



MONTARA WATER AND SANITARY DISTRICT AGENDA

For Meeting Of: **August 20, 2026**

TO: BOARD OF DIRECTORS

FROM: Clemens Heldmaier, General Manager 

**SUBJECT: Review and Possible Action Concerning
Employee Wellness Program.**

The District offers a Wellness Program for full-time employees, contributing \$25 dollars per month toward a health or fitness expense of their choice, provided proper documentation is submitted.

In August, the District received a \$320 Wellness Grant from the Association of California Water Agencies Joint Powers Insurance Authority (ACWA JPIA). The program includes activities aimed at improving employee health and well-being, while also addressing personal issues that may impact productivity. Wellness initiatives can reduce absenteeism, enhance productivity and retention, foster a more positive and energetic workplace, lower healthcare costs, and decrease workplace accidents and injuries.

The Wellness Program runs annually from September to September. If all eligible employees participate and claim the full monthly reimbursement, the total annual cost would be \$2,400 dollars. So far this year, MWSD employees have used \$1,061.73 dollars.

Recommendation:

Authorize the use of up to \$2,400 dollars in District funds to support MWSD full-time employees' participation in wellness activities, reimbursing up to \$25 dollars per month per employee upon submission of proof of payment.

Attachment

GUIDELINES FOR SPENDING AND DOCUMENTING THE USE OF GRANT FUNDS

- **Grant funds may not be spent on food or drink.** This includes groceries, restaurants, or other food/drink vendors. The only exceptions are as follows:
 - Classes about nutrition and healthy cooking will be allowed. Food purchased for use in the class (i.e., to cook the demonstration meal with or as examples of nutritious food) may be purchased with grant dollars. However, any other food brought into the class (i.e., breakfast or lunch) must be purchased outside of grant dollars.
 - Restaurant/food/grocery gift cards given as a prize for participating in a fitness or weight loss challenge.
 - Produce delivery for employees (e.g., The Fruit Guys, Farm Fresh to You)
- **Gift Cards - Guidelines**
 - Gift cards should not be the core of your wellness program. They cannot be used as a fitness stipend. They may be used only to supplement a well-rounded wellness campaign.
 - If given as a prize for participating in or winning a fitness or weight loss challenge, then there is no restriction on the type of gift card that may be purchased.
 - If not tied to a fitness or weight loss challenge, then the gift card must be fitness-related. Examples include – yoga or other fitness studios or classes, sporting goods stores like Dicks, Big 5 or REI, athletic shoe or fitness apparel stores like Athleta, Adidas, Merrell, Nike, Under Armour, etc.
- **Safety equipment, services, and training** are not considered eligible wellness grant expenses.
- **Teambuilding** events, while worthwhile, are not considered eligible wellness grant expenses.

Please see the following page for more information on the rules for a Wellness Stipend.

Please save your receipts for your purchases. Receipts must show full details of what was purchased. Once you have used the funds, submit them to [Michele Dye](#) at JPIA. All funds must be used and receipts submitted by **Monday, June 21, 2027.**

Wellness Stipend

Purpose

A Wellness Stipend supports employee health and well-being by reimbursing eligible fitness and wellness expenses in accordance with the Wellness Grant Spending Guidelines. All expenses must be wellness-focused, reasonable, and properly documented.

✓ Approved Wellness Stipend Expenses

- Athletic Footwear – running, walking, or cross-training shoes (athletic shoes are allowed; apparel is excluded)
- Wellness & Fitness Equipment – dumbbells, resistance bands, yoga mats, weight racks
- Exercise & Movement Machines – treadmills, stationary bikes, rowing machines
- Wellness & Fitness Classes – yoga, Pilates, spin, mindfulness-based movement classes
- Sporting Goods – fitness-related equipment and accessories (see excluded items under Not Approved)
- Massage Therapy (Chair Massage) – short-duration, wellness-focused services
- Sun-Protection & Hydration Items – wide-brim hats, sunscreen, cooling neck wraps, reusable water bottles
- Employee Assistance Program (EAP) – ACWA JPIA Anthem EAP premium costs, if applicable
- Fitness-Related Gift Cards – athletic or sporting goods retailers

✗ Not Approved Wellness Stipend Expenses

- Athletic Clothing / Apparel
- Food & Beverages
- Restaurant or Grocery Gift Cards (unless part of a fitness or weight-loss challenge)
- General Gift Cards (Amazon, Target, Visa, etc.)
- Safety Equipment or PPE
- Team-Building or Social Events
- Cash or Cash Equivalents
- Any Expense Without a Receipt
- Excluded Sporting Goods Items – skateboards, snowboards, bike racks, or similar items

Important Reminders: Receipts required • Wellness-focused expenses only • All reimbursements subject to ACWA JPIA review