

California Department of Food and Agriculture (CDFA)
Minutes
of the Meeting
of the California Fruit Tree, Nut Tree, and Grapevine
Improvement Advisory Board (IAB)
Held on Tuesday, November 19, 2024

BOARD MEMBERS

Members Present: Jeremy Bahne, Cliff Beumel, Richard Bostock, Issac Duarte, Jay Jensen, Eckhard Kaesekamp, Dan Martinez, Denise Moore, Reid Robinson

Members Absent: Matt McMillan, Nicholas Podsakoff

OTHER ATTENDEES*

Maher Al Rwahnih, Morgan Burke, Tanya Goodson, William Hazzard, Joshua Kress, Phuong Lao, Brenda Lanini, Jasmine Minhas, Cristian Munos, Kelley Paugh, Philippe Rolshausen, Kristina Weber

*As self-reported in the Zoom application or sign-in sheet

WELCOME AND INTRODUCTIONS

Reid Robinson, Chair, called the meeting to order at 10:05 am and welcomed everyone. Robinson reviewed the topics of discussion and conducted roll call. A quorum was present for the Board.

RESEARCH PROGRESS REPORT PRESENTATIONS

William Hazzard, UC Davis, presented a research progress report titled, "Identifying Potential Biomarkers for Non-Infectious Bud Failure." The goal of this project was to identify potential biomarkers for the purposes of screening for non-infectious bud failure in almond. Using previously identified differentially methylated regions, Hazzard reported a trend for a decrease in methylation as bud failure increases, but differences were not statistically significant. When analyzing gene expression at candidate gene sites using qPCR, Hazzard identified 20 differentially methylated regions between trees with and without bud failure. Gene expression levels had the strongest correlation between samples with similar levels of bud failure.

Philippe Rolshausen, UC Riverside, presented a research progress report titled, "Managing Trunk Diseases in Plant Nursery Stock." The goal of this project was to identify cultural practices that increase the quality of grapevine nursery stock by targeting grapevine trunk diseases. Analyses were finished for fungal grapevine trunk diseases but not for *Allorhizobium*. Virtually all vines produced had one or more fungal pathogens present, and callusing was the most susceptible stage during propagation. The most common fungal pathogens, *Fusarium* and *Phaeoacremonium*, were enriched in vines with high wood necrosis, and the most common biocontrol fungus, *Trichoderma*, was enriched in vines with low wood necrosis. When evaluating the efficacy of biological control treatments against trunk disease, Rolshausen found that biological control treatments applied during callusing increased plant biomass.

FOUNDATION PLANT SERVICES UPDATE

Maier Al Rwahnih, Foundation Plant Services (FPS), provided an overview of results from the 2024 Classic Foundation Vineyard virus testing. Grapevine leafroll-associated virus 3 (GLRaV-3) was detected in a single vine for the first time in this vineyard. The infected vine was removed immediately, and surrounding vines will continue to be tested. Al Rwahnih presented evidence showing it was a recent infection.

In the Foundation Greenhouse Collection, Al Rwahnih reported a total of 1,195 clonal families in the greenhouse and 178 clonal families in propagation for the indoor collection. The building plans were completed for the Phase 2 screenhouse. Al Rwahnih stated that FPS funding from material sales and user fees were variable, and therefore they were seeking alternative sources for funding the Phase 2 greenhouse (including NCPN, IAB, PD/GWSS, PPA 7721, and private donors). Service awards from NCPN and IAB were noted as highly important to continue FPS operations and avoid staff layoffs.

Al Rwahnih described how FPS was moving forward with fruit tree tissue cultures. Two technicians at FPS were trained in use of cryotherapy to improve virus elimination in fruit trees. For quality management, Al Rwahnih outlined new tools for tracking and managing plant material – including an “intensive care unit” alert for plants and improved customer tools for online orders – and shared the recent hire of Ejay Dehal as Director of Production and Quality Assurance. Al Rwahnih announced acceptance of a Feature Article in Plant Disease on FPS’s approach to validating and seeking approval of HTS for quarantine and certification testing. The Board discussed potential funding sources for FPS.

CDFA PROGRAM UPDATE

Kelley Paugh, CDFA, introduced herself as a new Senior Environmental Scientist for the Nursery Services Program and IAB Manager. Paugh also announced the hiring of two new environmental scientists, Morgan Burke and Harmanpreet Sharma, to Nursery / IAB Laboratory and Nursery Greenhouse, respectively. The Nursery Stock Nematode Certification Forum was introduced as an upcoming public venue for experts to propose new soil treatments for nematode certification. Paugh said that the CDFA Marketing Branch Grapevine IAB Assessment audit was still pending completion for one nursery. Regarding the Grapevine Registration and Certification (R&C) Program, Paugh stated that fees would be increased due to expenditures exceeding revenue. CDFA would also continue to request R&C sales records from Grapevine R&C participants to improve tracking of R&C materials. Paugh confirmed that the updated Deciduous Fruit and Nut Tree Regulations were still under review by CDFA. The Board expressed frustration that the Deciduous Fruit and Nut Tree Regulations had not been approved after 14 years of working on it and requested a timeline for when the updated regulations were expected to be approved.

PROGRAM BUDGET AND ASSESSMENT COLLECTION UPDATE

Phuong Lao, CDFA, presented an update on the program's revenue and expenditures (attached). Lao reported that IAB revenue dropped from the prior year to present year by about \$500,000. FY 23/24 recently closed for CDFA, and total personnel services and operating expenses were currently at \$3,278,091. Total personnel services expenses dropped from \$522,963 in FY 22/23 to \$375,243 due to a direct cost recovery of \$151,084 to the Citrus Program for nursery lab staff assistance and supplies, as well as cost savings from staff turnover. Total cost recovery for Nursery Services was only \$280,000 in FY 23/24, with another cost saving derived from the new use of internal activity reports for staff time allocations. Lao provided an update on recent staff salary increases in FY 24/25. The Board requested information about the fund condition, and Lao explained that it was unchanged from the prior meeting.

REVIEW OF REQUEST FOR PROPOSALS FY 2025-2026

Paugh presented a draft Request for Proposals for FY 2025/2026 (attached). The Board expressed concern about the low fund condition. After discussion, the Board decided to postpone the Request for Proposals and not fund any research projects for the upcoming Fiscal Year.

Board Motion #1

The Board recommended that CDFA not post a Request for Proposals for Fiscal Year 2025/2026 due to budget constraints.

Motion: Reid Robinson

Second: Cliff Beumel

In Favor: Jeremy Bahne, Richard Bostock, Issac Duarte, Jay Jensen, Eckhard Kaesekamp, Dan Martinez, Denise Moore

Against: None

Absent: Matt McMillan, Nicholas Podsakoff

Abstain: None

REVIEW OF ASSESSMENT EXEMPTIONS (3 CCR § 3070)

Paugh presented the current assessment exemption list, as adopted in California Code of Regulations, Title 3, Section 3070 (attached). The Board reviewed prior discussions on exemptions for olive varieties and pistachio, and decided not to amend the exemption list at this time.

Board Motion #2

The Board recommended no changes to the assessment exemption list (California Code of Regulations, Title 3, Section 3070).

Motion: Dan Martinez

Second: Reid Robinson

In Favor: Jeremy Bahne, Cliff Beumel, Richard Bostock, Issac Duarte, Jay Jensen,
Eckhard Kaesekamp, Denise Moore

Against: None

Absent: Matt McMillan, Nicholas Podsakoff

Abstain: None

FORM 700 FILING AND REQUIRED TRAINING PRESENTATION

Lao instructed the Board that the Form 700 must be filed annually, and Board Members will be penalized for late filing (after April 1). Board members need to file only once if they serve on multiple boards. Ethics and Sexual Harassment Prevention trainings must be completed every two years. Lao also reviewed the Form 700 filing policies for new and leaving Board members.

NEXT MEETING/AGENDA ITEMS

The Board proposed the following agenda item for the next board meeting:

- New board member nominations (grapevine)

The next regularly scheduled IAB meeting was tentatively scheduled in Spring 2025.

ADJOURNMENT

Robinson adjourned the meeting at 1:42 pm.

Respectfully submitted by:

Kelley Paugh, Senior Environmental Scientist
Nursery Services Program
California Department of Food & Agriculture

Assessment History (paid in arrears by year)

| Year | Fruit Trees | Nut Trees | Olives | Grapevines | Penalty | Total Assessments |
|-------------|--------------------|-----------------|-----------------|--------------------|----------|--------------------|
| 2008 | \$516,902 | \$149,935 | | \$621,966 | | \$1,288,803 |
| 2009 | \$457,354 | \$205,687 | | \$546,957 | | \$1,209,997 |
| 2010 | \$426,176 | \$211,428 | | \$504,463 | | \$1,142,067 |
| 2011 | \$548,555 | \$257,425 | | \$564,861 | | \$1,370,841 |
| 2012 | \$682,467 | \$273,781 | | \$771,339 | | \$1,727,587 |
| 2013 | \$677,737 | \$347,828 | \$12,755 | \$1,060,720 | | \$2,099,040 |
| 2014 | \$878,810 | \$385,443 | \$26,618 | \$1,070,107 | | \$2,360,978 |
| 2015 | \$1,145,829 | \$532,519 | \$23,297 | \$940,448 | | \$2,620,143 |
| 2016 | \$1,527,683 | \$217,351 | \$35,306 | \$1,023,165 | | \$2,803,505 |
| 2017 | \$1,630,672 | \$161,921 | \$70,285 | \$1,211,757 | | \$3,074,635 |
| 2018 | \$1,624,031 | \$272,233 | \$91,824 | \$1,344,417 | | \$3,332,505 |
| 2019 | \$1,425,835 | \$200,346 | \$119,377 | \$1,498,241 | | \$3,243,799 |
| 2020 | \$1,460,912 | \$591,042 | \$22,229 | \$977,153 | | \$3,051,336 |
| 2021 | \$1,514,301 | \$211,554 | \$36,814 | \$981,078 | | \$2,743,748 |
| 2022 | \$1,521,084 | \$169,507 | \$37,936 | \$1,226,460 | \$11,389 | \$2,966,376 |
| 2023 | \$1,464,557 | \$189,427 | \$72,513 | \$1,225,810 | \$11,622 | \$2,963,928 |
| 2024 | \$1,193,770 | \$80,673 | \$46,984 | \$1,125,027 | | \$2,446,454 |

20241118 Rev.

4/25/2024 \$2,442,916
11/18/2024 \$2,446,454

IAB Research Encumbrances

| | FY 22/23 | | | | | |
|----------------|--------------------|---|-------------|-----------|-------------|----------|
| Agreement | Contractor | Description | Start Date | End Date | Amount | Balance* |
| 22-1228-000-SA | Leichty | Generating developmentally-informed gene coexpression networks for non-infectious bud failure in almond | 7/1/2022 | 6/30/2023 | \$47,584 | \$0 |
| 22-1587-000-SA | Brown | Development of a Biomarker for Walnut Juvenility | 7/1/2022 | 6/30/2023 | \$19,890 | \$11,504 |
| 22-1425-000-SA | Gradziel | Improved diagnostics, predictors, and control for Environmental Bud Failure (EBF) and Noninfectious Bud-Failure (NBF) | 7/1/2022 | 6/30/2023 | \$40,112 | \$18,474 |
| 22-1001-000-SA | Al Rwahnih | Study of the Effects of Little Cherry Virus-1 and Little Cherry Virus-2 on Different Cherry Rootstocks | 7/1/2022 | 6/30/2023 | \$41,678 | \$8,070 |
| 22-1000-000-SA | Al Rwahnih | Estimating GRBV within-vine distribution using sentinel vines planted at Russell Ranch Vineyard (year 1 of 2) | 7/1/2022 | 6/30/2023 | \$55,189 | \$0 |
| 22-1588-000-SA | Rolshausen / Cantu | Managing Fungal Trunk Diseases in Plant Nursery Stock | 7/1/2022 | 6/30/2023 | \$139,310 | \$39,630 |
| 22-0999-000-SA | Al Rwahnih | Support to Foundation Plant Services | 7/1/2022 | 6/30/2023 | \$1,771,350 | \$0 |
| 22-0075-000-SA | Al Rwahnih | FPS Greenhouse Building (year 1) | 7/1/2022 | 6/30/2023 | \$2,681,161 | \$0 |
| | | | Total 22/23 | | \$4,796,274 | \$77,679 |

| | FY 23/24 | | | | | |
|----------------|--------------------|---|-------------|-----------|-------------|-------------|
| Agreement | Contractor | Description | Start Date | End Date | Amount | Balance* |
| 23-0516-000-SA | Hazzard | Generating developmentally-informed gene coexpression networks for non-infectious bud failure in almond | 7/1/2023 | 6/30/2024 | \$49,707 | \$32,807 |
| 23-0514-000-SA | Al Rwahnih | Study of the Effects of Little Cherry Virus-1 and Little Cherry Virus-2 on Different Cherry Rootstocks | 7/1/2023 | 6/30/2024 | \$19,843 | \$8,070 |
| 23-0515-000-SA | Al Rwahnih | Estimating GRBV within-vine distribution using sentinel vines planted at Russell Ranch Vineyard (year 1 of 2) | 7/1/2023 | 6/30/2024 | \$55,189 | \$33,599 |
| 23-0706-000-SA | Rolshausen / Cantu | Managing Fungal Trunk Diseases in Plant Nursery Stock | 7/1/2023 | 6/30/2024 | \$116,915 | \$110,733 |
| 23-0431-000-SA | Al Rwahnih | Support to Foundation Plant Services | 7/1/2023 | 6/30/2024 | \$1,564,342 | \$780,000 |
| 22-0075-000-SA | Al Rwahnih | FPS Greenhouse Building (year 2) | 7/1/2023 | 6/30/2024 | \$1,318,839 | \$120,061 |
| | | | Total 23/24 | | \$3,124,835 | \$1,085,270 |

IAB Research Encumbrances

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| | FY 24/25 | | | | | |
|-------------|--------------------|--|------------|-----------|-------------|-------------|
| Agreement | Contractor | Description | Start Date | End Date | Amount | Balance* |
| | Hazzard | Identifying Potential Biomarkers for Non-Infectious Bud Failure Using Site Specific DNA Methylation and RNA Expression | 7/1/2024 | 6/30/2025 | \$23,264 | \$23,264 |
| | Al Rwahnih | Support to Foundation Plant Services | 7/1/2025 | 6/30/2025 | \$1,564,342 | \$1,564,342 |
| | Rolshausen / Cantu | Managing Fungal Trunk Diseases in Plant Nursery Stock | 7/1/2024 | 6/30/2025 | \$58,224 | \$58,224 |
| Total 24/25 | | | | | \$1,645,830 | \$1,645,830 |

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| Expenditures Detail | FY 2022-23 | FY 2023-24 | FY 2024-25 | | |
|---|-------------|-------------|-------------|-----------|---|
| | PPY Actual* | PY Actual* | Budget | CY | |
| Personnel Services | | | | | |
| Permanent Salaries (YP Zhang, M. Burke, K. Paugh 40%, Plao 22% | \$279,054 | \$245,583 | \$300,000 | \$42,788 | 12%- YP FY24-25 5%YP FY25-26 5% FY26-27 KP&MB 3% FY24-25 (3years) |
| Temporary Salaries | \$80,882 | \$99,259 | \$120,000 | \$71,533 | 3% increase (3 Years) |
| Staff Benefits (Includes Unemployment Insurance) | \$163,027 | \$181,485 | \$184,536 | \$43,344 | |
| Direct Cosr Recovery from other program | | (\$151,084) | | | |
| Total Personnel Services | \$522,963 | \$375,243 | \$604,536 | \$157,665 | |
| Operating Expenses | | | | | |
| General Expenses and Supplies | \$4,631 | \$425 | \$2,000 | | |
| Communication | \$5,036 | \$3,864 | \$2,000 | | |
| Postage | \$665 | \$143 | \$1,000 | | |
| Travel (In State) | \$2,000 | \$0 | \$0 | | |
| Travel (Out of State) | \$0 | \$0 | \$0 | | |
| Training | \$527 | \$0 | \$1,000 | | |
| Facilities Operations | \$2,194 | \$1,280 | \$3,000 | | |
| Laboratory Supplies & Equipments | \$200,000 | \$167,853 | \$240,000 | | |
| Consulting and Professional Services | \$0 | \$0 | \$0 | | |
| Audits | \$0 | \$10,000 | \$10,000 | | |
| 20241118 Rev. | \$429,100 | \$280,000 | \$370,590 | | |
| Indirect State Administrative Costs (Pro Rata) | \$148,492 | \$394,357 | \$221,515 | | |
| Pension Payment (SB 84) | \$15,718 | \$15,718 | \$12,043 | | |
| Intradepartmental Charges Includes Division Costs, Executive/Adminstration, IT | \$132,912 | \$124,634 | \$124,252 | | |
| Foundation Plant Services | \$1,771,350 | \$659,750 | \$1,564,342 | | |
| FPS Greenhouse Building Funding (2 yrs) | \$2,681,161 | \$1,198,778 | \$0 | | |
| Research Contracts | \$197,999 | \$46,046 | \$81,488 | | |
| Total Operating Expenses & Equipment | \$5,591,785 | \$2,902,848 | \$2,633,230 | | |
| Total Personnel Services and Operating Expenses | \$6,114,747 | \$3,278,091 | \$3,237,766 | | |

* Pending future adjustments.

20241118 Rev.

ATTACHMENT

Fruit Tree, Nut Tree, and Grapevine Improvement Advisory Board (IAB)

Request for Proposal of Research Fiscal Year 202X-202X

Proposals Due by: April XX, 202X, 5:00 pm PST

Background and Purpose

The California Department of Food and Agriculture (CDFA) is pleased to announce, in coordination with the California Fruit Tree, Nut Tree, and Grapevine Improvement Advisory Board (IAB), a competitive solicitation process to promote production of high-quality tree and grapevine nursery stock. Funding is made possible from assessments on fruit tree, nut tree, olive, and grapevine nursery stock.

Funding and Duration

CDFA and the IAB reserve the right to offer an award that is less than the amount requested.

Funds awarded under this solicitation cannot be expended before July 1, 202X or after June 30, 202X. Researchers may submit multiyear projects; however, if the current year of a multi-year project is selected for funding, there is no guarantee that the project will be funded in the future.

For New Projects only (continuing projects should provide a full proposal by the deadline above): Due to limited funds for FY 2X-2X and ongoing commitments, the IAB anticipates only being able to fund a few new projects for this call. Investigators are encouraged to contact the IAB coordinator (IAB@cdfa.ca.gov) with their new proposal suggestion for initial assessment by the task force before preparing a full proposal. A project summary/abstract (see below, page 3 under 'GENERAL GUIDELINES') and estimated maximum budget should be included for this assessment by **March 1, 202X**. Investigators will be notified by the IAB if their pre-proposal is selected for a full proposal submission.

Research Priorities

The IAB has identified the following research priorities to help prospective applicants develop their projects and submit their projects to the most appropriate priority. Additional consideration *may* be given for projects that address the research priorities identified below.

- ***Diseases and Genetic Disorders.*** Projects addressing this priority should focus on at least one of the following:
 - Developing new or improving existing detection methods for virus and virus-like diseases (ELISA, PCR, biological indicators, etc.).
 - Virus elimination research (heat therapy, cold therapy, shoot tip culture, etc.).
 - Determining spread of viruses from one plant to another and developing management strategies.
 - Genetic disorders (bud failure, crinkle, etc.).
- ***Variety Identification.*** Projects addressing this priority should focus on developing or applying methods to identify varieties, including ampelography, fingerprinting, DNA markers, etc.

- **Registration and Certification (R&C) Program.** Projects addressing this priority should focus on the development of improved disease detection technology for the R&C Programs.
- **Education and Outreach.** Projects submitted under this priority should focus on promoting California-produced nursery stock by improving the public's knowledge and understanding of the California nursery industry (i.e., through the development of flyers, posters, videos).
- **Rootstock Issues.** Projects under this priority need to evaluate rootstock health and performance as it relates to the production of high-quality tree and grapevine rootstock.
 - Research on nematode distribution, nematode affects to rootstock, and development of mitigation or treatment measures.
 - Research into disease and pest-resistant rootstock varieties.
 - Development of alternatives to fumigants currently in use.
 - Research on other important diseases and pests that significantly affect the quality of rootstock.
- **Miscellaneous.** The IAB understands there is variability in research projects. For this reason, applicants may submit under this priority if projects focus on:
 - Assessment of economic impact of viruses (if data is lacking).
 - Research on other important diseases and pests that significantly affect the quality of nursery stock (e.g., crown gall).
 - Research that affects the whole industry.
 - New pests and diseases.
 - Research to improve the resilience and/or physiology of nursery plants.

Proposal Submission Process

Applicants are required to submit all of the items listed below:

1. Coversheet
2. Proposal Narrative
3. Budget Itemization
4. Proposal Presentation

Samples of these attachments are also available at: <https://www.cdfa.ca.gov/plant/pe/nsc/iab/>
Proposals must be submitted electronically to IAB@cdfa.ca.gov by 5:00pm PST on [April 21, 202X](#).

Using the guidelines below, applicant's proposals must include:

1. **COVERSHEET:**
 - The project title should be brief and descriptive.
 - Indicate fiscal year and projected duration of the project (i.e., ongoing, year 1 of 3, etc.). If the current year's project is selected for funding, there is no guarantee that the project will be funded in future years.
 - Identify the project leader's name, affiliation, mailing address, telephone number, and e-mail address.

- Identify any cooperating personnel's name(s) and affiliation(s), mailing address, telephone number, and e-mail address.
- Identify the contact person and his/her mailing address, telephone number, and e-mail address for further communication if different from above.
- See Attachment#1 for an example coversheet template. Coversheet template is also available online at: <https://www.cdfa.ca.gov/plant/pe/nsc/iab/>.

2. GENERAL GUIDELINES:

- Consult the above list of IAB Research Priorities to develop your project.
- Project Summary/Abstract – Provide a clear and concise summary of the proposed project, not to exceed one-half page. State the specific objectives of the proposed project and describe the approach to be used, as well as criteria to evaluate the project's success. Include other ideas that may be applied to nursery stock improvement that are not mentioned in IAB's priorities.
- Project's Benefit to Nursery Industry – Specify the problem to be addressed by the project and describe its extent, severity, and magnitude. Explain its linkage to IAB goals. Indicate the project's potential for measurable progress toward long-term or short-term solution(s) to the specific problem(s) addressed in the proposal. If applicable, explain the project's contribution to current knowledge. What new information or product will the project generate? If applicable, discuss incentives for growers to adopt proposed practices. Do not exceed three pages.
- Objectives – Provide a clear, concise, and complete statement of each specific research and/or educational objective.
- Workplans and Methods – Describe the activities and/or products that address each of the stated objectives. Explain the methods to be employed, indicating data to be gathered, parameters to be measured, and methods of analysis to be used, including sampling scheme and experimental design, if applicable. For multi-year projects, include a workplan for each year of the project. The workplan should be organized into project tasks and sub-tasks, which are units of work designed to achieve specific objectives. Each task should be numerically identified and have a descriptive title, and should include the following information:
 - a. Brief task objective(s)
 - b. Activities and methods description
 - c. Task products and estimated completion dates
- Applicant must describe methods and procedures, in sufficient detail, to provide a good understanding of how each task will be conducted. Describe interim and final products or milestones for each task. Be sure sufficient time is allocated to complete each project task. Detail must be sufficient to allow for an evaluation of the reasonability of time and cost.
- Project Management and Evaluation – Describe the role of project leaders and cooperators. Briefly explain how the various participants' work will be coordinated. For projects that are primarily research oriented, provide a method for assessing the progress and success of the project. A peer review of on-going projects may occur, including a visit to your project site.

- Literature Review – Provide a review of the literature on similar problems. The published work of others may be quoted, provided quotations are clearly referenced. Provide information regarding this or similar proposals by you, or co-investigators, that have been submitted to other agencies or funding sources.
- Current and Pending Support – Identify the sources and amounts of all current and/or pending sources of support for this project.

3. BUDGET ITEMIZATION:

- Provide a project budget proposal (Attachment #2). An example budget template is available online at: <https://www.cdfa.ca.gov/plant/pe/nsc/iab/>.
- **July 1, 202X**, will be used as the project's start date. Complete a budget table for each fiscal year (July 1 - June 30) of the project. For multiple-year projects, include a budget page for each fiscal year of the project. There is no guarantee that a multiple-year project will be funded in the future.
- If your project requires the use and acquisition of nursery stock, please include those costs in your project budget.

The maximum indirect cost rate is ten (10) percent of the total personnel cost (salary and fringe benefits).

4. PROPOSAL PRESENTATION:

- In addition to a written proposal, applicants will need to prerecord a presentation outlining their proposed research and provide any relevant information for the board's consideration. The presentation can be recorded on any streaming medium (Zoom, YouTube, iMovie, or other screen casting website) and is not to exceed 15-minutes in length. As a reference, examples of presentations from FY 2023-24 Request for IAB Research Proposals are available online at: <http://maps.cdfa.ca.gov/Presentations/IAB>

Review and Evaluation Process

The review process consists of two levels. The first level is an administrative review to determine whether proposal requirement was met.

The second level is a technical review by a peer review panel to evaluate the merits of the proposal using the evaluation criteria outlines in **Attachment #3**.

General Guidelines for Progress and Final Reports

- **Progress Reports** – A minimum of one progress report must be submitted during the current funding year. An additional interim progress report may be required for consideration in evaluating funding of multiple-year projects. For each project objective:
 - a. Summarize the activities that are underway to accomplish this objective.
 - b. If planned activities or procedures were modified during this time period, please discuss.
 - c. Include data summaries and graphs as appropriate.

- **Final Report** – A final report must be submitted at the end of each fiscal year before the final invoice can be paid. *Ten percent (10%) of the total contract amount will be withheld for the research project until receipt and approval of the final report.* Restate the project objectives and timetable as stated in the original funded proposal and note, and justify any revisions in objectives and/or timetable as follows:
 - a. Report specific accomplishments and findings during the funded period.
 - b. Include data summaries and graphs as appropriate.
 - c. Where possible, relate accomplishments to practical application in the nursery industry.
- Progress and final reports should be limited to 2-5 pages. Please reference the assigned IAB agreement number on your reports and final invoices.
- **Summary** – A concise research summary/abstract, not to exceed more than one page, must be submitted for all projects funded by IAB at the end of each fiscal year. The summary/abstract should ideally be in an informative style, such as in *California Agriculture*. Please include graphs or pictures if necessary. This summary is an essential part of any research project and will be used by IAB to communicate research findings to the nursery industry, to the press, and to others.

ATTACHMENT #1

IAB – Sample Coversheet

| | |
|---|--|
| <u>Proposal To:</u> | California Department of Food and Agriculture Pest Exclusion Branch Nursery, Seed, and Cotton Program Attn: Kelley Paugh/Phuong Lao 1220 N Street, Room 241 Sacramento, CA 95814 (916) 654-0435 IAB@cdfa.ca.gov |
| <u>Title of Proposed Research:</u> | |
| <u>Proposed Duration:</u> | |
| <u>Starting Date:</u> | July 1, 202X |
| <u>Total Amount Requested:</u> | |
| <u>Submitting Organization:</u> | |
| <u>Department:</u> | |
| <u>Principal Investigator:</u> | PI Name Mailing Address Phone Email |
| <u>Cooperating Personnel:</u> | Name Affiliation Mailing Address Phone Email |
| <u>Send Award Notice to:</u> | Program Name Contact Person Mailing Address Phone Email |

ATTACHMENT #2

IAB - BUDGET PROPOSAL

Project Title/Description: _____

Project Leader: _____

Proposed Fiscal Year: _____

A. PERSONNEL SERVICES:

Individual's Classification @ \$ _____/hr. _____ (total hr.) \$ _____

Staff Benefits = _____ % \$ _____

TOTAL PERSONNEL SERVICES \$ _____

B. OPERATING EXPENSES:

Laboratory Supplies \$ _____

Travel (per diem) \$ _____

Postage \$ _____

Other: (Specify, i.e., cost of nursery stock) \$ _____

TOTAL OPERATING EXPENSES: \$ _____

C. INDIRECT COST: \$ _____

D. TOTAL BUDGET REQUESTED: \$ _____

- *Round dollar amount to the nearest dollar
- *Type out acronym “FTE”
- *Make sure % and dollar amount add up

DRAFT

**Fruit Tree, Nut Tree and Grapevine Improvement Advisory Board (IAB)
Research Proposal Evaluation Form
Fiscal Year 202X-2X**

Please include scores for all criteria below. **Peer (science) reviewers**, please place emphasis on proposal objectives, scientific methodology, and cost to perform proposed work. **Industry reviewers**, please emphasize significance of problem to the industry, applicability of results, and whether anticipated benefits will justify cost.

| | |
|--------------------------------------|--|
| Date Submitted for Review: | |
| Project/Research Title: | |
| Years to Complete Project: | |
| Amount Requested Fiscal Year 2X/2X: | |
| Other Sources of Funding and Amount: | |

| Evaluation: (Maximum 100 points) | Maximum | Score |
|--|------------|-------|
| The problem identified is significant to the nursery industry. | 20 | |
| The objectives identified are specific and clearly stated. | 20 | |
| The research methodology is sound and appropriate for stated objectives. | 20 | |
| The results will have immediate applications for the nursery industry. | 15 | |
| The budget is justified and appropriate. | 15 | |
| The time frame is reasonable for proposed research. | 5 | |
| The proposal will stimulate funding from other sources. | 5 | |
| Total | 100 | |

Comments: Please write any comments that will help the Board to evaluate this proposal, such as its scientific and technical qualities, or if this proposal duplicates other research, etc.

ATTACHMENT 1

California Fruit Tree, Nut Tree, and Grapevine Improvement Program 2024 Sales – Assessment Exemption List

In Title 3, California Code of Regulations, Division 4, Chapter 3, Subchapter 2, adopt:

Article 16. Nursery Stock Assessment

§ 3070. Fruit Tree, Nut Tree, and Grapevine Assessment

If you produce almond, apple, apricot, cherry, chestnut, nectarine, olive, peach, pear, plum, prune, quince, walnut, or grapevine nursery stock, including seeds, seedlings, rootstocks, budwood, graftwood, topstock, and cuttings, whether standard, dwarf, or semi-dwarf, fruit bearing or ornamental, you must pay an annual assessment of one percent (1%) of gross sales of such stock for your previous fiscal year.

Sales of the Following Nursery Stock are Exempt from the Assessment

(a) The Secretary exempts from assessment sales of the following species of pome and stone fruit trees, nut trees, and grapevines, varieties of olive trees, and ornamental varieties of apple, apricot, crabapple, cherry, nectarine, olive, peach, pear, and plum:

- (1) Amur chokecherry (*Prunus maackii*)
- (2) Butternut (*Juglans cinerea*)
- (3) Canada red chokecherry (*Prunus virginiana* 'Shubert')
- (4) Carolina laurel cherry (*Prunus caroliniana*)
- (5) Catalina cherry (*Prunus lyonii*)
- (6) Crabapple (*Malus* spp.)
- (7) English laurel (*Prunus laurocerasus*)
- (8) Evergreen pear (*Pyrus kawakamii*)
- (9) Flowering almond (*Prunus glandulosa* and *Prunus triloba*)
- (10) Flowering plum (*Prunus americana* and *Prunus cistena*)
- (11) Hazelnut/filbert (*Corylus* spp.)
- (12) Hickory (*Carya* spp.)
- (13) Hollyleaf cherry (*Prunus ilicifolia*)
- (14) Macadamia (*Macadamia* spp.)
- (15) Olive varieties Manzanillo and Gordal Sevillano
- (16) Otto Luyken laurel (*Prunus laurocerasus*)
- (17) Pecan (*Carya illinoensis*)
- (18) Pistachio (*Pistacia* spp.)
- (19) Portugal laurel (*Prunus lusitanica*)
- (20) Zabel laurel (*Prunus laurocerasus* 'Zabeliana')

Note: Authority cited: Sections 407 and 6981, Food and Agricultural Code.

Reference: Sections 6981, 6982, 6983 and 6986, Food and Agricultural Code.