CALIFORNIA CITRUS PEST AND DISEASE PREVENTION COMMITTEE
FINANCE SUBCOMMITTEE MEETING

Meeting Minutes
Thursday, August 27, 2026

Opening:
The Finance Subcommittee webinar was called to order at 1:30 P.M. on August 27, 2026, by Subcommittee Chair Mark McBroom.

Subcommittee Members Present:

Mark McBroom	James McFarlane	Kurt Metheny
Jay Gillette	Jeff Steen	

Subcommittee Members Absent:

CDFA Staff and Guests:

Carl Baum	Margaret O'Neill	Nilan Watmore
Paul Figueroa	Michael Soltero	Jennifer Willems
Anmol Joshi	ThuyVy Truong	Jason Wu
Eduardo Lopez	Claudia Vazquez	Sandra Zwall
Keith Okasaki		

All attendees participated via webinar

Call to Order, Roll Call, Public Comments
Chairman, Mark McBroom, welcomed Subcommittee members, guests and staff participating via webinar. There were no public comments. Per Mark, the "Revenue Reserve Fund" agenda item will be discussed after the "Review FY 2025-26 Revenue" agenda item.

Review Fiscal Year (FY) 2025-26 Revenue
Jason Wu presented the updated budget format for 2025-26 revenue. Citrus Pest and Disease Prevention Division (CPDPD) received $19,734,737 in revenue for the reporting months of October 2025 to July 2026, which converts to 207,734,081 cartons and is 108% of the projected 191,299,444 cartons. For reference, the projected revenue amount based on projected cartons was $18,173,447.

Revenue Reserve Fund
Claudia Vazquez reminded Subcommittee members that at a previous meeting in 2025 there was a recommendation to build a reserve in the Agricultural Fund (AF) in case of any unexpected events or expenses. Mark agreed that it is a good idea to have a reserve and it would allow CPDPD to respond quickly in the event of an emergency. The CDFA Budget Office recommends a reserve to cover three to six months of costs paid for by the AF, which would be $4 million and $8 million, respectively. The Subcommittee members agreed that it would be best to initiate a plan to establish a

reserve in the AF with the savings from FY 2025-26, and then set a target balance each year to slowly build up the amount. James McFarlane voiced that while having a reserve in the AF is fiscally responsible, it is important to remember not to take any funds away from other important activities that may need them.

Recommendation to move to Full Committee: To implement a reserve in the agricultural fund with a goal of reaching $4 million in FY 2026-27, $6 million in FY 2027-28 and $8 million in FY 2028-29.
First: Kurt Metheny
Second: Jay Gillette
Vote: 5 ayes, 0 nays, 0 abstains. Recommendation passed unanimously.

CPDPD Assessment Analysis
Claudia presented a display showing carton projections and assessment rates. The current approved AF budget for FY 2026-27 is $17.7 million. The current assessment rate is $0.095 per carton. If the program receives less than 193,773,583 cartons at $0.095 per carton, the program will be unable to support the approved AF budget.

Kurt asked if there were any changes to the General Fund (GF) or Federal Fund (FF) that could have any impact on the AF. Claudia explained that as of this meeting, there has been no change to the other funds. CPDPD is expected to receive $4.6 million from the GF and $12.1 million from the FF.

Recommendation to move to Full Committee: To continue the assessment rate of $0.095 per carton, at the start of October 1, 2026.
First: Jeff Steen
Second: James McFarlane
Vote: 5 ayes, 0 nays, 0 abstains. Recommendation passed unanimously.

Review FY 2025-26 Expenditures
Claudia Vazquez presented the displays for the FY 2025-26 approved budget and expenditures. June 2026 closed in the Financial Information System for California (FI$Cal) with $2,523,297 in expenditures. The FY 2025-26 YTD total is $28,078,634 with a remaining balance of $5,005,121. These savings can be attributed to reduced personnel costs, reduced treatment expenses from less use of commercial vendors and new response protocols for infected trees. Due to adjustments made by the Budget Office (BO), the indirect budget ended higher than the original estimate that was given to CPDPD. This also applies to the GF balance as CPDPD received more GF allocation than the estimate originally given by the BO. The Multi-pest Survey (MPS) activity was over budget in all three districts, which is a reflection that there were less field response activities in response to detections throughout the year than anticipated. While MPS was overspent, activities for Asian Citrus Psyllid (ACP) Survey and Treatment were both underspent. The Data Analysis and Outreach activities will no longer be shown with the Northern District details and will now be shown as statewide activities. Overall, CPDPD anticipates closing the FY 2025-26 under budget and the savings will help fund a reserve.

Claudia presented a funding source summary for the Emergency Fund (E -Fund) for Huanglongbing in Ventura County (HLB-Ventura). The E-Fund expenditures from FY 2024-25 for HLB-Ventura are $645,515 with a remaining balance of $790,685. The E-Fund ending date has been extended to June 30, 2027 and the scope of work has been updated to include both Ventura and Santa Barbara counties. CPDPD is requesting an E-Fund for Imperial County in the amount of $934,055, however the E-Fund is not guaranteed, and those costs will fall under the Southern District unless the E-Fund is approved.

Claudia presented a display of encumbrances categorized by District/Activity similar to the expenditures display but only refers to agreements and purchase orders.

Finance Subcommittee Dashboard
Claudia recalled the approved strategic plan to improve financial tracking and transparency for the Committee. CPDPD is working on producing a dashboard that provides revenue and expenditure data in a more accessible way. The current approved PowerPoint template will be converted into a dashboard that Subcommittee members can access for the most up-to-date numbers. CPDPD will provide a demonstration for the dashboard in the next meeting and gather feedback on improving visual displays and the final product.

The meeting was adjourned at 2:37 P.M. The next Finance Subcommittee meeting will be held on November 17, 2026, at 9:00 A.M.