAL FUND FISCAL PERFORMANCE REVIEW

*For the Fiscal Year Ended June 30, 2023*

# TODAY'S TOPICS

- GF Fiscal Performance – 2022/23
  - Summary Income Statement
  - Budget variances
  - Revenue trends
  - Expenditure trends
- Status of GF Carryover balance and GF Reserves

Key Performance Indicators ( <i>in Millions</i> )	2022	2023
Change in GF Cash Balance	\$3.1	(\$4.5)
Revenues less Expenditures (Net Income) <sup>1</sup>	\$3.9	\$5.6
Revenue Growth	\$2.3 or 5.6%	\$4.0 or 9.0%
Expenditure Growth	\$2.5 or 6.3%	\$3.0 or 7.5%
Budget Surplus <sup>1</sup>	\$5.1	\$4.7
Unanticipated Revenues ( <i>Actual Revenues less Budgeted Revenues</i> )	\$3.5	\$2.6 <sup>3</sup>
Unspent Appropriations ( <i>Amended Budget less Actual Spending</i> )	\$1.6	\$2.0
Spendable Fund Balance Carryover	\$9.6	\$4.6
Rainy Day Funds ( <i>Economic Stabilization and General Reserve</i> )	\$11.3	\$11.3
Available for One-Time Spending <sup>2</sup>	\$4.4	\$3.3

1 Excludes post-adoption transfers of \$9,347,755 for 2023, and \$2,000,000 for 2022.

2 Assumes FY 2024-25 is structurally balanced, and no portion of the one-time spending is needed to balance the budget.

3 Includes two years of excess ERAF allocations: \$1,498,850 for 2022 and \$1,287,950 for 2023. Previously, excess ERAF was recognized on year in arrears

<b>GF FISCAL PERFORMANCE 5 Years Actual Results</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>% Change 2022 to 2023</b>
Discretionary Revenue	\$28,584,000	\$30,778,000	\$33,062,000	\$35,367,000	\$38,953,000	10.14%
Program Revenue	8,331,000	7,996,000	8,801,000	8,841,000	9,196,000	4.02%
<b>TOTAL REVENUES</b>	<b>36,915,000</b>	<b>38,774,000</b>	<b>41,863,000</b>	<b>44,208,000</b>	<b>48,149,000</b>	<b>8.91%</b>
Salaries and Benefits	24,852,000	25,468,000	26,168,000	27,290,000	29,019,000	6.34%
Services and Supplies	10,033,000	9,402,000	8,771,000	9,345,000	10,428,000	11.59%
Capital outlay and Debt Service	208,000	164,000	165,000	30,000	73,000	143.33%
Contributions and Transfers	2,724,000	3,439,000	3,499,000	2,805,000	2,240,000	(20.14%)
Civic Center Rents	--	--	827,000	770,000	813,000	5.58%
<b>TOTAL EXPENDITURES</b>	<b>37,817,000</b>	<b>38,473,000</b>	<b>39,430,000</b>	<b>40,240,000</b>	<b>42,573,000</b>	<b>5.80%</b>
<b>NET CHANGE IN FUND BALANCE</b>						
Transfers to Reserves (and other one time purposes)	(902,000) (1,524,000)	301,000 (343,000)	3,090,000 (1,000,000)	3,968,000 (2,000,000)	5,376,000 (9,348,000)	35.48% 367.40%
FUND BALANCE, Beginning of Year	8,925,000	6,499,000	6,457,000	8,547,000	10,515,000	23.03%
FUND BALANCE, End of Year	\$6,499,000	\$6,457,000	\$8,547,000	\$10,515,000	\$6,743,000	(35.87%)

# Transfers to Reserves and One-time Spending

RESERVES	ECONOMIC STABILIZATION	\$3,123,422
PROGRAM	AFFORDABLE HOUSING	200,000
PROGRAM	SPECIAL DISTRICT LOANS	2,500,000
PROGRAM	LOCAL ASSISTANCE PROJECT FUND	230,362
CAPITAL	CIVIC CENTER	28,437
CAPITAL	JAIL REPLACEMENT	2,491,643
CAPITAL	CIVIC CENTER SECURITY	161,000
SUBSIDY	AIRPORT A87	32,603
RESERVES	PENSION STABILIZATION	580,288
	<b>TOTAL ON-TIME SPENDING</b>	<b>\$9,347,755</b>
	OPERATING BUDGET	\$700,000
	CARRYOVER FUND BALANCE	8,647,755
		<b>\$9,347,755</b>

<b>GF BUDGET TO ACTUAL PERFORMANCE FY 2022-23</b>	<b>FINAL BUDGET</b>	<b>ACTUAL</b>	<b>VARIANCE Positive (Negative)</b>	
Discretionary Revenue	\$36,013,000	\$38,953,000	\$2,940,000 <sup>1</sup>	
Program Revenue	9,550,000	9,196,000	(354,000)	
<b>TOTAL REVENUES</b>	<b>45,563,000</b>	<b>48,149,000</b>	<b>2,586,000</b>	<b>UNANTICIPATED REVENUES</b>
Salaries and Benefits	29,955,000	29,019,000 <sup>2</sup>	936,000	
Services and Supplies	11,347,000	10,428,000	919,000	
Capital outlay and Debt Service	168,000	73,000	95,000	
Contributions and Transfers	3,170,000	3,053,000	117,000	
Contingency	--	--	--	
<b>TOTAL EXPENDITURES</b>	<b>44,640,000</b>	<b>42,573,000</b>	<b>2,067,000</b>	<b>UNSPENT APPROPRIATIONS</b>
<b>NET CHANGE IN FUND BALANCE</b>	<b>923,000</b>	<b>5,576,000</b>	<b>4,653,000</b>	
Transfers to Reserves and other one-time spending	(9,348,000)	(9,348,000)	--	
<b>NET RESULTS FOR THE FISCAL YEAR</b>	<b>(\$8,425,000)</b>	<b>(\$3,772,000)</b>	<b>\$4,653,000</b>	

1 Includes two years of excess ERAF allocations: \$1,498,850 for 2022 and \$1,287,950 for 2023. Previously, excess ERAF was recognized on year in arrears

2 Includes \$1,200,000 transfer to the Pension Rate Stabilization Fund

# EXAMINING BUDGET VARIANCES

*FISCAL YEAR 2022-23*

# 2023 Final Budget to Actual – All GF Revenues

REVENUES	FINAL BUDGET	ACTUAL	VARIANCE	% OVER (UNDER) BUDGET
Property Taxes	\$24,295,000	\$25,118,000	\$823,000	3.39%
TOT	3,595,000	3,635,000	40,000	1.11%
Sales Taxes	653,000	921,000	268,000	41.04%
Excess ERAF	1,000,000	2,787,000 <sup>1</sup>	1,787,000	178.70%
All Other Revenues	16,020,000	15,688,000	(332,000)	(2.07%)
	<b>\$45,563,000</b>	<b>\$48,149,000</b>	<b>\$2,586,000</b>	<b>5.68%</b>

<sup>1</sup> Excess ERAF includes 2022 of \$1.5 million and 2023 of \$1.3 million

# 2023 Final Budget to Actual – Property Taxes

REVENUES	FINAL BUDGET	ACTUAL	VARIANCE	% OVER (UNDER) BUDGET	BUDGETING METHODOLOGY
Current Secured	\$21,165,000	\$21,352,000	\$187,000	0.88%	Assessor's Valuation, 1.75% delinquency rate
Current Unsecured	1,292,000	1,364,000	72,000	5.57%	Assessor's Valuation, 5% delinquency rate
Unitary	715,000	727,000	12,000	1.68%	State Roll, 3% delinquency rate
Supplemental	319,000	784,000	465,000	145.77%	7 year average @ 90%
Transfer Tax	321,000	297,000	(24,000)	(7.48%)	7 year average
Penalties/Interest	308,000	403,000	95,000	30.84%	7 year average @ 90%
Delinquent Collections	175,000	191,000	16,000	9.14%	7 year average @ 90%
	<b>\$24,295,000</b>	<b>\$25,118,000</b>	<b>\$823,000</b>	<b>3.39%</b>	

# 2023 Final Budget to Actual – TOT by Quarter (9% Discretionary, 2% EMS)

Quarter	Final Budget	Actual	Variance	% Over (Under) Budget
First Quarter – Sept 2022	\$1,597,000	\$1,612,000	\$15,000	0.94%
Second Quarter – Dec 2022	570,000	596,000	26,000	4.56%
Third Quarter – Mar 2023	483,000	476,000	(7,000)	(1.45%)
Fourth Quarter – Jun 2023	945,000	924,000	(21,000)	(2.22%)
Delinquency Collections	--	27,000	27,000	--
	<b>\$3,595,000</b>	<b>\$3,635,000</b>	<b>\$40,000</b>	<b>1.11%</b>

Excludes 1% of 12% allocated to Tourism (non-GF)

Forecasting method = linear regression using 11 years actuals with no contingency allowance

# 2023 Budget to Actual - Salaries

	Budget	Actual	Variance	% Under (Over) Budget
Final budget vs actual	\$16,645,000	\$16,192,000	\$453,000	2.72%
Net savings transferred to non-salary objects	128,000	--	128,000	
<b>Vacancies net of new positions and unanticipated salary changes</b>	<b>\$16,773,000</b>	<b>\$16,192,000</b>	<b>\$581,000</b>	<b>3.46%</b>

## COLAs Budgeted and Unanticipated

MCPE: 2% on 1/1/23, budgeted

DSA: 2% on 1/1/23, budgeted

CDSA: None

EMS: 3% on 1/1/23, budgeted

POA: 2% on 7/1/22, budgeted

At-Will: approx. 2.0% on 1/1/23, unbudgeted

<b>SALARY NET BUDGET SAVINGS (ADOPTED BUDGET – ACTUAL)</b>	<b>SAVINGS</b>
SHERIFF	253,000
PARAMEDICS	181,000
FACILITIES	87,000
PUBLIC WORKS (ENGINEERING)	87,000
COUNTY COUNSEL	62,000
ASSESSOR	49,000
ECONOMIC DEVELOPMENT	45,000
CAO	\$42,000
OTHERS	3,000
<b>Departments with positive budget variances with Adopted Budget</b>	<b>\$809,000</b>
<b>Departments with negative budget variances with Adopted Budget</b>	<b>(228,000)</b>
<b>NET BUDGET SAVINGS</b>	<b>\$581,000</b>

**SUMMARY OF COMPENSATION CHANGES  
AFFECTING THE ADOPTED BUDGET AND NOT  
INCORPORATED INTO THE BUDGET**

- Unanticipated COLAs
- Retirements / separations and payout of accrued balances
  - 27 employees
  - \$503,000 payout
- Out of Class – approximately \$46,000
- Severance - \$197,000
- FLSA not compensated with accrued balances
- Unplanned vacancies
- Underfilled positions
- Promotions and readjusted positions

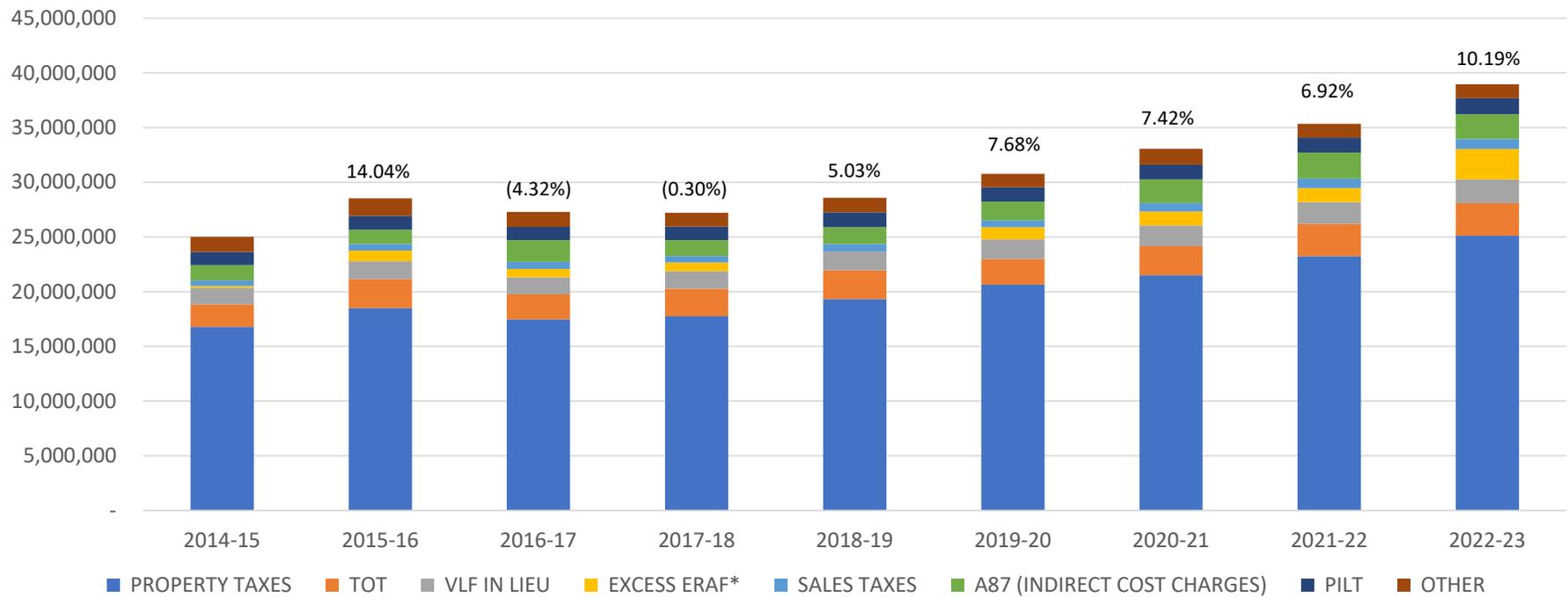
# 2023 BUDGET TO ACTUAL – EXPENDITURES FOR SERVICES

SERVICES OBJECTS	FINAL BUDGET	ACTUAL	VARIANCE WITH BUDGET	% VARIANCE TO FINAL BUDGET
COMMUNICATIONS	\$233,000	\$186,000	\$47,000	20.17%
CONSULTING	137,000	120,000	17,000	12.41%
CONTRACT SERVICES	1,982,000	1,807,000	175,000	8.83%
PROFESSIONAL SERVICES	524,000	451,000	73,000	13.93%
SPECIAL DEPARTMENT	449,000	435,000	14,000	3.12%
RECRUITING	90,000	66,000	24,000	26.67%
ALL OTHER OBJECTS	318,000	305,000	13,000	4.09%
	<b>\$3,733,000</b>	<b>\$3,370,000</b>	<b>\$363,000</b>	<b>9.72%</b>

# REVENUE TRENDS

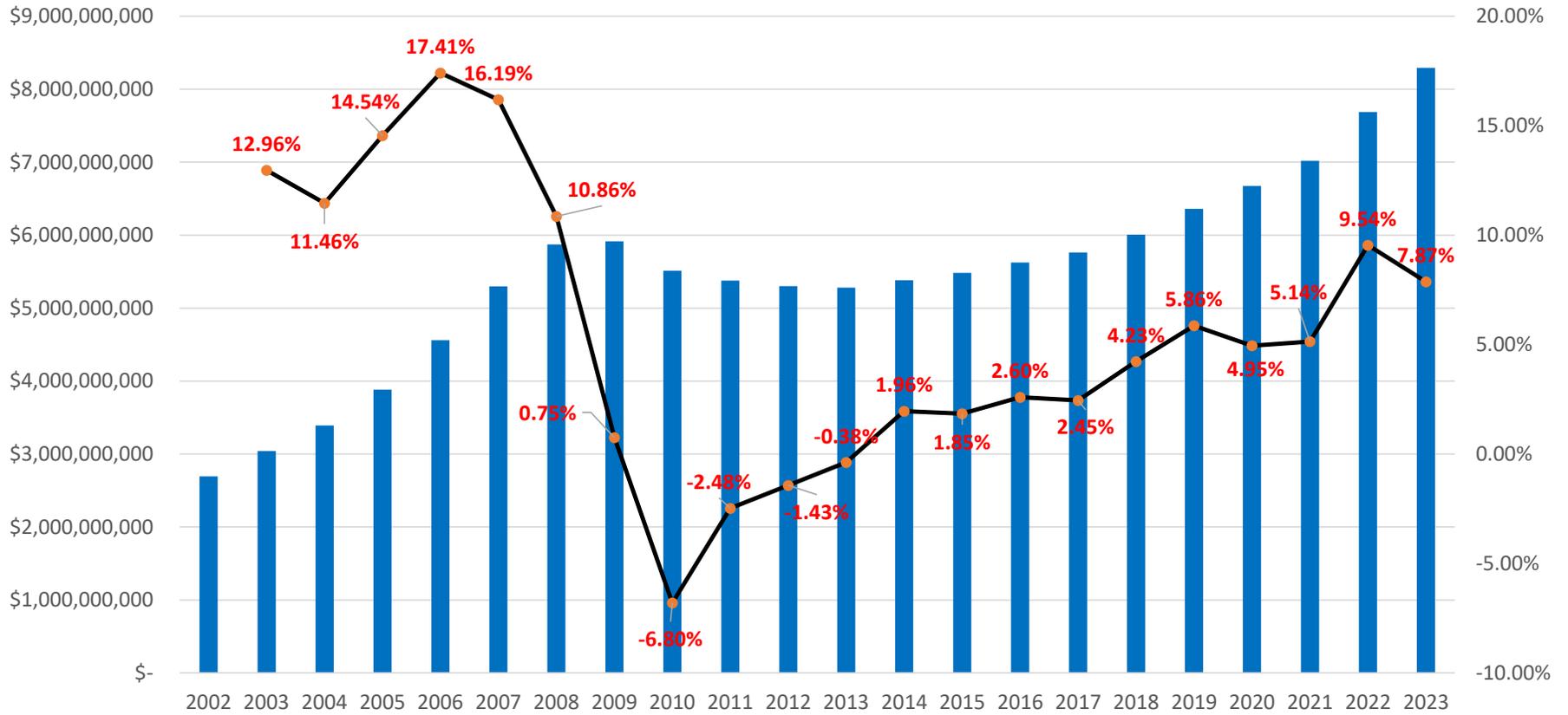
***FY 2022-23***

# DISCRETIONARY REVENUE GROWTH



\* Adjusted for change in accounting method (timing) in FY 2018-19 and FY 2022-23

# TOTAL PROPERTY TAX ROLL VALUE



Data based on certified assessment rolls from the Mono County Assessor, includes current secured, and unsecured values. Excludes unitary values

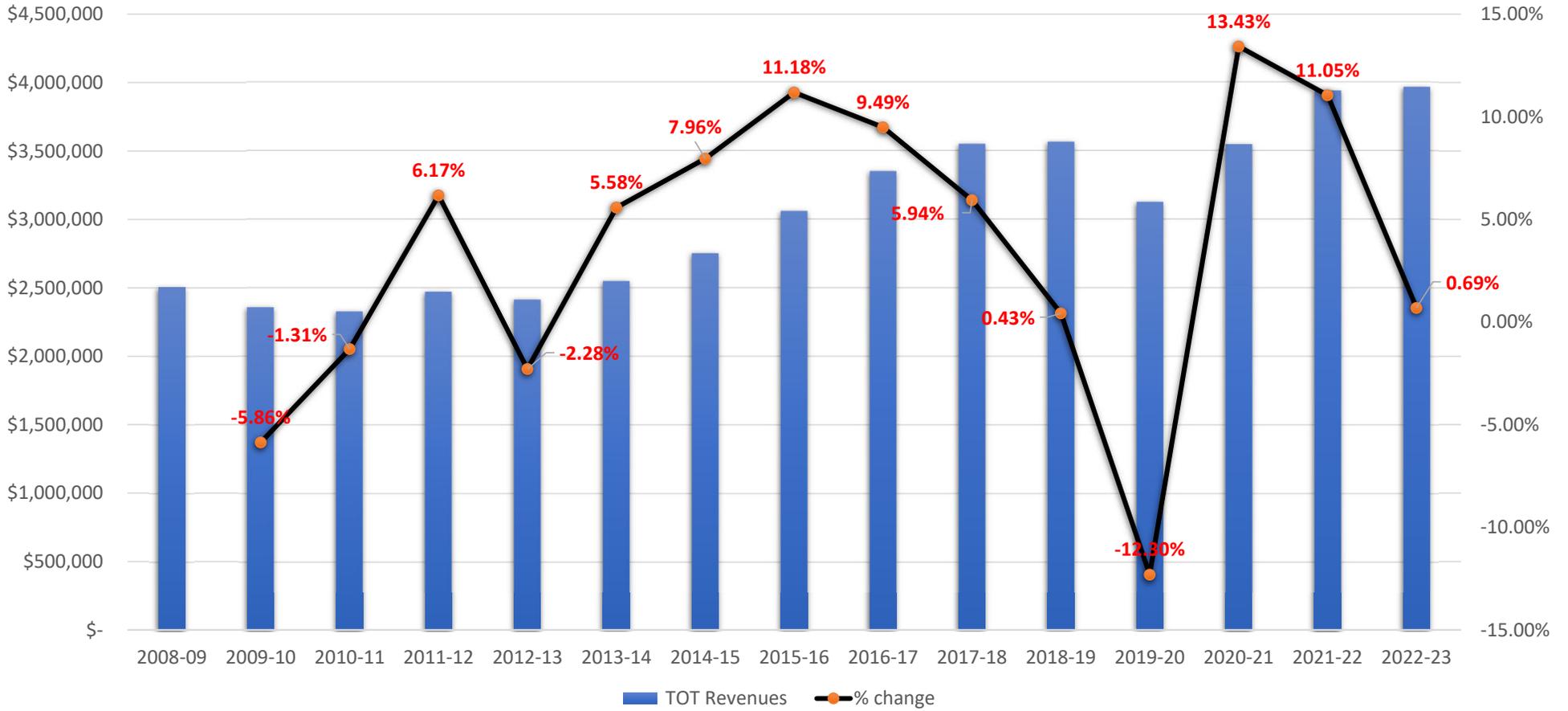
■ Total Roll Value    ● % Change

YEAR = LIEN DATE

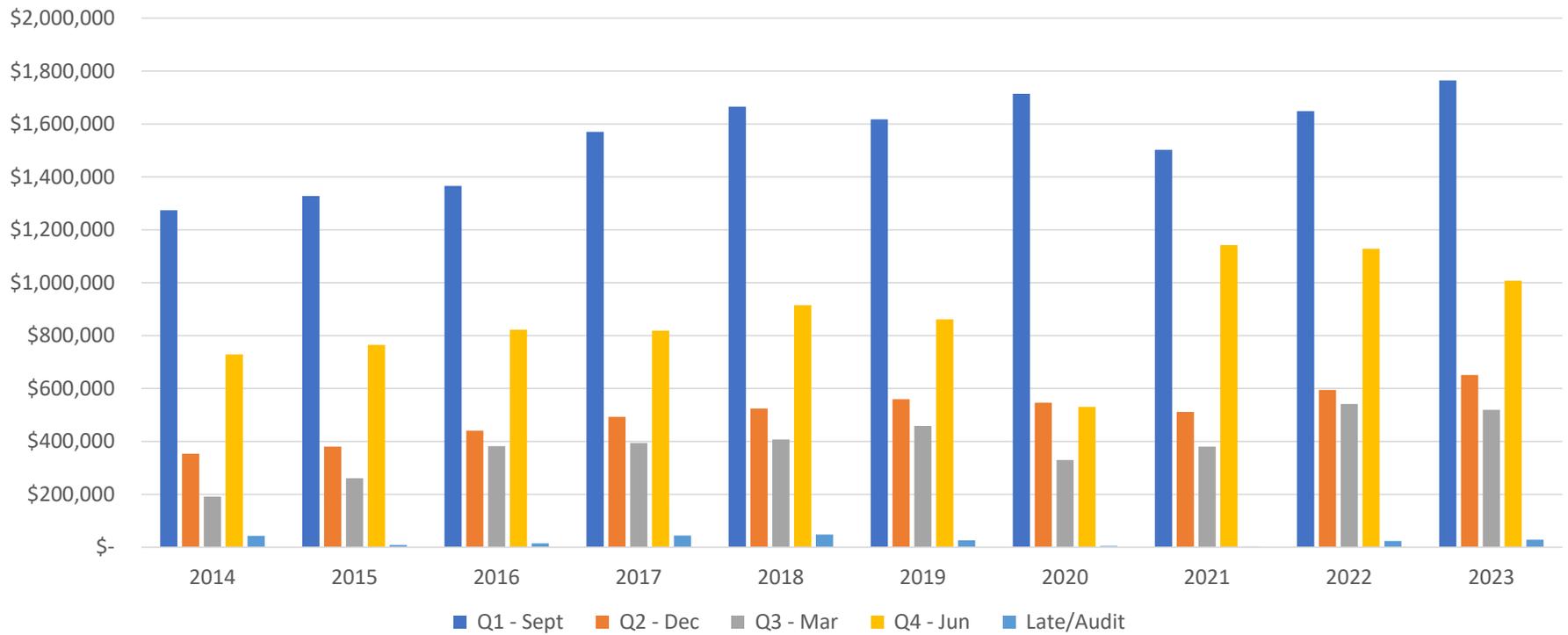
# 2021 to 2023 Assessment Changes

	2021 Roll FY 2021-22	2022 Roll FY 2022-23	2023 Roll FY 2023-24		\$\$ Change 2021 to 2022	\$\$ Change 2022 to 2023	%% Change 2021 to 2022	%% Change 2022 to 2023
Parcels	19,320	19,316	19,402		(4)	86		
Land	\$ 2,321,759,037	\$ 2,478,911,404	\$ 2,669,351,375		\$ 157,152,367	\$ 190,439,971	6.77%	7.68%
Improvements	4,642,093,101	5,130,935,087	5,541,585,821		488,841,986	410,650,734	10.53%	8.00%
Personal Property	118,404,933	138,871,194	148,816,595		20,466,261	9,945,401	17.28%	7.16%
Gross Value	7,082,257,071	7,748,717,685	8,359,753,791		666,460,614	611,036,106	9.41%	8.60%
Homeowners Exemption	(13,007,595)	(12,943,548)	(12,764,520)		64,047	179,028	-0.49%	-1.38%
Other Exemptions	(52,053,966)	(48,954,647)	(55,042,389)		3,099,319	(6,087,742)	-5.95%	12.44%
Net Value	\$ 7,017,195,510	\$ 7,686,819,490	\$ 8,291,946,882		\$ 669,623,980	\$ 605,127,392	9.54%	7.87%
1% Tax	\$ 70,172,000	\$ 76,868,000	\$ 82,919,000		\$ 6,696,000	\$ 6,051,000	8.71%	7.30%
County's GF Share (approx 30%)	\$ 21,199,000	\$ 23,222,000	\$ 25,050,000		\$ 2,023,000	\$ 1,828,000	8.71%	7.30%

## TRANSIENT OCCUPANCY TAX REVENUES



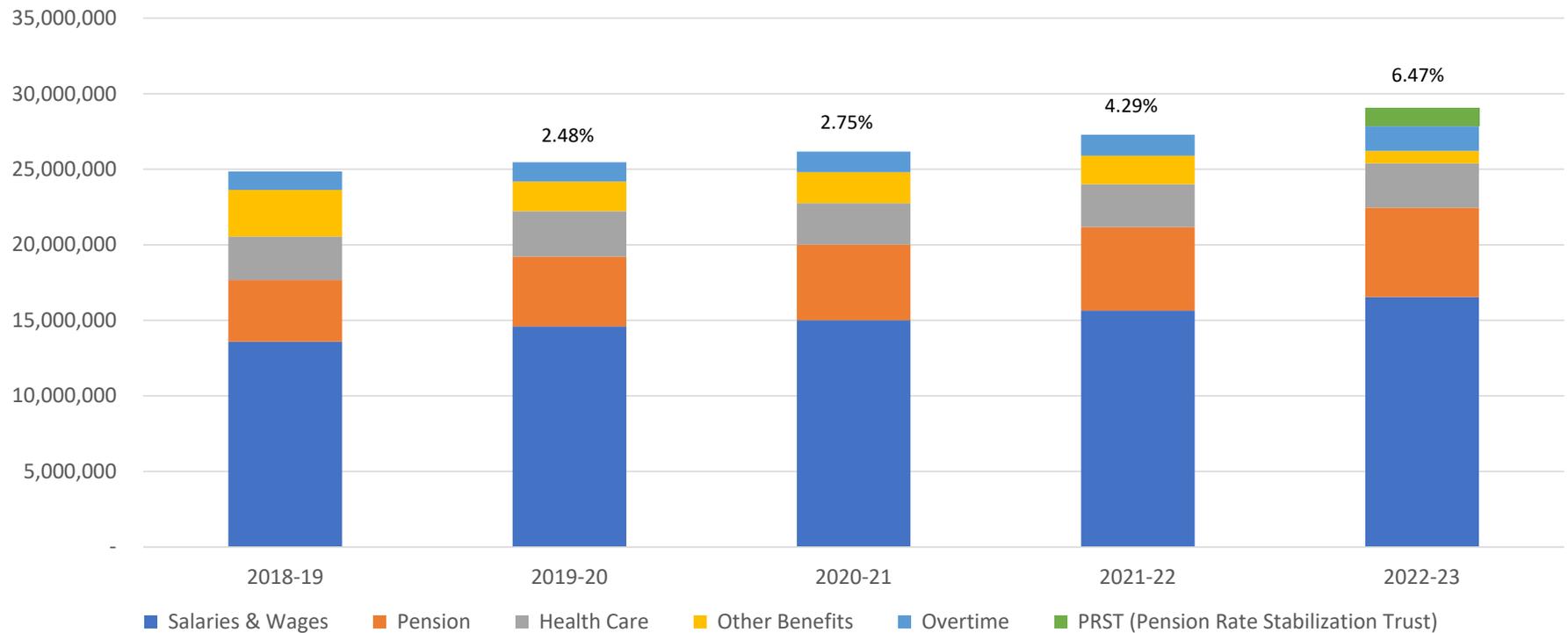
# TOT COLLECTIONS – by quarter



# EXPENDITURE TRENDS

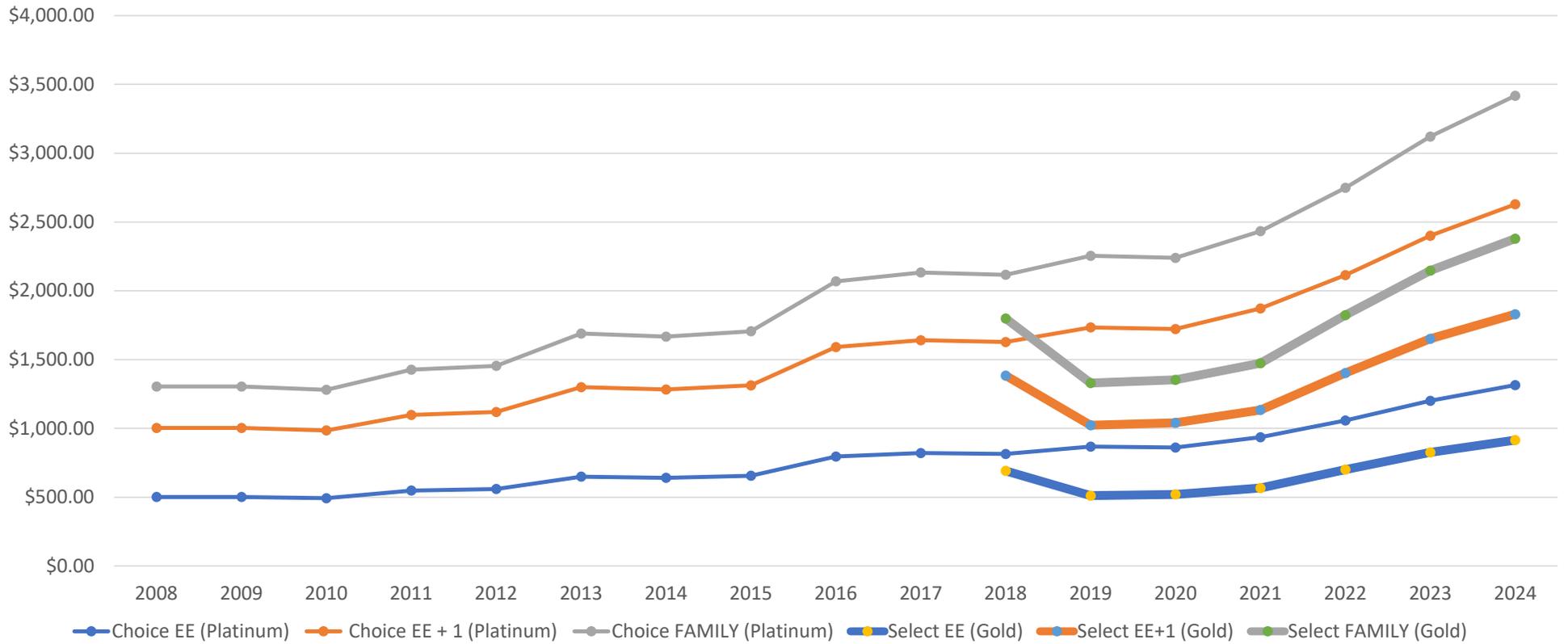
***FY 2022-23***

# SALARY AND BENEFIT GROWTH

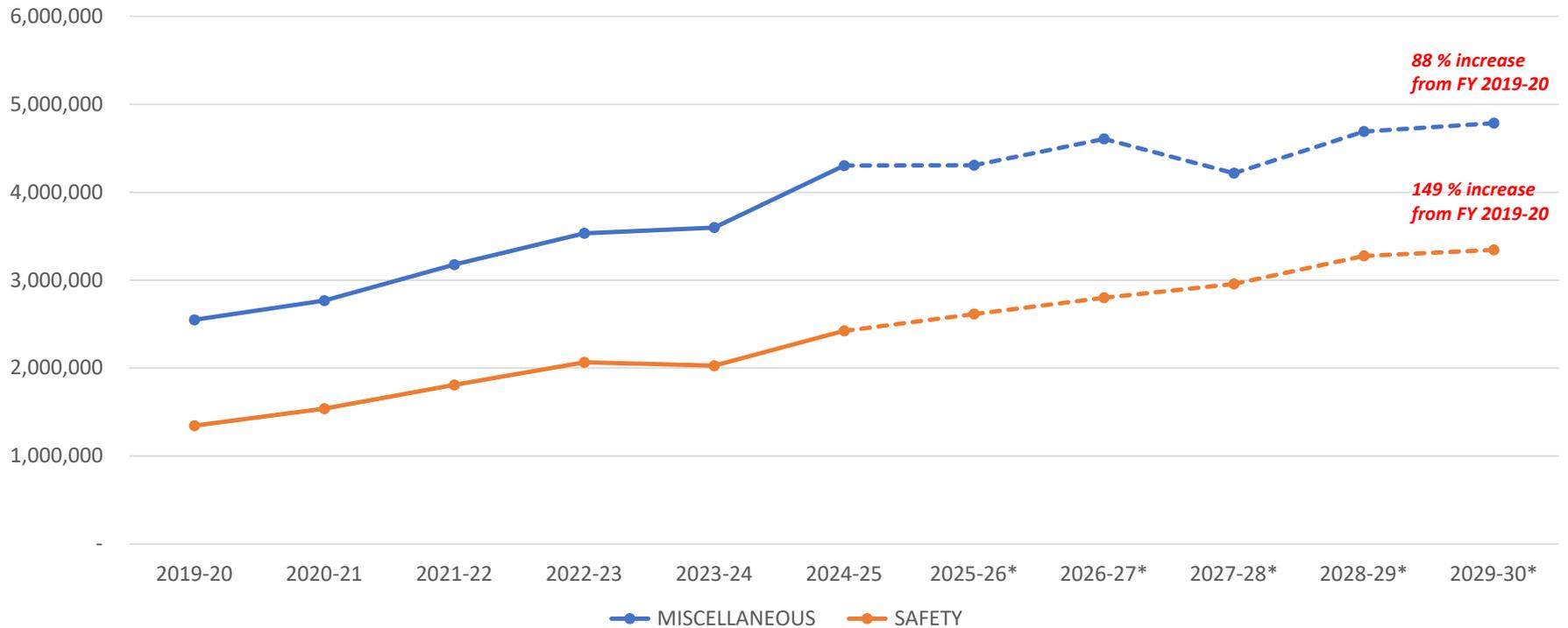


# ECONOMIC INDICATOR: HEALTH CARE PREMIUMS

PERS CHOICE (platinum) AND SELECT (gold) – RATES PER MONTH PER COVERAGE TIER

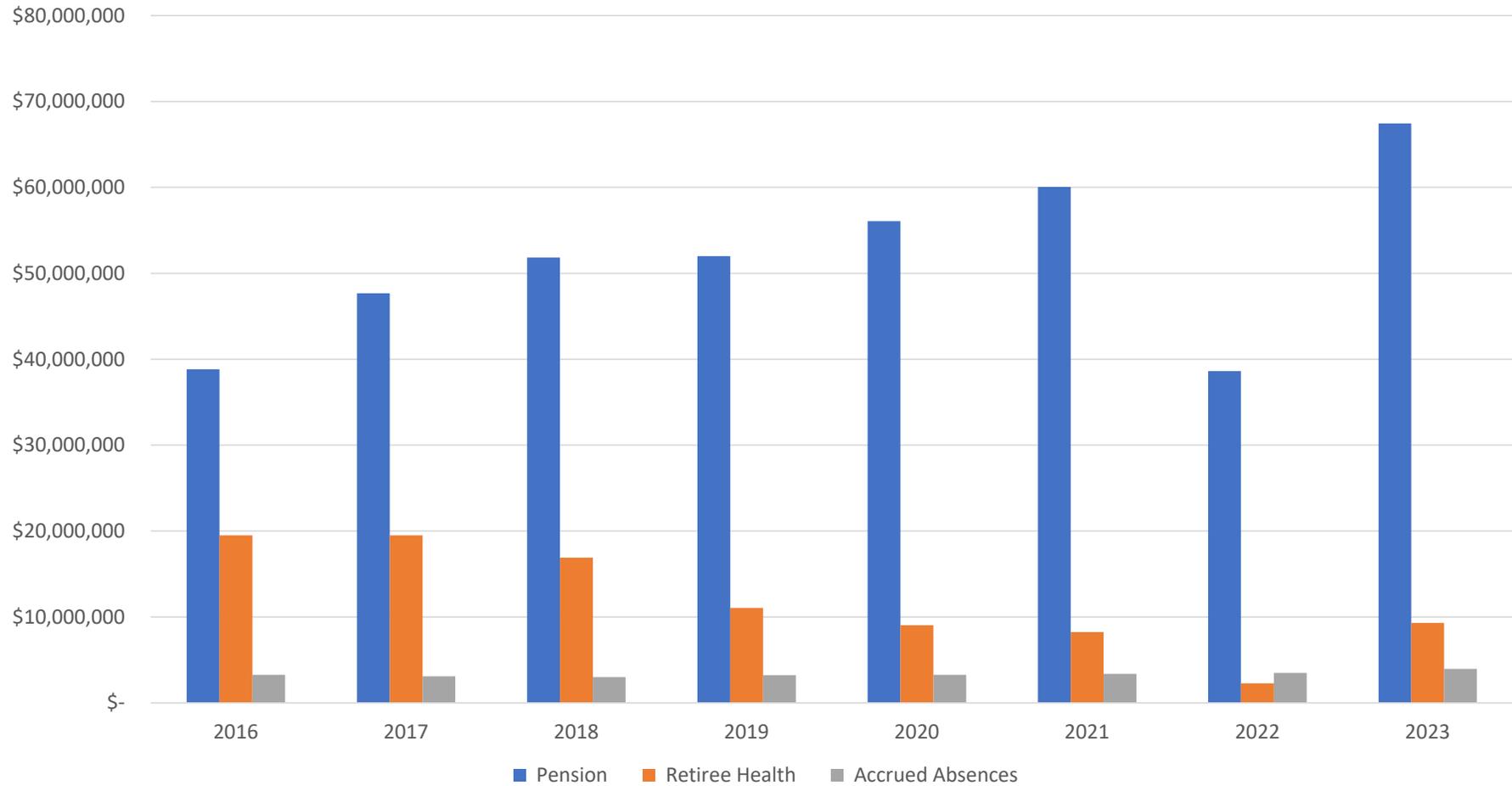


# PENSION UAL ANNUAL CONTRIBUTIONS – County Wide



\* Projected by CalPERS, included in FY 2024-25 Actuarial Valuations

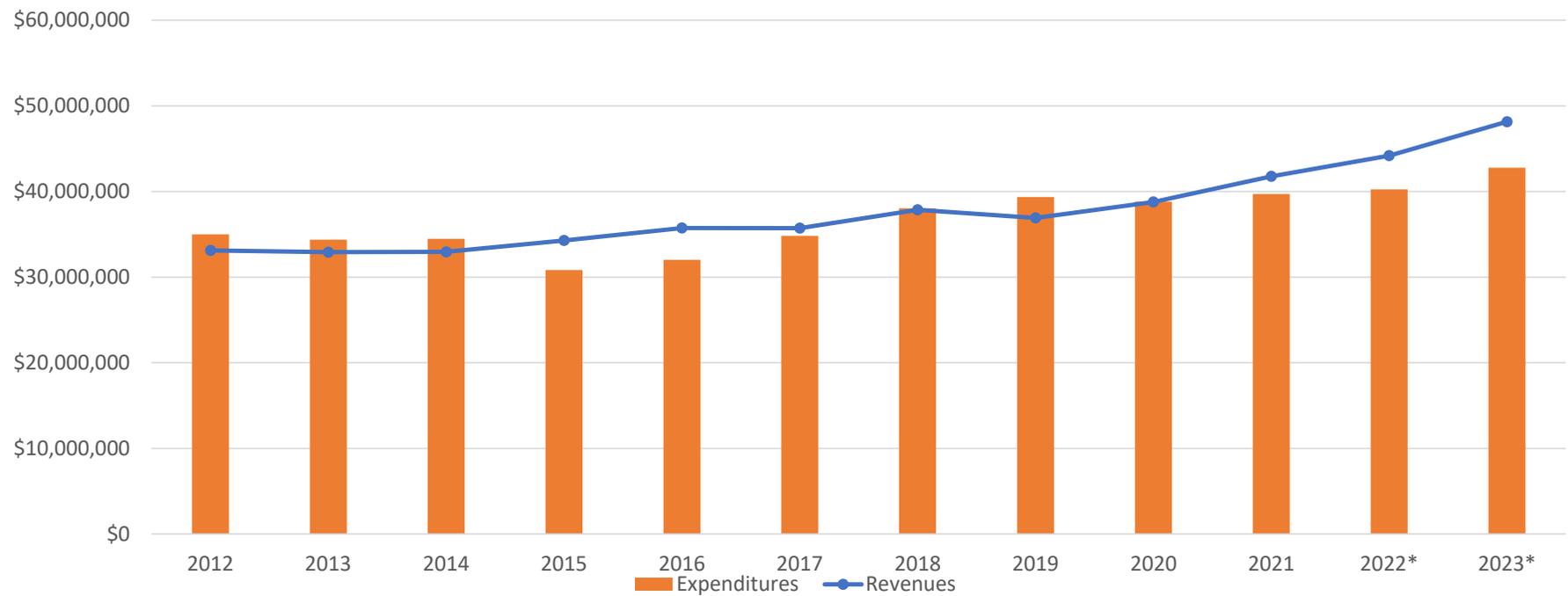
## COMBINED UNFUNDED OPERATING LIABILITIES – County Wide



\* Retiree Health not reported as County liability on Balance Sheet until FYE 2018  
 \*\* Retiree Health obligation estimated for FYE 2021

# GF FISCAL PERFORMANCE – 11 YEARS

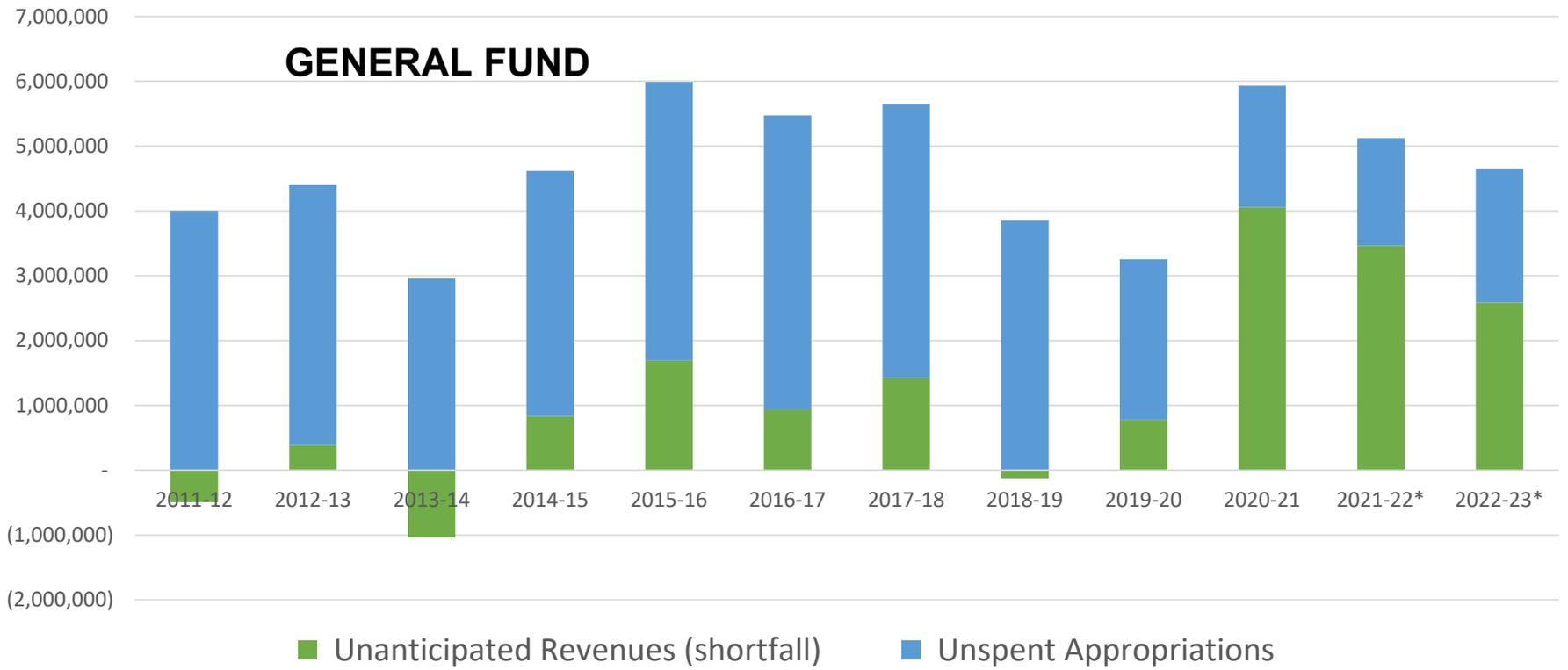
*Blue line above orange bars means surplus results for year*



- Excludes 2022 contribution of \$2 million to reserves and 2023 contribution to reserves and other one-time spending of \$9.3 million

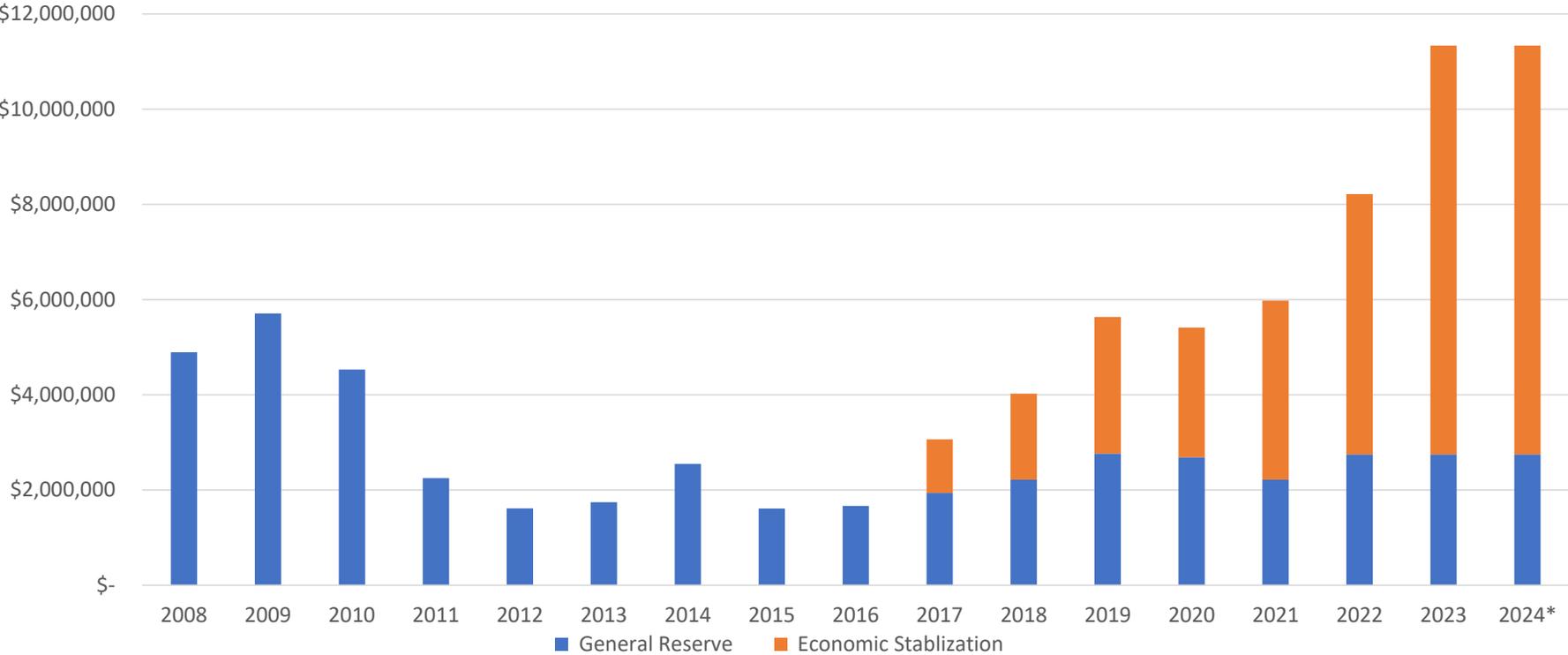
# *GENERAL FUND CARRYOVER*

# Budgetary Perspective of Carryover Fund Balance



\* Excludes 2022 contribution of \$2 million to reserves and 2023 contribution to reserves and one-time spending of \$9.3 million

# GF RESERVE BALANCES



*GFOA Recommended balances: 17% to 25% (\$8.5 to \$12.5 million)*

*County policy for general reserve: 5% to 15% (\$2.5 to \$7.5 million)*

*\* Projected*

# *GF Fund Balance Carryover As of June 30, 2023*

<b>GF FUND BALANCE CARRYOVER AVAILABLE FOR SPENDING</b>	
FUND BALANCE AT JUNE 30, 2023	\$6,743,000
SET-ASIDES (not available for spending):	
• CDBG and HOME Notes Receivable	887,000
• Prepaid expenses and inventory	189,000
• FY 2023-24 budget deficit	1,112,000
<b>REMAINING FUND BALANCE TO BALANCE FUTURE BUDGETS</b>	<b>\$4,555,000</b>
LESS: Amount needed to achieve 25% Economic Reserve balance	1,208,000
<b>MAXIMUM GF CARRYOVER AVAILABLE FOR NON-RECURRING PROJECTS</b>	<b>\$3,347,000</b>

## GENERAL FUND

### *Schedule of Carryover Balance*

Fund Balance, beginning of year at July 1, 2022	\$	10,514,808
FY 2022-23 Activity:		
Revenues		48,149,343
Operating Expenditures		(42,573,184)
One-time spending		(9,347,755)
		<hr/>
Fund Balance, end of year at June 30, 2023 before non-spendable		6,743,212
Less amounts not available for spending:		
CDBG / Home loans (30 year deferrals and subject to revolving)		(887,327)
Prepaid expenses		(187,215)
Inventory		(1,266)
Appropriated into FY 2023-2024 Budget		(1,112,000)
		<hr/>
Fund Balance, end of year at June 30, 2023 to balance future budgets	\$	<u>4,555,404</u>

### **RESERVE BALANCES AT JUNE 30, 2023**

General Reserve	\$	2,746,772
Economic Stabilization		8,590,228
		<hr/>

<b><i>TOTAL RESERVE BALANCES</i></b>	<b>\$</b>	<b><u>11,337,000</u></b>
<b><i>% of Total Spending (using FY 2023-24 appropriations)</i></b>		<b>22.59%</b>
<b><i>GFOA Recommendation</i></b>		<b>25.00%</b>

# General Fund

## Actual Performance

Fiscal Years Ended June 30, 2018 through 2022

	2018	2019	2020	2021	2022	2023
<b>REVENUES</b>						
Property Taxes	\$ 18,499,065	\$ 19,326,243	\$ 20,650,450	\$ 21,510,377	\$ 23,251,436	\$ 25,118,004
VLF in Lieu	1,628,456	1,697,102	1,796,382	1,885,020	1,981,722	2,170,449
Excess ERAF	972,145	-	1,103,211	1,273,212	1,279,951	2,786,841
Transient Occupancy Taxes	3,252,710	3,230,031	2,862,995	3,249,569	3,616,877	3,635,005
Sales Taxes	597,336	690,854	650,259	772,678	871,842	921,125
Intergovernmental	4,774,607	4,602,103	4,473,109	5,130,956	5,125,934	5,339,050
Charges for Services	3,160,412	3,413,248	3,354,303	3,571,865	3,434,707	3,478,737
A-87 Reimbursement	1,321,638	1,568,478	1,682,327	2,188,876	2,378,724	2,261,376
Other Revenues	2,098,451	1,445,802	1,379,422	1,532,063	1,469,499	1,484,180
Transfers In	1,557,084	941,271	821,217	748,181	796,870	954,576
<b>TOTAL REVENUES</b>	<b>37,861,904</b>	<b>36,915,132</b>	<b>38,773,675</b>	<b>41,862,797</b>	<b>44,207,562</b>	<b>48,149,343</b>
<i>annual % change</i>		<b>-2.50%</b>	<b>5.03%</b>	<b>7.97%</b>	<b>5.60%</b>	<b>8.92%</b>
<b>EXPENDITURES BY MAJOR OBJECT</b>						
Salary and Wages	13,350,496	13,589,859	14,602,278	15,011,518	15,648,966	16,542,422
Overtime	1,207,057	1,217,203	1,280,846	1,362,303	1,387,738	1,640,854
Benefits	9,727,468	10,045,473	9,585,103	9,793,882	10,253,125	10,872,571
Services	3,955,936	3,889,286	3,834,148	3,642,991	3,647,602	3,779,684
Facility	1,479,050	1,324,779	1,337,936	786,749	908,563	1,331,996
Insurance	1,403,739	1,629,987	1,449,787	1,475,100	1,477,328	1,511,366
Vehicle	1,447,760	1,480,094	1,168,955	1,149,631	1,434,416	1,679,536
Supplies	957,812	1,385,530	1,250,464	1,513,386	1,568,748	1,673,788
Training	383,262	322,716	360,547	202,896	308,198	414,101
Transfers Out	3,264,971	4,025,446	3,305,424	4,440,391	4,813,863	11,693,316
Support and Care of Others	465,133	222,434	476,633	387,416	761,314	708,111
Capital Outlay	263,173	91,993	2,256	6,411	29,955	73,194
Debt Service	129,333	116,347	161,693	-	-	-
<b>TOTAL EXPENDITURES</b>	<b>38,035,190</b>	<b>39,341,147</b>	<b>38,816,070</b>	<b>39,772,674</b>	<b>42,239,816</b>	<b>51,920,939</b>
<i>annual % change</i>		<b>3.43%</b>	<b>-1.33%</b>	<b>2.46%</b>	<b>6.20%</b>	<b>22.92%</b>
<b>CHANGE IN FUND BALANCE</b>	<b>(173,286)</b>	<b>(2,426,015)</b>	<b>(42,395)</b>	<b>2,090,123</b>	<b>1,967,746</b>	<b>(3,771,596)</b>
<b>BEGINNING FUND BALANCE</b>	<b>9,130,099</b>	<b>8,941,081</b>	<b>6,499,334</b>	<b>6,456,939</b>	<b>8,547,062</b>	<b>10,514,808</b>
<b>ENDING FUND BALANCE</b>	<b>\$ 8,941,081</b>	<b>\$ 6,499,334</b>	<b>\$ 6,456,939</b>	<b>\$ 8,547,062</b>	<b>\$ 10,514,808</b>	<b>\$ 6,743,212</b>

# General Fund

## Budget to Actual Comparison

Fiscal Year Ended June 30, 2022

	2023 Final Budget	2023 Actual	Variance Favorable (Unfavorable)	% Over (Under) Budget
<b>REVENUES</b>				
Property Taxes	\$ 24,294,759	\$ 25,118,004	\$ 823,245	3.39%
VLF in Lieu	2,097,866	2,170,449	72,583	3.46%
Excess ERAF	1,000,000	2,786,841	1,786,841	178.68%
Transient Occupancy Taxes	3,595,000	3,635,005	40,005	1.11%
Sales Taxes	653,000	921,125	268,125	41.06%
Intergovernmental	5,279,745	5,339,050	59,305	1.12%
Charges for Services	3,728,529	3,478,737	(249,792)	-6.70%
A-87 Reimbursement	2,175,745	2,261,376	85,631	3.94%
Other Revenues	1,587,356	1,484,180	(103,176)	-6.50%
Transfers In	1,150,779	954,576	(196,203)	-17.05%
<b>TOTAL REVENUES</b>	<b>45,562,779</b>	<b>48,149,343</b>	<b>2,586,564</b>	<b>5.68%</b>
<b>EXPENDITURES BY MAJOR OBJECT</b>				
Salary and Wages	17,045,970	16,542,422	503,548	2.95%
Overtime	1,504,526	1,640,854	(136,328)	-9.06%
Benefits	11,449,631	10,872,571	577,060	5.04%
Services	4,252,941	3,779,684	473,257	11.13%
Facility	1,506,279	1,331,996	174,283	11.57%
Insurance	1,513,644	1,511,366	2,278	0.15%
Vehicle	1,633,875	1,679,536	(45,661)	-2.79%
Supplies	1,891,193	1,673,788	217,405	11.50%
Training	503,632	414,101	89,531	17.78%
Transfers Out	11,782,610	11,693,316	89,294	0.76%
Support and Care of Others	737,700	708,111	29,589	4.01%
Capital Outlay	168,130	73,194	94,936	--
Contingency	(1,640)	-	(1,640)	100.00%
<b>TOTAL EXPENDITURES</b>	<b>53,988,491</b>	<b>51,920,939</b>	<b>2,067,552</b>	<b>3.83%</b>
<b>CHANGE IN FUND BALANCE</b>	<b>\$ (8,425,712)</b>	<b>\$ (3,771,596)</b>	<b>\$ 4,654,116</b>	<b>55.24%</b>

Total revenues	45,563,000	44,192,000	(1,371,000)
discretionary revenues	31,772,000	35,351,000	3,579,000
program revenues	13,791,000	8,841,000	(4,950,000)
total expenses	53,988,000	51,921,000	2,067,000
salaries and benefits	30,000,000	29,056,000	944,000
services and supplies	11,302,000	10,390,000	912,000
capital outlay and debt service	168,000	73,000	95,000
contributions and transfer	12,520,000	12,401,000	119,000
contingency	(2,000)	-	(2,000)
	53,988,000	51,920,000	2,068,000
Change in fund balance	(8,425,000)	(7,728,000)	696,000



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**Departments: CAO, Finance**

**TIME REQUIRED** 30 minutes

**PERSONS APPEARING BEFORE THE BOARD** Megan Chapman, Budget Officer

**SUBJECT** Fiscal Year 2023-24 Mid-Year Budget Review

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

Mid-year review of all department budget units revealed several Board level adjustments, but only three requesting use of contingency. The majority of the requested adjustments for your consideration are for newly awarded revenues and corresponding requested appropriations.

**RECOMMENDED ACTION:**

Approve recommended mid-year budget adjustments, as presented or as revised by the Board at the meeting (4/5th vote required).

**FISCAL IMPACT:**

Use of contingency in the amount of \$116,597 for three requested adjustments, leaving the FY 2023-24 contingency at \$589,677.

**CONTACT NAME:** Megan Chapman

**PHONE/EMAIL:** 760-924-1836 / mchapman@mono.ca.gov

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

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History

Time

Who

Approval

2/15/2024 4:57 PM	County Counsel	Yes
2/14/2024 9:44 AM	Finance	No
2/14/2024 10:00 AM	County Administrative Office	Yes
2/15/2024 4:57 PM	County Counsel	Yes
2/14/2024 10:26 AM	Finance	Yes
2/16/2024 10:12 AM	County Administrative Office	Yes



COUNTY ADMINISTRATIVE OFFICER  
COUNTY OF MONO  
Sandra Moberly, MPA, AICP

ASSISTANT COUNTY ADMINISTRATIVE OFFICER  
Christine Bouchard

February 20, 2024

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Kathryn Peterson

INFORMATION

TECHNOLOGY

Mike Martinez

PROBATION

Karin Humiston

PUBLIC WORKS

Paul Roten

To: Mono County Board of Supervisors

From: Megan Chapman, Budget Officer

RE: FY 2023-24 Mid-year Budget Review

**Strategic Plan Focus Area(s) Met**

A Thriving Economy  Safe and Healthy Communities  Mandated Function

Sustainable Public Lands  Workforce & Operational Excellence

**Recommended Action:**

Consider a motion to approve recommended mid-year budget adjustments, as presented or amended (4/5th vote required).

**Background:**

In accordance with Government Code Section 29000 et. al., known as the County Budget Act, Mono County adopted the Recommended Budget on September 12th, 2023, after a public hearing held on August 10th that was continued to August 15th. This was the second budget adopted since restoring responsibility for budget development and management to the County Administrative Officer's (CAO) office. This transition of budget development from the Finance office to the CAO office has been challenging due to changing leadership, however we are establishing roles and responsibilities amongst the central budget team and implementing policy and process that will serve Mono County now and into the future.

The 2023-24 Adopted budget was for \$129,726,147 in expenditures, offset by \$116,151,134 in revenue and \$13,575,012 in fund balance. Of the adopted budget the general fund portion is \$50,178,995 in expenditures, offset by \$49,066,215 in revenue and \$1,112,000 in fund balance.

This year's budget is unique because it includes allocation of one-time funds from Local Assistance Tribal Consistency and the American Rescue Plan Act based on the budget workshop held on May 1<sup>st</sup> 2023. The one-time funds have allowed for allocation of resources towards Deferred Maintenance/Capital Replacement, Strategic Priorities, and new Capital improvements.

**Current Economic Climate:**

Inflation has decreased since the mid-2022 peak but is still above pre-pandemic levels. Short-

term inflation has declined, but core inflation is still above 3%. Prices have grown by 19% overall since 2020. Last year, California was faced with a significant challenge of a \$22.5 billion deficit which increased to a \$31.5 billion deficit by May before the legislature adopted the Final Budget with revenues above expenditures to create fund balance of \$8,081 million. The anticipated deficit for FY 2024-25 was \$14 billion, but the State budget position has worsened. The State budget outlook is bleak, largely due to a severe revenue decline in 2022-23 attributed to the decline in the stock market and California's tax structure which is highly dependent on capital gains revenues and a delay in income tax collections because of weather-imposed emergency declarations. The State Legislative Analyst's Office (LAO) announced their estimate of the state deficit at \$68 Billion that has been reduced to \$58 billion by using budget deficit reduction tactics. Meanwhile, the State Administration's version of the forecast was for a \$43 billion deficit, which has decreased to a \$38 billion shortfall using similar tactics. The Governor's plan to reduce the deficit include: drawing on reserves, reducing spending, increasing revenue, delaying program expenditures, shifting expenditures from the general fund to other funds, and deferring costs. Although there are tools to address the "budget problem" in the short term, the projection is for multi-year deficits through 2027-28.

Locally, we are dependent on state and federal revenues for approximately \$43 million or 33% of the total Mono County budget to finance critical public safety, health, and public assistance programs. Additionally, the County is dependent on the State to reimburse us for our insufficient Vehicle License Fees, which is a constitutionally established state obligation. The General Fund is less impacted by state level deficits because of a stable local economy. Local taxes make up the next largest portion of our revenues at \$35 million or 27%. The County general fund is composed of approximately \$30 million in Property taxes, \$3.6 million in Transient Occupancy Tax and \$6.4 million in charges for services. Property tax revenue has increased for eleven consecutive years, and we expect this level of growth to continue, although likely at a lesser rate than previously experienced. The assessment roll for last year in the FY2023-24 budget was almost an 8% increase. The Assessor's office is not projecting the same growth in FY 2024-25. Information is not available at this time to know what growth in assessed value might be realized to support spending in the FY 2024-25 budget.

**FY 2023-24 Budget update & requested budget adjustments:**

Mono County is tracking within normal range for this time of year for both revenues and expenditures, with year-to-date revenues received of nearly \$60 million of the \$117.2 budgeted and year-to-date expenditures of \$55 million of \$129.7 budgeted.

The below table shows the Adopted 2023-24 Budget, the Amended 2023-24 Budget, the Year-to-Date Actuals as of the end of January as well as Remaining budget and % of Remaining Budget for use through June 30, 2024.

	<b>2023-24 Adopted Budget</b>	<b>2023-24 Amended Budget</b>	<b>2023-24 Actual</b>	<b>Remaining Budget</b>	<b>Remaining Budget %</b>
Revenues					
Intergovernmental	\$43,546,051	\$44,452,205	\$21,607,567	\$22,844,638	51.39%
Taxes	\$34,981,413	\$34,981,413	\$23,790,627	\$11,190,786	31.99%
Transfers In	\$17,728,419	\$17,944,714	\$2,833,533	\$15,111,181	84.21%
Charges for Services	\$13,976,988	\$13,926,988	\$7,389,712	\$6,537,276	46.94%
Miscellaneous Revenues	\$2,942,334	\$2,942,334	\$2,892,817	\$49,517	1.68%
Interest & Rents	\$933,623	\$933,623	\$745,713	\$187,910	20.13%
Licenses, Permits & Franchises	\$828,206	\$805,151	\$458,771	\$346,380	43.02%
Fines, Forfeitures & Penalties	\$859,100	\$859,100	\$206,006	\$653,094	76.02%
Other	\$355,000	\$355,000	\$0	\$355,000	100.00%
<b>Total Revenues</b>	<b>\$116,151,134</b>	<b>\$117,200,528</b>	<b>\$59,924,745</b>	<b>\$57,275,783</b>	<b>48.87%</b>
Expenses					
Salaries & Benefits	\$50,246,136	\$50,279,416	\$25,436,357	\$24,843,059	49.41%
Services & Supplies	\$36,793,485	\$36,743,818	\$16,738,827	\$20,004,991	54.44%
Capital Outlay	\$18,025,011	\$19,407,859	\$6,924,131	\$12,483,728	64.32%
Transfers Out	\$17,731,082	\$17,890,709	\$3,333,533	\$14,557,176	81.37%
Support of Other	\$3,865,220	\$3,865,220	\$1,809,200	\$2,056,020	53.19%
Debt Service	\$2,104,199	\$2,104,199	\$1,186,656	\$917,543	43.61%
Contingency	\$849,514	\$706,274	\$0	\$706,274	100.00%
Other Expenses	\$50,000	\$50,000	\$0	\$50,000	100.00%
<b>Total Expenses</b>	<b>\$129,726,147</b>	<b>\$131,108,995</b>	<b>\$55,428,651</b>	<b>\$75,680,344</b>	<b>57.72%</b>

Since adopting the FY 2023-24 Budget there have been three budget adjustments increasing total appropriations by \$1,382,848. These adjustments include:

1. The inclusion of pre-development work for the Eastern Sierra Climate and Communities Resilience Project to restore forest health and reduce the risk of wildfire around the Town of Mammoth Lakes. This includes a grant program with the Forest Service (\$299,608) and collaborative work agreement with Eastern Sierra Council of Government (\$250,506) as well as in-kind County contribution of \$50,213 for a joint project for predevelopment work on a Biomass facility.
2. The collaborative funding for implementation of the CRIS radio system with the Town of Mammoth Lakes (\$272,837) and Mammoth Lakes Fire District (\$83,203) and use of Mono County Contingency (\$143,240).
3. The inclusion of Capital Equipment construction County Fleet purchases of \$333,454 budgeted in FY 2022-23 that were not delivered by June 30, 2023.

**FY 2023-24 Mid-year Budget process:**

The County CAO's office distributed Mid-year budget instructions to all departments on November 30<sup>th</sup> 2024, requesting all budget adjustments be submitted by January 10<sup>th</sup> 2024 for review and approval before routing to the Board for

consideration on February 20th. This began both the department and administrative review of all department budget units. All requested adjustments were reviewed by the County's central budget team. Those departments requesting board level adjustments met with members of the CAO's office to discuss the requested adjustments before including them as part of this Mid-year report for consideration today. Mid-year review of all department budget units revealed several Board level adjustments, but only three requesting use of contingency. The majority of the requested adjustments for your consideration are for newly awarded revenues and corresponding requested appropriations. All of the below requested adjustments are for appropriation increases that are offset by new revenues or use of adequate fund balance:

#### Behavioral Health

1. Behavioral Health (120-41-840) is requesting an increase in appropriations of \$25,000 for an emergency mental health service contract with Bakersfield Behavioral Health to be paid for with 2011 Realignment.
2. The Behavioral Health Drug and Alcohol program (120-41-845) is requesting an increase in revenue from 2011 Realignment of \$947,332. The majority of this requested transfer is to pay for prior year's Drug and Alcohol qualified services as well as payment from County Probation department for any court ordered Behavioral Health Services up to \$65,000 as needed.
3. Behavioral Health is requesting an increase in the Mental Health Services Act (121-41-841) appropriations of \$270,020 from Fund balance: \$139,000 for Interoperability Solution contract, a technology solution that allows us to meet California Advancing and Innovating Medi-Cal payment reform requirement; \$65,000 for furnishings of the Sawyer Integrity housing project; and \$57,168 in contract services for data archiving and education for clinical staff. There is also an inclusion of small adjustments for copier pool and snow removal.
4. Behavioral Health Realignment (122-41-840) is requesting an increase in Operating Transfers out to fund the Emergency Mental Health service as well as Drug and Alcohol program listed above.

#### County Administration

5. Office of Emergency Management is requesting an increase in revenue of \$87,762 and corresponding expenditures for the Homeland Security Grant (142-22-440) for various security measures including terrorism attacks, cyber security, portable radios and data devices.
6. As per Board item on February 5<sup>th</sup> the \$3 million is being transferred into the Affordable Housing fund for the following: \$600,000 for Access Apartments, \$1.25 million for the purchase of five units in Bridgeport, \$327,826 to meet the PLHA funds and the remaining balance in potential Capital thorough June 30, 2024.
7. One- time funds held in Fund 194 includes a request to transfer \$3 million into the Affordable housing fund.

#### District Attorney

8. District Attorney (100-21-430) and Victim Witness (100-56-433) budget units were both adjusted to reflect a percentage change in salary and benefits for two staff based on time allocations. This change will more accurately reflect job duties spent on associated workload in appropriate budget units and has no NET change.

#### Economic Development

9. Tourism (105-19-191) received unanticipated revenue of \$5,000 due to a contracted company not providing Mono County with deliverables of accurate visitor data and the department would like to appropriate these funds for alternative filming support and filming marketing opportunities in FY 2023-24.

#### Finance

10. Copier pool (655-10-305) needs to increase the appropriations for copy machine purchases by \$4,000 for cost increases. This increase will be paid for from fund balance of \$133,803.

#### Health and Human Services

11. The state notified the Health and Human Services department of carry forward funding approval in December 2023. This resulted in a request to increase the appropriations for the Emergency Preparedness budget unit (133-41-860) by \$23,555 for corresponding contract services and Special department expense for executing the state Center for Preparedness and Response program for Hospital Preparedness and Public Health Emergency Preparedness.

#### Probation

12. Probation Public Health and Safety Grant (184-23-520) was awarded the Proposition 64 Public Health and Safety Grant for a collaborative project with the Mammoth High School for the Mammoth High School Public Safety Program. The total award is \$2,767,916 of which staff is requesting to spend \$759,873 in this fiscal year. Any funds not spent will be rolled into the following fiscal year.
13. Probation has requested an increase in \$65,000 for transfer out of the Community Corrections Partnership (CCP) budget unit 680-23-520 for any court ordered Behavioral Health services. This is a newly agreed to arrangement between Mono County Behavioral Health and Probation CCP committee.
14. The Probation department has requested an increase in appropriations for Tyler Supervision Case Management System to be paid for by the Youth Offender Block Grant (YOBG) and Senate Bill 678 funding (split 30% and 70% respectively amongst the two funds). There is an adequate fund balance to cover this contract with fund balance of over \$500,000 in fund 681 and \$1 million in fund 678.

15. The Probation department received an extension for the drug court grant. The requested adjustment for the Drug Court Budget Unit is to increase revenue and expenditures by \$125,000 for applicable cases. Any unused funds will be included in FY2024-25 Budget.

Sheriff

16. The Sheriff has received the Small, Rural and Tribal Enforcement Agency Body Worn Camera Grant as well as the Humbolt Toiyabe and Inyo National Forest Patrol Grants for inclusion of \$25,645 in revenues and qualifying expenditures.

17. The Sheriff Off Highway Vehicle Fund (145-22-440) operates a grant with a funding cycle that runs September through September. The requested increase in revenues of \$23,7070 and corresponding expenditures of \$49,209 using fund balance of \$63,500 to purchase a Jeep Wrangler for Off Highway Vehicle patrols in Mono County.

The above summarizes all budget adjustment requests that do not require the use of contingency funds. The contingency adopted as part of the FY 2023-24 Budget was \$849,514. After the shortfall for the CRIS radio system, the current contingency for use through June 30, 2024 is \$706,274. Three departments have requested use of contingency funds at Mid-year review for a total of \$116,597. If the following adjustments are approved there will be a balance of \$589,677 in contingency funds for use through June 30, 2024.

The below table depicts the FY 2023-24 Budget contingency and uses:

<b>Contingency</b>	
FY 2023-24 Budget	\$ 849,514
CRIS implementation 1/9/24	\$ 143,240
<i>Contingency available at Mid-year</i>	<u>\$ 706,274</u>
Requested by Departments at Mid-year	
1. Probation	\$ 67,658
2. Office of Emergency Management	\$ 28,850
3. Finance	\$ 20,089
Total Mid-year requests	<u>\$ 116,597</u>
<i>Contingency balance, after mid-year</i>	<u>\$ 589,677</u>

The three Mid-year requests for contingency are summarized below:

1. The Probation Officers association signed a new Memorandum of Understanding (MOU) on September 12<sup>th</sup> 2023 and the cost increases were not included in the adopted budget. The annual cost increases in salary and benefits from the MOU are being included as an adjustment at Mid-year requesting use of \$67,658 in contingency funds.
2. Office of Emergency Management has requested an increase in total appropriations of \$28,850 for the inclusion of the Genasys (GEM) Emergency Alert/Management System services contract, wildfire mitigation tools and educational materials for implementing the Wildfire Mitigation program.

3. Finance requested a total increase in appropriations of \$20,089 for software license cost increases including RT Lawrence for remittance processing solutions, Basic Gov, Deckard Technologies for Short Term Rental tracking, and GovInvest. There is also a need for increase in appropriations for Special District audits.

**In conclusion:**

The remaining known items that have not been adjusted as part of Mid-year review are the cost increases from the Mono County Public Employees (MCPE) Memorandum of Understanding (MOU) signed and implemented on December 12<sup>th</sup> 2023 as well as the 3% COLA for At-will employees approved on January 9, 2024. The central budget team chose not to adjust all departments at Mid-year for the above because most of the cost increases will be absorbed by vacancies. The cost for the MCPE MOU is estimated to be \$621,263 if all positions were filled. Given the number of vacancies the actual cost increase will be less than that and will be absorbed in the current budget appropriations for salaries and benefits. The cost of the 3% COLA for at-will employees is estimated to be \$93,210. The corresponding 3% cost share of all non PEPRA pension members will also play into the actual costs through year end. The CAO's office and Finance will be watching the above closely and bring back corresponding adjustments as needed at third-quarter or year end.

**Attachments**

Attachment A – Mid-year requested adjustments by department

## Attachment A - Budget adjustments by Department

### Behavioral Health

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
1. BH 120-41-840 (Behavioral Health)	Revenues	Operating Transfers In	120-41-840-18100	\$25,000
BH 120-41-840 (Behavioral Health)	Expenses	Contract Services	120-41-840-32450	\$25,000
2. BH 120-41-845 (Drug & Alcohol)	Revenues	Operating Transfers In	120-41-845-18100	\$947,332
3. BH 121-41-841 (Mental Health Service Act)	Expenses	Membership Fees	121-41-841-31700	\$2,370
BH 121-41-841 (Mental Health Service Act)	Expenses	Copier Pool	121-41-841-32030	\$600
BH 121-41-841 (Mental Health Service Act)	Expenses	Contract Services	121-41-841-32450	\$196,200
BH 121-41-841 (Mental Health Service Act)	Expenses	Rents & Leases - Real Property	121-41-841-32950	\$3,350
BH 121-41-841 (Mental Health Service Act)	Expenses	Special Dept-Student Loan Reim	121-41-841-33121	\$2,500
BH 121-41-841 (Mental Health Service Act)	Expenses	Fixed Assets: Buildings	121-41-841-53022	\$65,000
4. BH 122-41-840 (Behavioral Health Realignment)	Expenses	Operating Transfers Out	122-41-840-60100	\$907,332

### County Administration

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
5. CA 142-22-440 (Homeland Security Grant)	Revenues	Fed-Homeland Security	142-22-440-15510	\$87,762
CA 142-22-440 (Homeland Security Grant)	Expenses	Expenditures	142-22-440-20010	\$87,762
6. CA 188-27-251 (Housing)	Revenues	Operating Transfers In	188-27-251-18100	\$3,000,000
CA 188-27-251 (Housing)	Expenses	Contract Services	188-27-251-32450	\$600,000
CA 188-27-251 (Housing)	Expenses	Fixed Assets: Buildings	188-27-251-53022	\$2,072,174
CA 188-27-251 (Housing)	Expenses	Operating Transfers Out	188-27-251-60100	\$327,826
7. CA 194-10-001 (ARPA & LATCF)	Expenses	Operating Transfers Out	194-10-001-60100	\$3,000,000

### District Attorney

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
8. DA 100-21-430 (District Attorney)	Expenses	Permanent	100-21-430-21100	-\$52,309
DA 100-21-430 (District Attorney)	Expenses	Medicare	100-21-430-22101	-\$782
DA 100-21-430 (District Attorney)	Expenses	401a Contributions	100-21-430-22103	-\$237
DA 100-21-430 (District Attorney)	Expenses	State Disability	100-21-430-22105	-\$695
DA 100-21-430 (District Attorney)	Expenses	Unemployment	100-21-430-22106	-\$124
DA 100-21-430 (District Attorney)	Expenses	Cellphone Stipends	100-21-430-22109	-\$396
DA 100-21-430 (District Attorney)	Expenses	Health (Medical-Dental-Vision)	100-21-430-22110	-\$288
DA 100-21-430 (District Attorney)	Expenses	Pension	100-21-430-22120	-\$15,941
DA 100-21-430 (District Attorney)	Expenses	PRST Contribution	100-21-430-22125	-\$3,685
DA 100-56-433 (Victim Witness)	Expenses	Permanent	100-56-433-21100	\$52,309
DA 100-56-433 (Victim Witness)	Expenses	Medicare	100-56-433-22101	\$782
DA 100-56-433 (Victim Witness)	Expenses	401a Contributions	100-56-433-22103	\$237
DA 100-56-433 (Victim Witness)	Expenses	Life Insurance	100-56-433-22104	\$3
DA 100-56-433 (Victim Witness)	Expenses	State Disability	100-56-433-22105	\$695
DA 100-56-433 (Victim Witness)	Expenses	Unemployment	100-56-433-22106	\$124
DA 100-56-433 (Victim Witness)	Expenses	Cellphone Stipends	100-56-433-22109	\$396
DA 100-56-433 (Victim Witness)	Expenses	Health (Medical-Dental-Vision)	100-56-433-22110	\$288
DA 100-56-433 (Victim Witness)	Expenses	Pension	100-56-433-22120	\$15,941
DA 100-56-433 (Victim Witness)	Expenses	PRST Contribution	100-56-433-22125	\$3,685

## Economic Development

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
9. ED 105-19-191 (Tourism)	Revenues	Miscellaneous Revenue	105-19-191-17010	\$5,000
ED 105-19-191 (Tourism)	Expenses	Contract Services	105-19-191-32450	\$5,000

## Finance

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
10. FN 655-10-305 (Copier Pool)	Expenses	Capital Equipment, \$5,000+	655-10-305-53030	\$4,000

## Health and Human Services

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
11. HHS 133-41-860 (Emergency Preparedness)	Revenues	Fed: BT - HPP Hospital Preparedness Prc	133-41-860-15660	\$8,904
HHS 133-41-860 (Emergency Preparedness)	Revenues	Fed: BT - PHEP PH Emergency Preparedness	133-41-860-15661	\$14,651
HHS 133-41-860 (Emergency Preparedness)	Expenses	Contract Services	133-41-860-32450	\$4,061
HHS 133-41-860 (Emergency Preparedness)	Expenses	Special Department Expense	133-41-860-33120	\$19,298
HHS 133-41-860 (Emergency Preparedness)	Expenses	Civic Center Rent	133-41-860-60110	\$96
HHS 133-41-860 (Emergency Preparedness)	Expenses	EBS Admin Fee	133-41-860-22107	\$75
HHS 133-41-860 (Emergency Preparedness)	Expenses	Survivor's Benefit	133-41-860-22108	\$25

## Probation

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
12. PR 184-23-520 (Public Health and Safety Grant)	Revenues	St: Misc State Revenue	184-23-520-15498	\$759,873
PR 184-23-520 (Public Health and Safety Grant)	Expenses	Permanent	184-23-520-21100	\$70,944
PR 184-23-520 (Public Health and Safety Grant)	Expenses	Other Employee Benefits	184-23-520-22100	\$56,780
PR 184-23-520 (Public Health and Safety Grant)	Expenses	Professional & Specialized Ser	184-23-520-32500	\$121,709
PR 184-23-520 (Public Health and Safety Grant)	Expenses	Special Department Expense	184-23-520-33120	\$510,440
13. PR 680-23-520 (Probation CCP 2011)	Expenses	Operating Transfers Out	680-23-520-60100	\$65,000
14. PR 681-23-500 (Probation YOBG 2011)	Expenses	Technology Expense-Software Licenses	681-23-500-32020	\$13,400
PR 682-23-520 (Probation SB 678 2011)	Expenses	Technology Expense-Software Licenses	682-23-520-32020	\$31,260
15. PR 688-23-520 (Drug Court Grant)	Revenues	Fed: Drug Court Grant	688-23-520-15625	\$125,000
PR 688-23-520 (Drug Court Grant)	Expenses	Permanent	688-23-520-21100	\$41,876
PR 688-23-520 (Drug Court Grant)	Expenses	Other Employee Benefits	688-23-520-22100	\$22,082
PR 688-23-520 (Drug Court Grant)	Expenses	Office Expense	688-23-520-32000	\$26,930
PR 688-23-520 (Drug Court Grant)	Expenses	Professional & Specialized Ser	688-23-520-32500	\$4,540
PR 688-23-520 (Drug Court Grant)	Expenses	Special Department Expense	688-23-520-33120	\$13,345
PR 688-23-520 (Drug Court Grant)	Expenses	Travel & Training Expense	688-23-520-33350	\$9,726
PR 688-23-520 (Drug Court Grant)	Expenses	Motor Pool Expense	688-23-520-33360	\$6,501

## Sheriff

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
16. SH 100-22-440 (Sheriff)	Revenues	Fed: Misc Fed Grants	100-22-440-15819	\$18,000
SH 100-22-440 (Sheriff)	Revenues	Law Enforce Fed Land Services	100-22-440-16231	\$7,645
SH 100-22-440 (Sheriff)	Expenses	Equip Maintenance & Repair	100-22-440-31200	\$7,645
SH 100-22-440 (Sheriff)	Expenses	Technology Maintenance and Repair	100-22-440-31205	\$18,000
17. SH 145-22-440 (Off Highway Vehicle Fund)	Revenues	St: Off-Hwy Vehicle Grant	145-22-440-15410	\$23,707
SH 145-22-440 (Off Highway Vehicle Fund)	Expenses	Capital Equipment, \$5,000+	142-22-440-53030	\$60,000
SH 145-22-440 (Off Highway Vehicle Fund)	Expenses	Overtime	145-22-440-21120	-\$13,323
SH 145-22-440 (Off Highway Vehicle Fund)	Expenses	Equip Maintenance & Repair	145-22-440-31200	\$2,311

SH 145-22-440 (Off Highway Vehicle Fund)	Expenses	Vehicle Fuel Costs	145-22-440-33351	\$921
SH 145-22-440 (Off Highway Vehicle Fund)	Expenses	Motor Pool Expense	145-22-440-33360	-\$700

## Contingency

<i>Proposal</i>	<i>Type</i>	<i>Account Name</i>	<i>Account String</i>	<i>Requested Adjustment</i>
1. PR 100-23-520 (Probation)	Expenses	Permanent	100-23-520-21100	\$48,541
PR 100-23-520 (Probation)	Expenses	Education Add-on Pay	100-23-520-21103	\$968
PR 100-23-520 (Probation)	Expenses	Medicare	100-23-520-22101	\$777
PR 100-23-520 (Probation)	Expenses	401a Contributions	100-23-520-22103	\$1,610
PR 100-23-520 (Probation)	Expenses	State Disability	100-23-520-22105	\$644
PR 100-23-520 (Probation)	Expenses	Pension	100-23-520-22120	\$9,118
PR 100-23-520 (Probation)	Expenses	Uniform Allowance	100-23-520-30120	\$6,000
2. CA 100-27-465 (Office of Emergency Management)	Expenses	Office Expenses	100-27-465-32000	\$1,200
CA 100-27-465 (Office of Emergency Management)	Expenses	Contract Services	100-27-465-32450	\$3,150
CA 100-27-465 (Office of Emergency Management)	Expenses	Small Tools & Instruments	100-27-465-33010	\$24,500
3. FN 100-12-070 (Finance)	Expenses	Membership Fees	100-12-070-31700	-\$314
FN 100-12-070 (Finance)	Expenses	Technology Expense-Software Licenses	100-12-070-32020	\$11,046
FN 100-12-070 (Finance)	Expenses	Annual Audit	100-12-070-32350	\$9,800
FN 100-12-070 (Finance)	Expenses	Professional & Specialized Ser	100-12-070-32500	-\$7,348
FN 100-12-070 (Finance)	Expenses	Publications & Legal Notices	100-12-070-32800	\$5,000
FN 100-12-070 (Finance)	Expenses	Special Department Expense	100-12-070-33120	-\$1,321
FN 100-12-070 (Finance)	Expenses	Travel & Training Expense	100-12-070-33350	\$3,226
Use of Contingency for above increases in appropriations				
ND 100-10-330 (GF Contingency)	Expenses	Contingency	100-10-330-91010	-\$116,597



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**TIME REQUIRED**

**SUBJECT** Closed Session - Existing Litigation

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION. Paragraph (1) of subdivision (d) of Government Code section 54956.9. Name of cases: County of Mono v. Amerisourcebergen Drug Corporation; Cardinal Health, Inc.; McKesson Corporation; Purdue Pharma L.P.; Purdue Pharma, Inc., et al. United States District Court, Eastern District of California, Case No. 2:18-cv-01149-MCE-KJN.

**RECOMMENDED ACTION:**

**FISCAL IMPACT:**

**CONTACT NAME:**

**PHONE/EMAIL:** /

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

<p><a href="#">Click to download</a></p> <p>No Attachments Available</p>
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**History**

Time	Who	Approval
2/13/2024 9:42 AM	County Counsel	Yes
2/12/2024 5:30 PM	Finance	Yes
2/13/2024 12:42 PM	County Administrative Office	Yes



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**TIME REQUIRED**

**SUBJECT** Closed Session - Existing Litigation

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION. Paragraph (1) of subdivision (d) of Government Code section 54956.9. Name of case: Mono v. KR Property et al. Case number: CV200081

**RECOMMENDED ACTION:**

**FISCAL IMPACT:**

**CONTACT NAME:**

**PHONE/EMAIL:** /

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

<p><a href="#">Click to download</a></p> <p>No Attachments Available</p>
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**History**

Time	Who	Approval
2/15/2024 4:56 PM	County Counsel	Yes
2/16/2024 11:11 AM	Finance	Yes
2/16/2024 11:17 AM	County Administrative Office	Yes



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**TIME REQUIRED**

**SUBJECT** Closed Session – Real Property  
Negotiation

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

CONFERENCE WITH REAL PROPERTY NEGOTIATOR. Government Code section 54956.8. Property Address: 264 Highway 182, Bridgeport, CA. County Negotiator: Mary Booher. Negotiating Parties: Garth Moore and Mono County. Under Negotiation: Price, terms, and conditions.

**RECOMMENDED ACTION:**

**FISCAL IMPACT:**

**CONTACT NAME:**

**PHONE/EMAIL:** /

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

<p><a href="#">Click to download</a></p> <p>No Attachments Available</p>
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**History**

Time	Who	Approval
2/13/2024 9:42 AM	County Counsel	Yes
2/12/2024 5:30 PM	Finance	Yes
2/13/2024 7:33 PM	County Administrative Office	Yes



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**TIME REQUIRED**

**SUBJECT** Closed Session – Real Property  
Negotiation

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

CONFERENCE WITH REAL PROPERTY NEGOTIATORS. Government Code section 54956.8. Property Address: 34 Kirkwood Street, Bridgeport, CA. County Negotiator: Mary Booher and Christine Bouchard. Negotiating Parties: Brianna Brown and County of Mono. Under Negotiation: Price, terms, and conditions.

**RECOMMENDED ACTION:**

**FISCAL IMPACT:**

**CONTACT NAME:**

**PHONE/EMAIL:** /

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

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**History**

Time	Who	Approval
2/15/2024 4:56 PM	County Counsel	Yes
2/15/2024 2:37 PM	Finance	Yes
2/16/2024 10:12 AM	County Administrative Office	Yes



**OFFICE OF THE CLERK  
OF THE BOARD OF SUPERVISORS**

**REGULAR AGENDA REQUEST**

Print

**MEETING DATE** February 20, 2024

**TIME REQUIRED**

**SUBJECT** Closed Session - Labor Negotiations

**PERSONS  
APPEARING  
BEFORE THE  
BOARD**

**AGENDA DESCRIPTION:**

(A brief general description of what the Board will hear, discuss, consider, or act upon)

CONFERENCE WITH LABOR NEGOTIATORS. Government Code Section 54957.6. Agency designated representative(s): Sandra Moberly, Mary Booher, Stacey Simon, Janet Dutcher, and Christine Bouchard. Employee Organization(s): Mono County Sheriff's Officers Association (aka Deputy Sheriff's Association), Local 39 - majority representative of Mono County Public Employees (MCPE) and Deputy Probation Officers Unit (DPOU), Mono County Paramedic Rescue Association (PARA), Mono County Correctional Deputy Sheriffs' Association. Unrepresented employees: All.

**RECOMMENDED ACTION:**

**FISCAL IMPACT:**

**CONTACT NAME:**

**PHONE/EMAIL:** /

**SEND COPIES TO:**

**MINUTE ORDER REQUESTED:**

YES  NO

**ATTACHMENTS:**

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**History**

Time	Who	Approval
2/13/2024 9:42 AM	County Counsel	Yes
1/29/2024 4:40 PM	Finance	Yes
2/13/2024 7:33 PM	County Administrative Office	Yes