



EVERYTHING TO KNOW ABOUT THE

# COMMUNITY BENEFIT FUND



April 2024

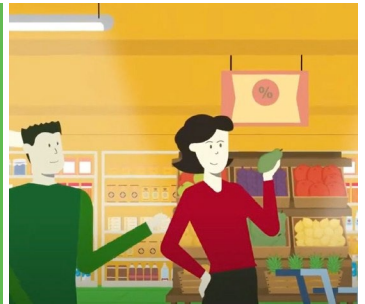
**“ There is no commerce without community. And there is no community without commerce. ”**

*– Michele Jennae, Author*



## A LEGACY OF COMMUNITY AND COMMERCE

*A ship comes to Port, tug and pilot operators bring her in, a skilled local ILWU crane operator offloads the cargo, Customs workers make sure the cargo is secure, and a trucker picks it up. All of these workers enjoy breakfast and lunch at local establishments and then head to local stores for supplies. The cargo then goes to retail, where Joe and Mary just got jobs to provide for their families. Their kids go to a school whose teachers prepare them for the future, and law enforcement keeps them safe.*



Since its inception in 1937, the Port of Hueneme has embraced a legacy of trade and community enrichment. Throughout this history, the Port and its customers directly or indirectly have provided thousands of jobs to community residents, supported many local business enterprises, and participated in a diversity of community events and activities. In addition to the positive economic impacts, Port customers pay their share for doing business here. The Port does not receive funding from taxpayers for operations, but rather runs off payments from its customers. Approximately 10% of this revenue is in turn provided to the City of Port Hueneme through negotiated agreements. These funds, totaling over \$2.6 million in fiscal year 2023, support City infrastructure and public services, and also mitigate the impacts of Port operations.

## **THE FORMATION OF THE COMMUNITY BENEFIT FUND**

### **IT'S ALL ABOUT COLLABORATION AND PARTNERSHIP FOR PUBLIC BENEFIT**

Through the course of time there are moments when questions are asked, and debates ensue. This was the case in 2013 when the City brought forth a legal challenge contending that Port's revenue sharing payments to the City were miscalculated. After 2 years of litigation, the City and the Port came to common ground and opted to settle the dispute on friendly terms outside the courts. A resulting settlement agreement in 2015 created a win-win for both parties.

The first collective win was a land transaction. For a payment of \$1.1 million, a 2-acre property lease to the City was dissolved 18 years in advance of its termination date, making that land available for Port use and new commerce opportunities. At the time, the City was faced with financial hardship and the \$1.1 million installment helped address budget shortfalls.

The other mutual win that evolved out of this landmark settlement included the creation of a Community Benefit Fund (CBF). The City and Port established this fund to re-energize their tradition of partnership and collectively agreed that working on projects together would foster unity and collaboration with the most impactful and meaningful results for the community. In this spirit of partnership, the City Council and the Board of Harbor Commissioners agreed to meet regularly and develop projects for the betterment of the community using allocations from the CBF. The agreement spells out that in years when the Port generates over \$13M in revenue, it allocates \$100,000 to a restricted CBF account for the purpose of investing in community projects and initiatives that are mutually agreed upon by the City and Port. To date, \$1,005,247 has been allocated by the Port to the CBF for this altruistic cause.

## **THE PROCESS FOR TO INVEST IN MUTUALLY BENEFICIAL PROJECTS**

The settlement agreement of 2015 established a process to ensure the spirit of partnership and collaboration among the Board of Harbor Commissioners and City Council members was upheld. The agreement requires that the City and Port each appoint three representatives (two members of the elected Harbor Commissioner Board and City Council and one member of the staff for each party), who will meet within 180 days following the start of any new fiscal year in those years that there is a positive balance of money deposited in the CBF. The Port and City representatives are tasked with mutually deciding on whether to spend any of the CBF on a project(s) that year, and if so, which project or projects will be selected for the expenditures. The decisions of the representatives will then be subject to approval of both the full Board of Harbor Commissioners and the entire City Council. If the representatives are unable to agree on expenditures for the CBF in a given year, the agreement calls on the City Council and Board of Harbor Commissioners to convene a joint meeting to discuss proposed projects in an open session with members of the public. If the City and Port do not agree after 3 years, each party receives 50% of the funds to spend at their individual discretion.

## ELIGIBLE COMMUNITY BENEFIT FUND PROJECTS

The agreement requires projects to fall within the following broad categories of public benefit:

- ▶ **Shoreline Protection:** Monitoring beach profiles, scrutinizing biannual sand replenishment operations and constructing associated improvements to protect the NCEL (owned by the District) and Hueneme Beach Park (owned by the City).
- ▶ **Community Development:** Implementing joint initiatives that foster the community's economic, social and environmental well-being including, but not limited to, public infrastructure improvements, sponsorship of special events, support of civic organizations, and similar activities.
- ▶ **Opportunistic Endeavors:** Pursuing opportunities that foster the shared mission and interest of the City and District not otherwise described above including, but not limited to, economic development grants, environmental mitigation, enterprise zone establishment, joint trade missions and similar activities.
- ▶ **Other Projects:** Any project or projects as may be agreed to in any year by the District's Board of Harbor Commissioners and the City Council, except for fiscal years 2014/15 and 2015/16 where the City as granted sole discretion can make such determination.





# COMMUNITY BENEFIT PROJECTS

## WHAT'S BEEN DONE FOR THE COMMUNITY

### FISCAL YEAR 2015 & 2016

The first two years (FY 2015 & 2016) projects were at the discretion of the City as long as it benefits the community. The monies were used on the following projects:

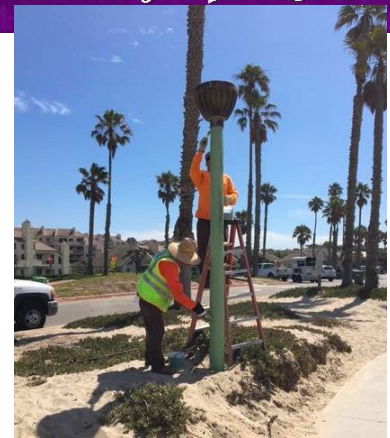
| DESCRIPTION  | AMOUNT VOTED     |
|--|------------------|
| Joint sponsorship of a Beach-Port celebration            | \$25,000         |
| Broaden/refine the mission of REACH                      | \$10,000         |
| Upgrade Council digital recording and Web page           | \$16,050         |
| Various improvements at Museum                           | \$26,200         |
| Youth Involvement Fair                                   | \$1,500          |
| Various improvements at new Chamber of Commerce location | \$19,000         |
| Emergency Preparedness program                           | \$17,500         |
| Pedestrian Safety projects                               | \$50,300         |
| Cops for Tots program w/ additional expense              | \$1,500          |
| Additional Emergency Preparedness Program (Spanish)      | \$1,600          |
| Crime Mapping  | \$2,700          |
| Seed money for Sister Cities program                     | \$5,500          |
| Establishment of Beach Advisory Commission               | \$10,000         |
| Interagency coalition on sand replenishment issues       | \$9,000          |
| Other initiatives  | \$4,150          |
| <b>PROJECT LIST TOTAL</b>                                | <b>\$200,000</b> |



## FISCAL YEAR 2017

For Fiscal Year 2017 the Joint Port/City Committee agreed on the following projects.

| DESCRIPTION  | AMOUNT VOTED     |
|--|------------------|
| Pedestrian crossing at Market Street & Hueneme Road (pedestrian activated) | \$15,000         |
| Community Events (Movies in the Park and similar activities)               | \$17,000         |
| Community Events - City's 70th Anniversary                                 | \$3,000          |
| Beautification projects (landscaping, public art, bus shelters)            | \$35,000         |
| REACH  | \$10,000         |
| Human Services and Public Safety projects (Homeless, etc.)                 | \$10,000         |
| Other local community organizations, i.e. Museum, Chamber                  | \$10,000         |
| <b>PROJECT LIST TOTAL</b>  | <b>\$100,000</b> |

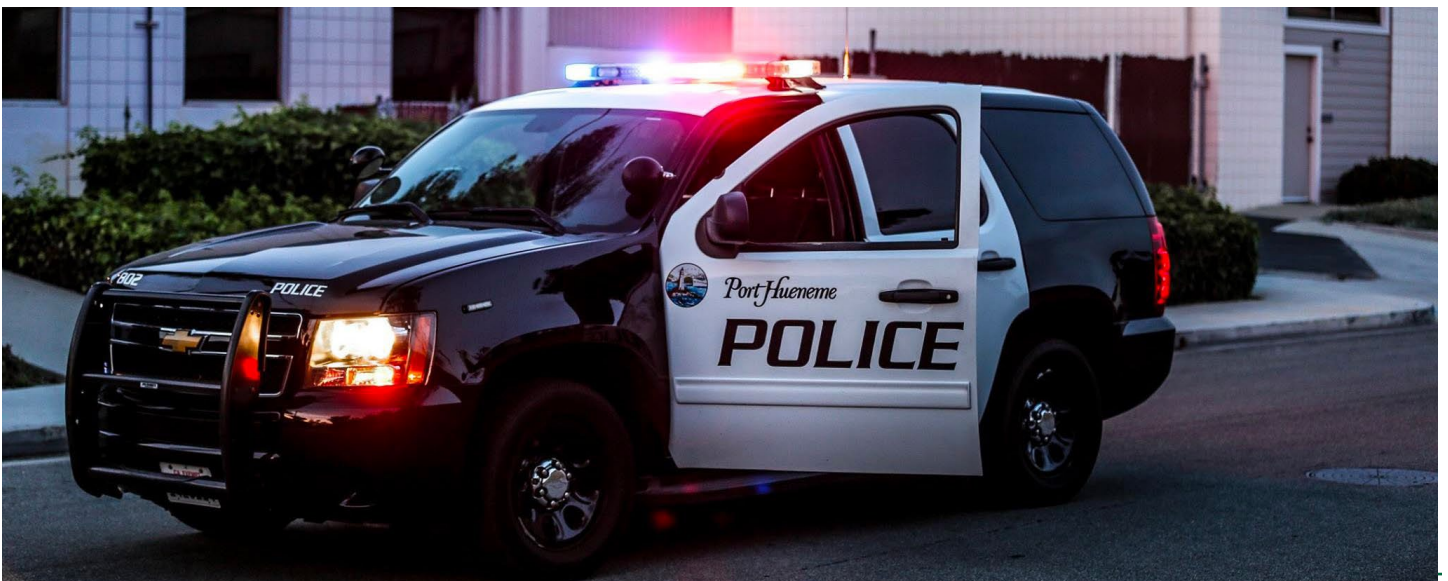




# FISCAL YEAR 2018

For Fiscal Year 2018 the Joint Port/City Committee agreed on the following projects:

| DESCRIPTION               | AMOUNT VOTED     |
|---------------------------|------------------|
| Community Homelessness    | \$10,000         |
| Public Safety             | \$40,000         |
| Park & Recreation         | \$50,000         |
| <b>PROJECT LIST TOTAL</b> | <b>\$100,000</b> |





## FISCAL YEAR 2019

For Fiscal Year 2019 the Joint Port/City Committee met on July 15, 2020 and November 17, 2020 to discuss projects for the 2018-2019 Community Benefit Fund.

| Description   | Amount Voted      |
|---|-------------------|
| Hueneme - 75 Celebration Initiative                 | \$ 7,000          |
| Moranda Park Renovations (Structural Analysis)      | \$ 15,000         |
| Sponsorship Cops for Tots (Annual)                  | \$ 2,500          |
| Bubbling Springs Park Farmer's Bridge-Seabee labor  | \$ 22,271         |
| Police Body Worn Camera System                      | \$ 55,850         |
| GOGov CRM Suite - Cloud based info/issue management | \$ 11,000         |
| Dog Park  | \$ 10,000         |
| <b>Project List total</b>                           | <b>\$ 123,621</b> |





## ***FISCAL YEAR 2020 - 2021***

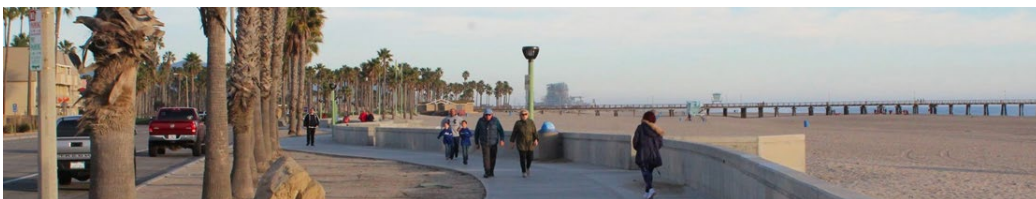
For Fiscal Year 2020 - 2021 the Joint Port/City Committee met on December 20, 2020 and October 18, 2021 to discuss projects for the 2020-2021 Community Benefit Fund.

| <b>Description</b>                             | <b>Amount Voted</b> |
|--|---------------------|
| Hot Water Pressure Machine (graffiti)          | \$ 7,500            |
| Sponsorship STEM Robotics                      | \$ 7,500            |
| Ocean/Junior Lifeguard Public Safety Equipment | \$ 12,626           |
| Beach ADA Access -                             | \$ 9,500            |
| Cats & Cradle Feral Cat Management             | \$ 3,000            |
| Mobile Library \$3,000                         | \$ 3,000            |
| Donation to Food Share                         | \$ 10,000           |
| Coastal Keepers                                | \$ 5,000            |
| Inlakech Cultural Arts (Youth Mariachi)        | \$ 5,000            |
| Reel Guppy Outdoors                            | \$ 5,000            |
| SEEAG  | \$ 5,000            |
| The Children's Workshop                        | \$ 5,000            |
| Caregivers                                     | \$ 1,200            |
| Habitat for Humanity                           | \$ 2,500            |
| Navy League                                    | \$ 2,500            |
| Ventura County Leadership Academy              | \$ 2,500            |
| Moranda Park Visitor Amenities                 | \$ 20,000           |
| Hueneme Park Sand Enhancement                  | \$ 20,000           |
| REACH -Youth Learn to swim                     | \$ 5,000            |
| REACH- Jr. Life guard                          | \$ 5,000            |
| Boys & Girls Club                              | \$ 10,000           |
| Port Hueneme High School Boosters              | \$ 5,000            |
| Police Explorers                               | \$ 5,000            |
| Cats & Cradle Feral Cat Management             | \$ 3,000            |
| Hueneme Beach Park Bike Station                | \$ 2,000            |
| Public Mural Project                           | \$ 15,000           |
| Public Monument-Mr. Bard                       | \$ 50,000           |
| <b>Project List total</b>                      | <b>\$ 226,826</b>   |

## **FISCAL YEAR 2022**

For Fiscal Year 2022, the Joint Port/City Committee met on October 21, 2022 to discuss projects for the 2022 Community Benefit Fund. An amount of \$2,066 was not allocated to projects and \$5,000 was not distributed to Cats & Cradle, for a total of \$7,066 remaining for FY2022.

| <b>Description</b>   | <b>Amount Voted</b> |
|--|---------------------|
| <b>Bard Monument – Public Art / Culture / Education</b>            | <b>\$30,000</b>     |
| <b>Public Mural Project</b>  | <b>\$25,000</b>     |
| <b>DC Coalition City and Port Trip – Joint Advocacy</b>            | <b>\$20,000</b>     |
| <b>BananaFest – Community Event</b>                                | <b>\$5,000</b>      |
| <b>Hueneme Beach Festival – Community Event</b>                    | <b>\$5,000</b>      |
| <b>Hueneme High School Booster Athletic Programs</b>               | <b>\$5,000</b>      |
| <b>Police Explorers - Youth Interested in Law Enforcement</b>      | <b>\$5,000</b>      |
| <b>Lego First -First Robotics Competition – Youth/Stem Program</b> | <b>\$5,000</b>      |
| <b>Audubon Society Environmental Stewardship for Birds</b>         | <b>\$5,000</b>      |
| <b>Inlakech Youth Music and Cultural Programs/Education</b>        | <b>\$5,000</b>      |
| <b>* Cats &amp; Cradle Feral Cat Management</b>                    | <b>\$5,000</b>      |
| <b>Reel Guppy Hueneme Youth Programming/ Education</b>             | <b>\$5,000</b>      |
| <b>Navy League Supports Local Personnel and Families</b>           | <b>\$5,000</b>      |
| <b>Project List Total</b>  | <b>\$125,000</b>    |
| <b>Available Fund Balance</b>                                      | <b>\$127,066</b>    |
| <b>*Funds not distributed</b>                                      | <b>\$5,000</b>      |
| <b>Over (Under)</b>  | <b>(\$7,066)</b>    |





## FISCAL YEAR 2023

For Fiscal Year 2023 the Joint Port/City Committee met on May 24, 2023 and October 3, 2023 to discuss projects for the 2023 Community Benefit Fund. The total amount of \$7,066 that was not distributed or allocated was added to 2023.

| Description  | Amount Voted     |
|--|------------------|
| <b>Bard Monument – Public Art / Culture / Education</b>  | <b>\$40,000</b>  |
| <b>Public Mural Project</b>  | <b>\$10,000</b>  |
| <b>DC Coalition City/Port Committee Trip – Joint Advocacy</b>  | <b>\$20,000</b>  |
| <b>Youth Interested in Law Enforcement</b>   | <b>\$5,000</b>   |
| <b>First Robotics Competition – Youth/Stem Program</b>   | <b>\$5,000</b>   |
| <b>Youth Music and Cultural Programs/Education</b>   | <b>\$5,000</b>   |
| <b>Hueneme Youth Programming/Education</b>   | <b>\$5,000</b>   |
| <b>Volunteers Assisting The Elderly</b>  | <b>\$5,000</b>   |
| <b>Community Youth Baseball Program</b>  | <b>\$5,000</b>   |
| <b>City-Port Community Events</b><br>\$5,000 for the Banana Festival<br>\$5,000 for the Hueneme Beach Festival<br>\$6,350 for 2 healthy community events, 6 months apart | <b>\$16,350</b>  |
| <b>Joint Sister City Relationship</b>  | <b>\$7,500</b>   |
| <b>Project List Total</b>  | <b>\$133,850</b> |
| <b>Available Fund Balance</b><br>(2023 \$127,734 & 2022 \$7,066)   | <b>\$134,800</b> |
| <b>Over (Under)</b>  | <b>(\$950)</b>   |



# COMMUNITY BENEFIT FUND HISTORY

Below is a breakdown of the Community Fund's history of contributions, reimbursements, and balances. FY 2024 is under consideration from FY 2025 allocation.

| CONTRIBUTION YEAR | VOTED   | UNVOTED  | TOTAL CBF CONTRIBUTION |
|-------------------|---|--|------------------------|
| FY 2015, FY 2016  | \$200,000   |  | \$200,000              |
| FY 2017           | \$100,000   |  | \$100,000              |
| FY 2018           | \$100,000   |  | \$100,000              |
| FY 2019           | \$123,621   |  | \$123,621              |
| FY 2020, FY 2021  | \$226,826   |  | \$226,826              |
| FY 2022           | \$125,000   | \$5,000<br>*added to FY2023 (Cats & Cradle)<br>\$2,066<br>*added to FY2023 Remaining Balance | \$127,066              |
| FY 2023           | \$133,850<br>2023 \$127,734<br>(2023 \$127,734 + \$7,066) | \$950  | \$127,734              |
| <b>TOTAL</b>      | <b>\$1,004,297</b>  | <b>\$950</b>   | <b>1,005,247</b>       |

Meetings to discuss investments begin July 1, 2024, and there is a 180-day window to jointly decide how to spend the dollars to support the community. If the Board and City Council do not reach a consensus, the funding will be carried over to the next fiscal year.

## THE PEOPLE THAT MADE PARTNERSHIP HAPPEN

### City Council

- Tom Figg
- Jon Sharkey
- Jim Hensley
- Sylvia Muñoz Schnopp
- Doug Breeze

### Board of Harbor Commissioners

- Jason Hodge
- Mary Anne Rooney
- Jess Herrera
- Arlene Fraser
- Manuel Lopez





The Port  
OF HUENEME



550  
ORANGE S. CARBITTO  
COMMUNITY CENTER  
CITY OF HUENEME



**Moranda Park**

