

**SERVICE REVIEW AND SPHERE OF INFLUENCE UPDATE  
FOR SANITARY SEWER SERVICES  
IN SAN JOAQUIN COUNTY**

**Woodbridge Sanitary District  
County Service Area No. 31 – Saddle City  
Pacific Gardens Sanitary Sewer District  
Country Club Sanitary District**

**Prepared by  
SAN JOAQUIN LOCAL AGENCY FORMATION COMMISSION**

**May 15, 2009**

## TABLE OF CONTENTS

	Page
EXECUTIVE SUMMARY.....	1
A. Service Review Written Determinations	1
B. Sphere of Influence Written Determinations	3
SECTION 1. INTRODUCTION.....	7
A. Municipal Service Review.....	7
B. Spheres of Influence .....	8
C. California Environmental Quality Act.....	8
D. Special Districts.....	9
SECTION 2. SANITARY SEWER SERVICE IN SAN JOAQUIN COUNTY	10
A. Woodbridge Sanitary District.....	10
B. County Service Area No. 31-Saddle City.....	12
C. Pacific Gardens Sanitary Sewer District.....	12
D. Country Club Sanitary District.....	15
SECTION 3. MUNICIPAL SERVICE REVIEW.....	17
A. Growth and Population Projections.....	17
B. Present and Planned Capacity of Public Facilities and Adequacy of Public Services including Infrastructure Needs and Deficiencies.....	19
C. Financial Ability of the Districts to Provide Services.....	22
D. Status of, and Opportunities for Shared Facilities.....	25
E. Accountability of Community Service Needs, Including Government Structure and Operational Efficiencies.....	26
SECTION 4. SPHERES OF INFLUENCE.....	28
A. Present and Planned Land Uses in the Area, including Agricultural and Open Spaced Lands.....	29
B. Present and Probable Need for Public Facilities and Services in the Area.....	30
C. Present Capacity of Public Facilities and Adequacy of Public Service Provided.....	31
D. Existence of Any Social or Economic Communities of Interest in the Area.....	32
FIGURES	
1. Woodbridge Sanitary District Vicinity Map.....	11
2. County Service Area No. 31 – Saddle City Vicinity Map.....	13
3. Pacific Gardens Sanitary Sewer District Vicinity Map.....	14
4. Country Club Sanitary District Vicinity Map.....	16

## EXECUTIVE SUMMARY

One of the key responsibilities of a Local Agency Formation Commission (LAFCo) is to determine the sphere of influence of local governmental agencies. A sphere of influence (SOI) designates the probable physical boundary and service area of a local agency. The 2000 Cortese-Knox-Hertzberg Act requires the Local Agency Formation Commission to prepare a municipal service review prior to or concurrent with an update of an SOI. The service review evaluates existing and future service conditions and reviews the advantages and disadvantages of various governmental service structure options in the form of written determinations. A service review provides information upon which LAFCo can base its action on determining a sphere boundary for an agency.

This Service Review and Sphere of Influence Plan have been prepared for special districts providing sanitary sewer services in the northwestern quadrant of San Joaquin County. They include Woodbridge Sanitary District (WSD), County Service Area No. 31-Saddle City (CSA 31), Pacific Gardens Sanitary Sewer District (Pacific Gardens) and Country Club Sanitary District (Country Club).

### A. Service Review Written Determinations

In accordance with the Cortese-Knox-Hertzberg Act, the service review addresses five categories for which LAFCO must render written determinations pursuant to California Government Code §56430. Based on the information contained in the service review, the written determinations for the sanitary sewer districts are as follows:

#### 1. Growth and Population Projections

The four special districts provide sanitary sewer services for unincorporated areas in San Joaquin County. Pacific Gardens and Country Club are located in an unincorporated island surrounded by the City of Stockton and the districts are predominately built-out except for a few scattered vacant parcels. Woodbridge Sanitary Sewer serves development south of the Mokelumne River where little or no population growth is expected. The District does not plan on serving additional areas outside its district boundaries. County Service Area No. 31 provides service to properties designated for highway and freeway services. Additional commercial development is planned on existing vacant parcels within the district.

#### 2. Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

The present sewer service demand within each District can be met with existing facilities and infrastructure. Limited growth patterns within the Woodbridge, Pacific Gardens and Country Club boundaries will not require additional capacity or upgrades for the infrastructure. Wastewater treatment is provided by the City of Stockton for Pacific Gardens and Country Club by contract while the Districts are responsible for the maintenance of the sewer infrastructure. The City has considered these unincorporated pockets within their Urban Service Boundary for which services and facilities are planned. The Woodbridge Sanitary District is currently below

capacity. CSA 31 recently resolved permit and regulatory compliance issues by obtaining additional wastewater discharge capacity through an agreement with the City of Lodi. Additional capacity for the CSA is available upon negotiation of a new tax sharing agreement with the City of Lodi.

The infrastructure for the Woodbridge, Pacific Gardens and Country Club sewer districts are aging, being built in the 1950's. The County Public Works is conducting an infrastructure study to determine the systems needs and deficiencies for Pacific Gardens. Country Club and Woodbridge has recognized its aging system and has implemented a financial plan to increase its reserve base to pay for major repairs. Service levels for all districts appear to be adequate to meet current needs, and facility and financing plan procedures are in place to address future conditions.

### 3. Financial ability of the districts to provide services

Each of the sanitary sewer districts faces unique limitations in their ability to collect revenues to provide service. Three districts, Woodbridge, CSA 31 and Pacific Gardens, receive revenues from user fees or service charges assessed on benefiting properties, which are collectable with annual property tax statements. Service charges are based on a single-family dwelling equivalent. The commercial properties within CSA 31 are converted to single-family dwelling equivalents based on special study by the County Public Works Department. The assessments are subject to the provisions of Proposition 218 and require an Engineer's Report to demonstrate the fee level and a majority voter approval. The Country Club Sanitary District levies a special tax assessment, which had received two-thirds majority approval in 2002 in an election ballot. With the exception of CSA 31, the districts also receive property tax revenues and interest.

Revenues for CSA 31 are generated from user fees, interest, and bond financing. The district faces a major challenge to generate sufficient revenues to maintain and operate its sewer system due to the small user base of 14 users. The CSA recently faced a challenge of obtaining adequate funding to resolve Regional Water Quality Control Board violations. It was estimated that \$10 million was needed to upgrade the district's sewer treatment plant to comply with regulatory requirements. The District obtained long-term bond financing and a low interest loan from the County General Fund for the financing of the extension of a pipeline to the City of Lodi's wastewater treatment plant. This financing mechanism provided a viable solution to bring the District into compliance.

### 4. Status of, and opportunities for shared facilities

Given the narrow range of services provided, geographic locations, and generally limited facilities, opportunities for shared facilities are limited. The sewer collection systems for each of the sewer districts have been designed to serve the district's service area. The districts maintain the sewer collection systems while wastewater treatment is provided by either Stockton or Lodi. Sewer treatment capacities for the districts are limited by agreements in place.



5. Accountability for community service needs, including governmental structure and operational efficiencies

Alternatives to the government structure for special districts are limited given their relatively small size and the limited class of services they provide. In general, dependent districts can be reorganized as independent agencies, consolidated with other districts, merged with cities or dissolved. If a dependent district chose to reorganize as an independent agency, it would be required to provide its own management.

The community of Woodbridge is serviced by several special districts providing limited services. Consolidation of all single purpose special districts to one multipurpose district has been considered in the past but a full study has not been pursued. Based on the current provision of sewer service by the existing structure, it is reasonable to conclude that sewer service can continue to be provided by the District at this time.

Pacific Gardens and Country Club Sanitary Districts are located in unincorporated islands within the City of Stockton sphere. The Commission recently approved Sphere of Influence Policies that address Districts within City spheres. The policy states: "LAFCo shall encourage districts and cities to develop plans for the orderly detachment, merger/dissolution of a district when districts have significant territory within a proposed city's sphere of influence". In July 2008 upon approval of the City of Stockton's sphere plan, the Commission received the City of Stockton's commitment to annex unincorporated islands. The feasibility of annexation of this large island and the dissolving of the two sanitary districts should be studied further.

### **B. Sphere of Influence Written Determinations**

Based upon the service review and the written determinations, the following type of sphere is recommended for the district:

<b>Special District</b>	<b>Sphere of Influence</b>
Woodbridge Sanitary District	Coterminous
County Service Area No. 31	Coterminous
Pacific Gardens Sanitary Sewer District	Zero
Country Club Sanitary District	Zero

The following determinations for the District's Sphere of Influence are made in conformance with Government Code section 56425 and Commission policy.

1. Present and planned land uses in the area, including agricultural and open-space lands

#### Woodbridge Sanitary District

Land uses in the Woodbridge community include 292 acres for housing, 43 acres of public land, 7 acres of commercial uses, and 189 acres of permanent open space (a golf course and cemetery). Residential units are varied with single-family homes on smaller lots built within the original townsite of Woodbridge and larger estate homes found north of the Mokelumne River and along

the fairways of the Woodbridge Golf and Country Club. The community also consists of three mobile home parks located along Lower Sacramento Road. The District does not have authority to make land use decisions, nor does it have authority over present or planned land uses within its boundaries. The responsibility for land use decisions is retained by San Joaquin County. The District does not plan to serve any other area outside its current service boundary.

#### County Service Area No. 31

CSA 31 encompasses 108.2 acres including streets and Highway 12. Land uses for CSA 31 are restricted to Highway Services. In 1983, the LAFCo Commission adopted a coterminous sphere for the CSA. The County Public Works Department indicates there are no other areas that the CSA desires or plans to serve that are not now within its service boundary.

The Agreement between the City of Lodi and County specifically included clauses to ensure that land uses affecting the CSA promote the goals of Lodi and County general plans, including compact land use and development, and that discourages "leap frog development" and "urban sprawl". The District agreed to not expand the service area boundary in a manner that would result in the need for additional City sewer capacity without first obtaining written consent of the City.

#### Pacific Gardens Sanitary Sewer District

The Pacific Gardens Sanitary District encompasses approximately 700 acres and consists of predominately residential, both single and multi-family units and some commercial. The District is nearly built-out and the District cannot expand its service or sphere boundaries outward because it is bounded by the Stockton city limits, the Country Club Sanitary District, and the Stockton Channel on the west.

#### Country Club Sanitary District

The Country Club Sanitary District encompasses approximately 225 acres most of which are single-family homes, multi-family complexes and commercial properties and is predominately built-out. The existing sphere of influence boundary is the same as the District's service boundary. The District cannot expand its service or sphere boundaries because the District is bounded by the Stockton city limits on the south and east and the Pacific Gardens Sanitary Sewer District to the north and west.

## 2. Present and probable need for public facilities and services in the area

#### Woodbridge Sanitary District

At the present time, the District has both the ability and the capacity to serve its service area. The District's present and probable need for facilities and services in the area is not expected to change. Although the District is also within the City of Lodi's sphere of influence, the City does not plan on annexing territory in the Woodbridge community; therefore there is no other provider of sewer service in the community.

### County Service Area No. 31

With the agreement between the County and City of Lodi for sewer treatment and disposal, the District is meeting the sewer needs of its customers within the existing service area boundary. The future need for public facilities and services for the District area are limited due to the sewer treatment and disposal capacity limitations provided for under the City and County agreement.

### Pacific Gardens Sanitary Sewer District

The District is presently meeting the sanitary sewer needs for its customers within its existing service boundary. The sewer collection system was designed to serve customers within the District boundary. The District is currently 99% built out and the District cannot expand its boundaries as it is surrounded by other jurisdictions.

### Country Club Sanitary District

The District was formed in 1951 to provide sewer collection and conveyance to the unincorporated area known as the Country Club area. The district maintains 33,000 linear feet of sewer collection and transmission facilities that were constructed to serve the district service area only. There are currently 12 vacant parcels within the district and the district can provide service when needed. The District cannot expand its boundaries.

3. Present capacity of public facilities and adequacy of public services provided including infrastructure needs and deficiencies

### Woodbridge Sanitary District

At the present time the District has excess sewer capacity, however, it does not anticipate serving areas outside its district boundary.

### County Service Area No. 31

CSA 31 receives sewer treatment and disposal of wastewater services from the City of Lodi. Under the agreement the CSA is limited to 0.19 (MGD) million gallons daily of the City's wastewater plant's 8.5 MGDs capacity with the potential to expand up to and not to exceed 0.21 MGD unless a new tax sharing agreement is negotiated. The current usage for the CSA is 0.11 MGDs with .08 MGD capacity remaining.

### Pacific Gardens Sanitary Sewer District

The sewer collection infrastructure for the District is adequate to meet the needs for its customers within its existing service area boundary. Sewer treatment service is provided by the City of Stockton by a 1976 agreement that provides the terms, conditions and compensation for the service. Prior to connection for service, the City makes the determination if adequate sewer treatment capacity exists. There are approximately 2,489 single-family equivalent connections to the system.

### Country Club Sanitary District

The District relies on the City of Stockton to provide treatment and disposal of wastewater generated within the District's service area. Sufficient capacity is available to the District to support current needs and build-out of the District, which includes 12 vacant parcels. In prior years, the District relied on property tax revenues, which were inadequate to maintain the sewer collection system. In December 2002, the District was successful in levying a special tax that provided additional revenues for maintenance of the sewer system. The additional revenue allows the District to keep up with the costs of repairs and build up reserves, increasing the quality of service for its customers.

4. Existence of any social or economic communities of interest in the area

### Woodbridge Sanitary District

The Woodbridge Sanitary District is within the sphere of influence of the City of Lodi. The City has expressed no desire to provide services to the Woodbridge community as stated in Lodi's current Municipal Service Review and the residents of the community has expressed a desire to remain independent of the City.

### County Service Area No. 31

The City of Lodi maintains an interest within CSA 31 as it relates to future development. In negotiating the agreement for sanitary sewer treatment services, both the City and County agreed to terms as it relates to future development of the service area.

### Pacific Gardens Sanitary Sewer District

The Pacific Gardens Sanitary Sewer District is an unincorporated island surrounded by the City of Stockton. The island is included within the City's sphere of influence and urban service boundary. The City has stated in its municipal service review and sphere update approved in August 2008 that it is committed to annexing its unincorporated islands.

### Country Club Sanitary District

The Country Club Sanitary District is an unincorporated island surrounded by the City of Stockton. The island is included within the City's sphere of influence and urban service boundary. The City has stated in its municipal service review and sphere update approved in August 2008 that it is committed to annexing its unincorporated islands.

## SECTION 1. INTRODUCTION

### A. Municipal Service Review

The following report is a service review of sanitary sewer services provided by special districts in designated unincorporated areas in the northwest quadrant of San Joaquin County. The special districts subject to this municipal service review include the Woodbridge Sanitary District, County Service Area No. 31-Saddle City, Pacific Gardens Sanitary Sewer District, and the Country Club Sanitary District.

The service review was prepared in accordance with Section 56430 of the California Government Code, which was enacted by the Cortese-Knox-Hertzberg Reorganization Act of 2000. LAFCo is now required to conduct reviews for all cities and special districts that provide municipal services to county residents. The term “municipal services” generally refers to the full range of services that a public agency provides or is authorized to provide including police, fire, sanitary sewer, water and storm drainage services. Service reviews should be completed in conjunction with the mandated five-year schedule for updating Spheres of Influence (SOI). San Joaquin LAFCo is currently undergoing efforts to conduct municipal service reviews and update spheres for cities and special districts.

The municipal service review should evaluate the services provided by the local agency, and if necessary, make recommendations to promote the efficient provision of those services. Service reviews are intended to serve as a tool to help LAFCo, the public and other agencies better understand the public service structure and evaluate options for providing efficient and effective public services. LAFCos are required to make written determinations regarding the service review. Statements of determinations will be made in the following areas of review:

1. Growth and population projections for the affected area
2. Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies
3. Financing ability of agencies to provide services
4. Status of, and opportunities for shared facilities
5. Accountability for community service needs, including governmental structure and operational efficiencies

To initiate the service review process, LAFCo mailed out a questionnaire requesting data to address the above five determination categories. In addition, staff visited and met with district staff for additional information not fully covered by the questionnaire. Finally, a preliminary draft report was forwarded to the agency for their comment and review.

The finalization of the MSR report is a two-step process. Because LAFCo policy encourages the involvement of agencies, the public, and other stakeholders in development of the service review report, a draft MSR report is presented at a meeting/workshop with the Commission to provide an opportunity for soliciting comments from the public and LAFCo Commissioners prior to finalizing the document. The final draft report is then made available during a noticed 21-day comment period prior to final consideration by the Commission at a public hearing.

## **B. Spheres of Influence**

In conjunction with the requirement to conduct Municipal Service Reviews, the Cortese-Knox-Hertzberg Act obligates LAFCo to review and update, as necessary, spheres of influence for each local agency within LAFCo's jurisdiction. Defined as a plan for the probable physical boundaries and service area of a local governmental agency, a sphere is considered to be a planning tool that is designed to provide guidance in reviewing proposals, promoting the efficient and effective provision of municipal services, and preventing duplication of service responsibility. LAFCo is responsible for determining that an agency is reasonably capable of providing needed resources and basic infrastructure to serve areas within the agency's boundaries and sphere.

In determining a sphere, the Commission is required to consider specific factors and make written determinations related to:

1. Present and planned land uses in the area, including agricultural and open space lands;
2. Present and probable need for public facilities and services in the area;
3. Present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide; and
4. Existence of any social and economic community of interest in the area.

In September 2007, the Commission adopted Sphere of Influence policies and procedures. In addition to spheres that generally apply to cities, the Commission adopted other types of spheres that may be applied to special districts. They include the following:

1. A special district that provides services, which ultimately will be provided by another agency, will be assigned a zero sphere.
2. If additional information is necessary to determine a sphere boundary, but is currently unavailable, a partial sphere may be approved and a special study area may be designated.
3. A local agency may be allocated a coterminous sphere if there is no anticipated need for the agency's services outside its existing boundaries, or if there is insufficient information to support inclusion of areas outside the agency's boundaries in the sphere of influence.

## **C. California Environmental Quality Act**

1. **Municipal Service Review**  
LAFCo is the lead agency under CEQA for a municipal service review. The municipal service review is an informational document to be used for future actions that LAFCo has not yet approved, adopted or funded. It is, therefore, considered Categorical Exempt from the California Environmental Quality Act (CEQA) pursuant to Section 15262 of the CEQA Guidelines. A Notice of Exemption pursuant to CEQA will be prepared and filed for this report.
2. **Spheres of Influence**



LAFCo is the lead agency under CEQA for sphere of influence reviews. The review of sanitary sewer districts SOI boundaries concluded that no change in boundary should occur and is exempt from CEQA. A Notice of Exemption pursuant to CEQA will be prepared for the SOI review.

#### **D. Background on Special Districts**

San Joaquin County has 202 independent and dependent special districts. Fifty-nine of these districts are maintenance and lighting districts that do not require a sphere of influence; therefore, do not fall under the provisions of the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000. A service review of maintenance and lighting districts may be included in a service review but is not required.

Special districts are defined as “any agency of the state for the local performance of governmental or proprietary functions within limited boundaries” (GC § 16271). Special districts are formed when residents or landowners want new services or higher level of services and are willing to pay for them.

Special districts can be formed under a principal act or a special act. A principle act is the law under which the district was formed such as the fire protection district act or community services district act. In certain cases, the State Legislature may create a special act in order to form a district specifically tailored to meet the needs of a specific area not permitted under the a principle act. The Mountain House Community Services District is an example of a special district formed by special legislation. The district was formed under the Community Services District principal act but was prescribed additional purposes and powers under Senate Bill 1397 which authorized the district the ability to provide flood control prevention, water conservation measures, and other services.

The enabling law for sanitation districts is located within Sections 4700-4859 of the Health and Safety Code known as the County Sanitation District Act. According to the act, the governing body of a sanitation district is composed of a board of directors of not less than three members.

The make-up of the special district board of directors determines whether a special district is an independent or dependent special district. Independent districts have appointed boards of directors serving for fixed terms. Dependent special districts are governed by other, existing bodies (either a city council or a county board of supervisors). The Country Club Sanitary District and Woodbridge Sanitary District’s are independent special districts. The Pacific Gardens Sanitary Sewer District and County Service Area No. 31 are dependent special districts because the County Board of Supervisors serves as the Board of Directors. These two special districts are administered by the County Department of Public Works.

In addition to providing sewage collection, treatment, and disposal, State Law enables county sanitation districts to provide additional services such as refuse transfer or disposal, street cleaning, and water services. The Woodbridge Sanitary District provides solid waste collection and disposal services by agreement with CA-Waste. The provision of solid waste services will not be evaluated in this municipal service review.



## SECTION 2: SANITARY SEWER SERVICES IN SAN JOAQUIN COUNTY

### A. Woodbridge Sanitary District

The Woodbridge Sanitary District (WSD) was formed on May 11, 1949 as an independent special district under the County Sanitation District Act (Health & Safety Code, Section 4700). The District is governed by five Board of Directors that are elected to four-year terms. The District currently employs seven part-time employees including a General Manager, Secretary, and Maintenance/Laborers.

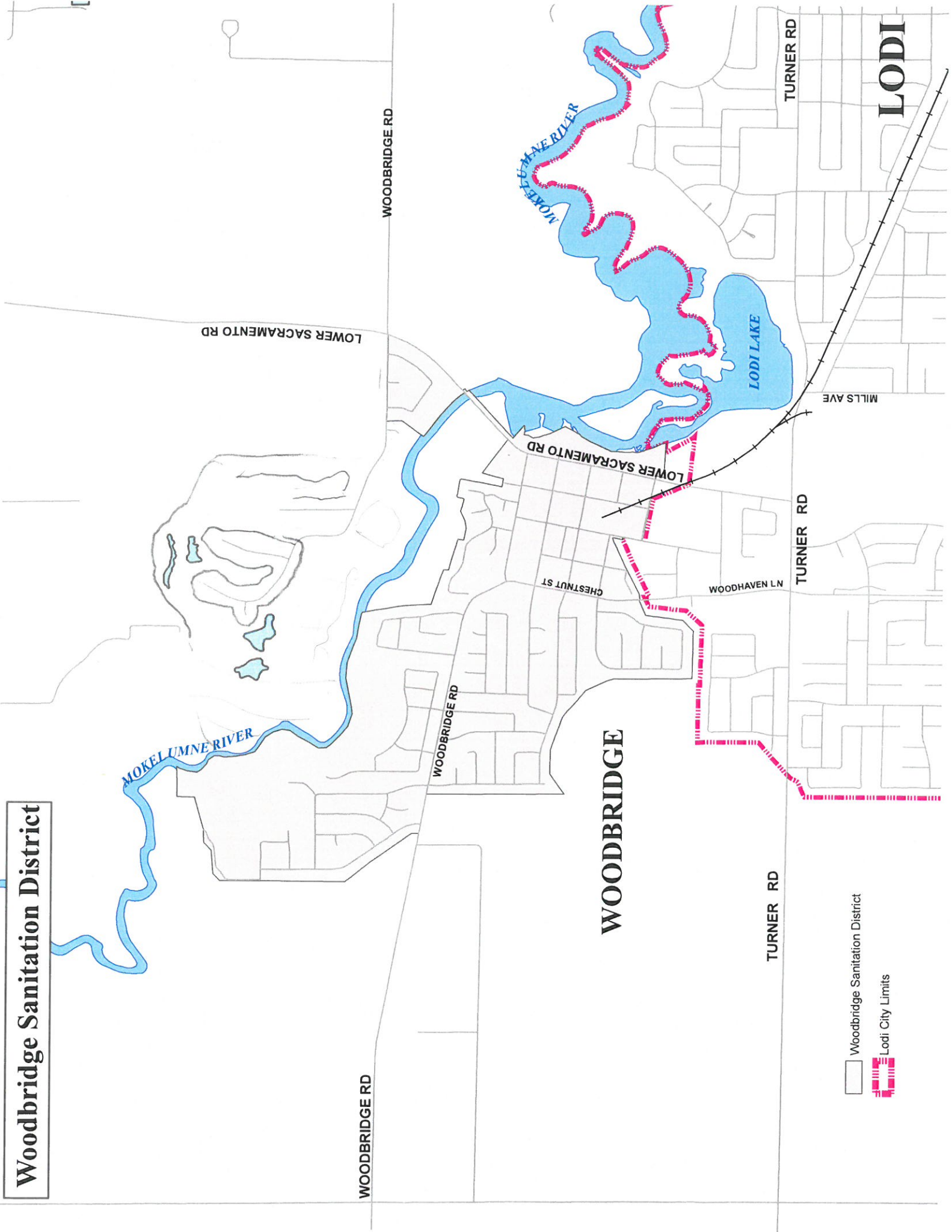
The District is located within the Woodbridge Community, northwest of the City of Lodi and south of the Mokelumne River. Wastewater in most of the Woodbridge Community is collected and treated by WSD. The remainder of the community, particularly the area north of the Mokelumne River, is served by individual septic tanks and leach fields. The District operates a sewage treatment plant consisting of a percolation/evaporation pond system. The agency's boundary consists of 188 acres and the District serves approximately 3,500 people. A map of the District's existing boundary is shown in Figure 1.

In 1973, the Commission adopted a "Zero Sphere of Influence" for the WSD along with four<sup>1</sup> other special districts located within the Woodbridge community and within the sphere of influence for the City of Lodi. In conjunction with adopting a zero sphere for WSD, the LAFCo Commission ordered that a Reorganization Study Committee investigate a planned approach to the provision of services within the Woodbridge community area. The study concluded that the Woodbridge community should annex into the City of Lodi. The citizens of Woodbridge have expressed opposition to annexation and the City of Lodi's General Plan does not include plans to provide service to this area. The current sphere designation for WSD is a "zero sphere".

---

1 The four other districts include: Augusta Street Lighting Maintenance District, Country Club Vista Improvement and Street Lighting Maintenance District, Kirst Estates Maintenance District, and Mokelumne Acres Maintenance District.

# Woodbridge Sanitation District



- Woodbridge Sanitation District
- Lodi City Limits

## **B. County Service Area No. 31-Saddle City**

County Service Area No. 31-Saddle City (CSA 31) was formed on October 13, 1981. CSA 31 is a dependent special district formed under Government Code Section 25210.1 known as the County Service Area Law. Because the District is a dependent special district, the San Joaquin Board of Supervisors serve as the Board of Directors. The San Joaquin County Public Works Department provides administrative services and operates and maintains the sewer system.

The district was formed by petition of property owners desiring services for an area of 52 acres located at the intersection of I-5 and Highway 12, at the southeast corner of Thornton Road and Highway 12. The area was designated for highway service under the General Plan and was planned for a combination of highway commercial and commercial recreational uses. LAFCO approved the formation of CSA 31 and authorized the district to provide water, sewer, storm drainage, and street lighting services. Since 1982, CSA 31 has annexed additional properties to the district and the district boundary is currently over 108 acres.

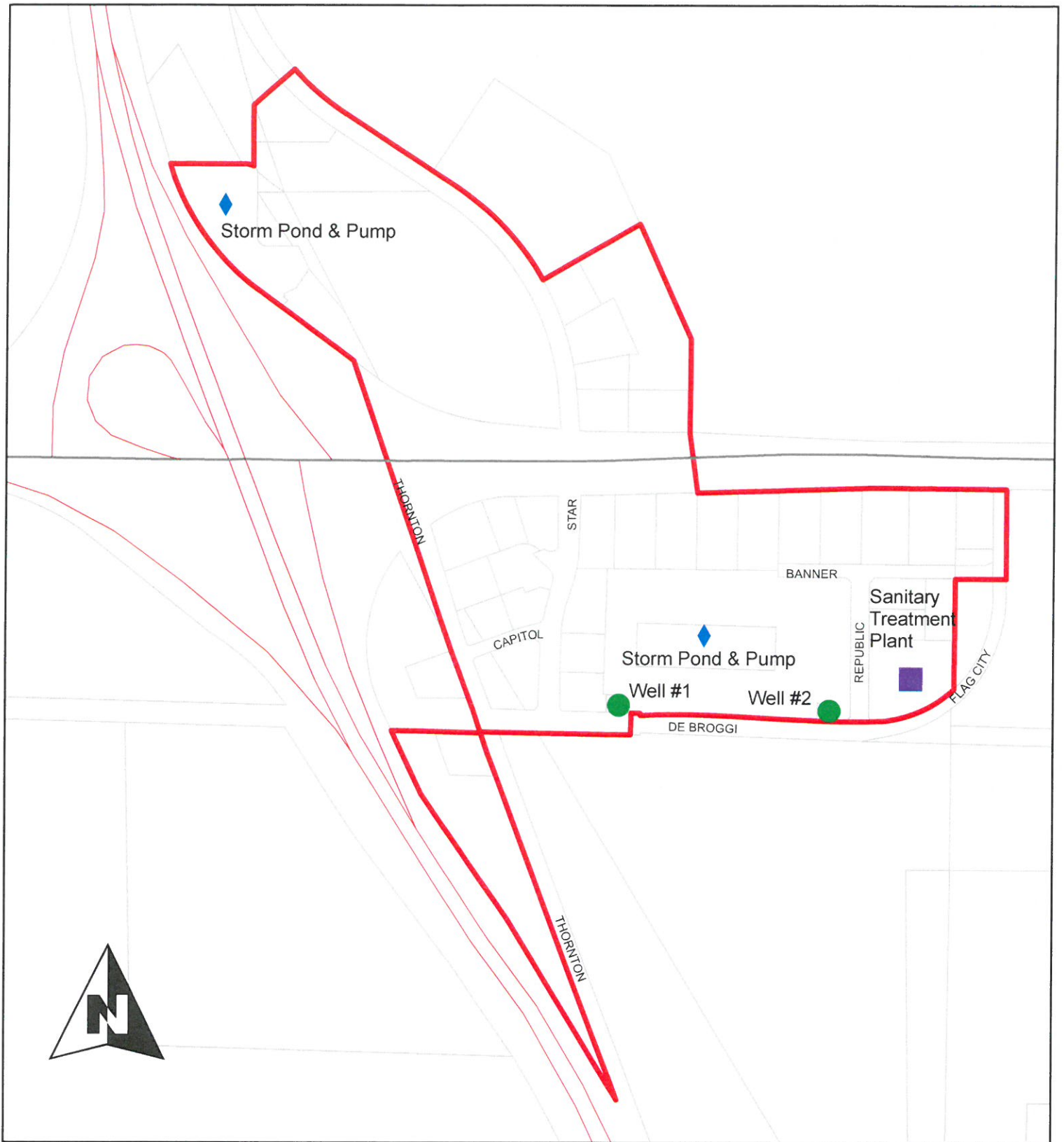
A sphere of influence was adopted for the district in 1983. Consideration was given to adopt a sphere boundary larger than the district boundary as other property owners were interested in developing additional commercial sites adjacent to the district. However, at the time of adoption of the sphere, the original developers had not completed their final subdivision map and the authorized services for the district had not been utilized. The Commission determined that adoption of a sphere boundary larger than the district boundary would be premature, therefore adopted a sphere boundary that was coterminous with service boundary. Subsequent to the District's formation ten annexations have occurred and the sphere boundary amended. A map of CSA 31's existing boundary is shown in Figure 2.

## **C. Pacific Gardens Sanitary Sewer District**

The Pacific Gardens Sanitary Sewer District (Pacific Gardens) is a dependent special district formed on June 30, 1947 under the County Sanitation District Act (Health & Safety Code, Section 4700). The District is a dependent special district and the San Joaquin Board of Supervisors serves as the Board of Directors.

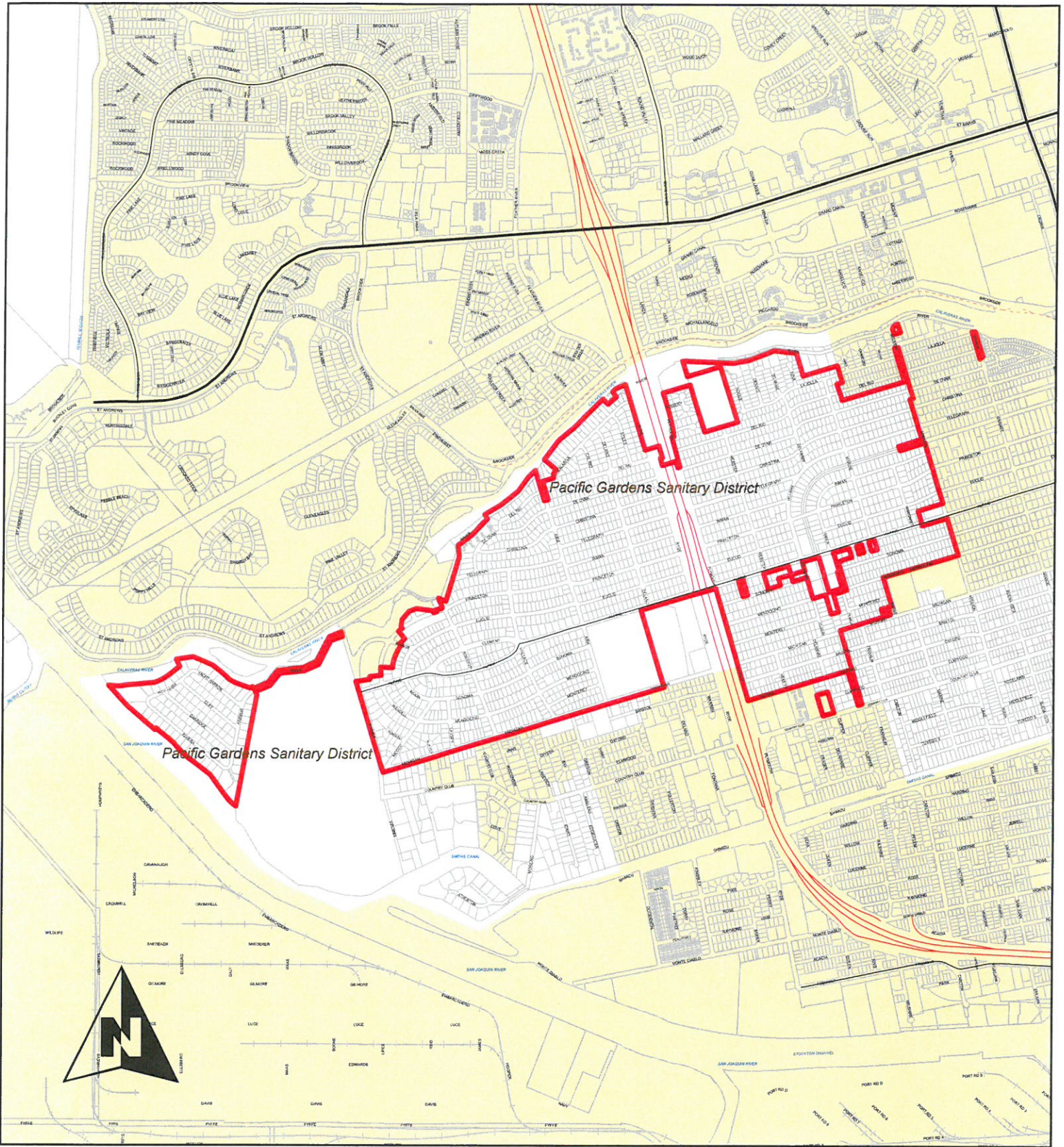
Pacific Gardens provides maintenance and operation of the sanitary sewer collection system for the area. Maintenance work is provided by the County's Public Works Utilities Division. Collected wastewater is transmitted and treated at the City of Stockton Waste Water Treatment Plant on Navy Drive, south Stockton.

Pacific Gardens is located within the Country Club-Pacific Gardens unincorporated island in the central western area of the City of Stockton. The District is bounded by the Calaveras River to the north, Michigan Avenue to the south, Mission Avenue on the east and the Country Club Golf Club on the west. The District also serves the Riviera Cliffs subdivision located between the Country Club Golf Club and the Stockton Deep Water Channel. The current size of the District service area is 700 acres and it serves approximately 6,995 residents. A zero sphere of influence was approved in 1973 for the District because it provides a competing urban service within the sphere of influence for the City of Stockton. A map of the District's existing boundary is shown in Figure 3.



# County of San Joaquin CSA NO. 31 - FLAG CITY





# County of San Joaquin PACIFIC GARDENS SANITARY DISTRICT



Pacific Gardens Sanitary District

January 2008



#### **D. Country Club Sanitary District**

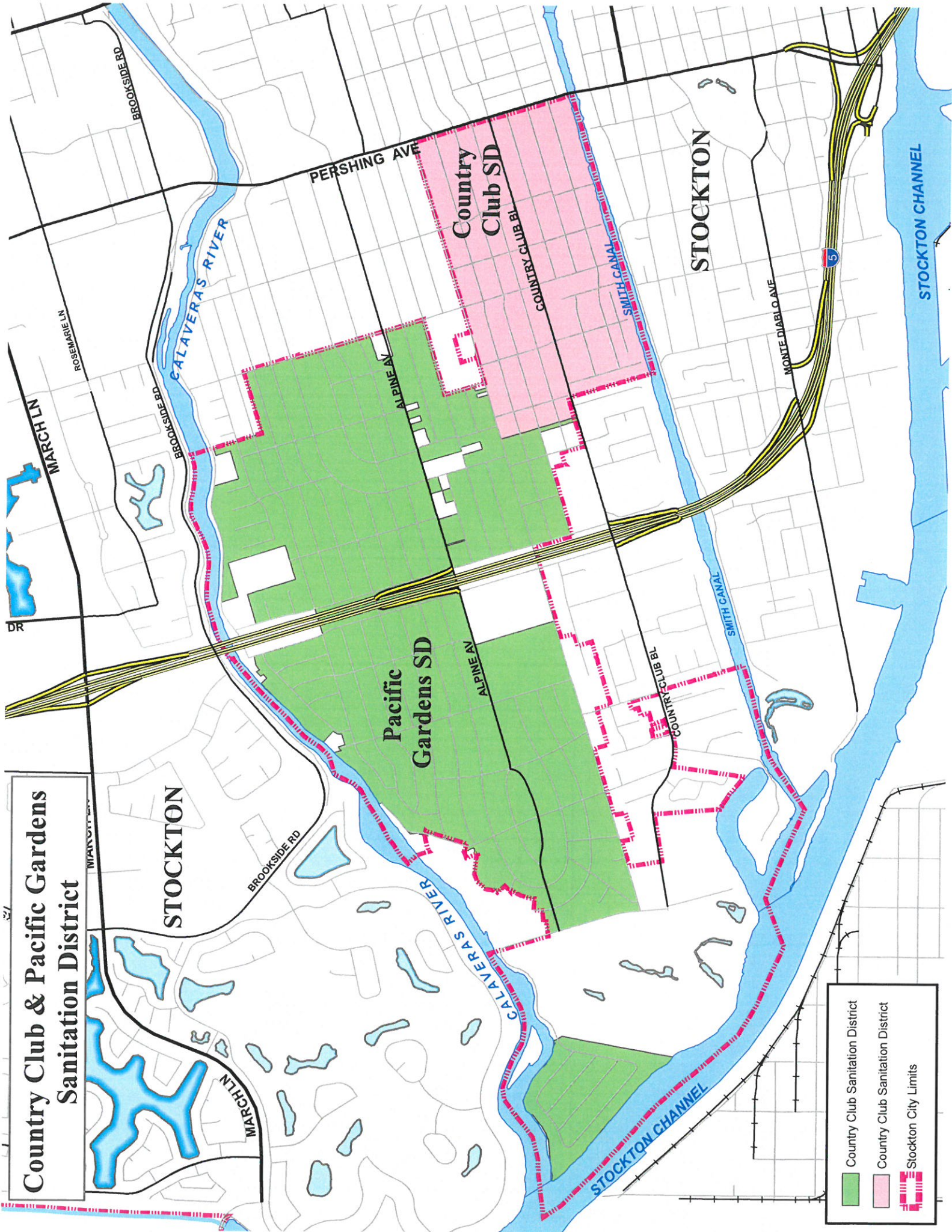
The Country Club Sanitary District is an independent special district formed on July 9, 1951 under the County Sanitation District Act (Health & Safety Code, Section 4700). The district is governed by five Board of Directors elected to four-year terms.

The district is located within the Country Club-Pacific Gardens unincorporated island surrounded by the City of Stockton. The District is bounded by the Smith's Canal on the south, Michigan Avenue on the north, Pershing Avenue on the East and the Western Pacific Railroad right-of-way on the west. The Country Club Sanitary District boundary encompasses approximately 225 acres. A map of the district's existing boundary is shown in Figure 4.

The Country Club Sanitary District is responsible for maintaining the sewer infrastructure within its district boundaries. Property owners are responsible for the maintenance of their service lines (laterals) from their building up to the main line. Sewage collection and treatment for the Country Club area is provided by contract with the City of Stockton at the Regional Waste Water Treatment Plant on Navy Drive, south Stockton. The District does not have any employees and hires contractors to provide administration services and to maintain and repair the district's sewer infrastructure.

In 1973, the Commission adopted a "Zero Sphere of Influence" for the Country Club Sanitary District along with 47 other dependent and independent special districts that provided competing urban services within the sphere of influence for the City of Stockton. The Commission adopted a "zero SOI" for the District because of location and possible duplication of service. The Commission further recommended that a Reorganization Committee, comprised of special districts, be set up to study projected urban service needs, study capacity and the current state of existing facilities, and to recommend a planned approach to providing services adjacent to the Stockton area. Generally, the study cited several problems in providing urban services through special districts in unincorporated areas including inefficient and costly service delivery, pocket areas block the orderly extension of city services, and that the tax revenue base for the district's continue to shrink upon annexation of areas into cities making it difficult to maintain facilities and provide service. The study recommended concerted support for annexation in the Stockton area, tighter controls in forming new districts, evaluation of governmental impact when development is approved, and the development of water and sewer plans prior to development.

# Country Club & Pacific Gardens Sanitation District



- Country Club Sanitation District
- Country Club Sanitation District
- Stockton City Limits



## SECTION 3. MUNICIPAL SERVICE REVIEW

The purpose and objective of Municipal Service Reviews is to develop recommendations that will promote more efficient and higher quality service patterns; identify areas for service improvement; and assess the adequacy of service provision. The Cortese-Knox-Hertzberg Act requires LAFCo to make written statements of determinations regarding the agency's ability to provide services. This section will provide a brief description and standard for which the agency and the service it provides will be reviewed followed by written statements of determinations.

### 1: GROWTH AND POPULATION PROJECTIONS

*The need for, and patterns of service provision should be determined by existing and anticipated growth patterns and population projections. This analysis will be used to determine whether the sphere boundaries reflect expected growth boundaries.*

#### A. Woodbridge Sanitary District

The Woodbridge Sanitary District (WSD) serves the Woodbridge community, which is predominately residential. The community can be described as a suburb of the City of Lodi, which is located to the southeast of Woodbridge. In the early 1980's, due to development restrictions by voters to "infill" projects only within the City of Lodi, residential growth boomed in Woodbridge. In the past, residents of Woodbridge have expressed a desire to remain independent from the City of Lodi.

WSD serves an area where little growth may occur but is not expected in the near future. The district's service area is approximately 188 acres. Currently there are no pending or proposed development plans within or in the surrounding areas, the last annexation of Winwood Estates occurring in 2006. There are approximately 1,340 parcels within the District boundaries with a population of about 3,500 residents. The District reports that there are currently 1,251 connections to the District facilities. In response to staff's question on whether there were other areas outside of the boundary that the agency plans to serve, WSD responded that the existing district boundaries are correct and there are no plans to serve additional areas.

The Commission adopted a zero sphere boundary for WSD in 1973 as the district is also within the sphere of influence for the City of Lodi. In January 2008 the Commission reaffirmed the existing sphere for the City of Lodi, which included the community of Woodbridge. In its sphere plan, the City indicated that it had no intention of providing services or to annex the Woodbridge community area, and included the area within the sphere as a means to reserve the City's right to comment on land uses for the area.

#### B. County Service Area No. 31

County Service Area No. 31 (CSA 31) encompasses an area of 108.20 acres. The general plan designation for properties within the district is commercial and freeway service land uses that include gasoline service stations, food and beverage sales, eating and drinking establishments, and hotels and motels. There are two development proposals being planned at this time but

development will be on vacant property already within the CSA. Currently, there are no development plans for lands in vicinity of the district that may need services. The CSA requires a design for expansion of facilities or an engineer's report showing that the existing facility has sufficient capacity to serve the property before a property can annex. The current sphere of influence for CSA 31 is coterminous with its service boundary.

### **C. Pacific Gardens Sanitary Sewer District**

Pacific Gardens Sanitary Sewer District (Pacific Gardens) serves an area where no growth is expected, as it is 99% built out. The service area of Pacific Gardens is 700 acres and is substantially surrounded by the City of Stockton. The district is predominantly residential, both single-family and multi-family units, with commercial properties along Country Club Boulevard. Many of the single-family homes were built around the late 1940's and early 1950's. The typical lot size east of Interstate 5 is 7,000 to 8,000 square feet. Larger residential lots are found to the west of Interstate 5 and the Stockton Golf and Country Club area. Estimated population served by the district is 6,995 residents.

The San Joaquin County Public Works Department has identified forty parcels that currently receive service from Pacific Gardens but are not within the district's service boundaries. The Public Works Department has initiated the process for annexation of these parcels to correct the district's boundaries and levy assessments for the service.

A zero sphere boundary for Pacific Gardens was adopted in 1973 because of its location within an unincorporated island within Stockton's city boundaries and sphere of influence.

### **D. Country Club Sanitary District**

Country Club Sanitary District (Country Club) serves an area where no growth is expected. There are approximately 1,037 parcels within the district boundaries, 932 of which are single-family residential units and the remaining parcels are commercial properties, schools, churches, and several multi-family residential units. Many of the single-family homes were built as early as 1936 with the typical home being built in the early 1950's. The typical lot size is about 5,450 square feet with larger lots found along the Smith's Canal. The estimated population served by the District is 2,400 residents. There are 12 vacant parcels within Country Club, which have no pending development projects. There are an additional 6 single-family residential properties in proximity to Country Club that are on septic. The parcels are contiguous to the City of Stockton, which would be the preferable entity to provide services when needed, however it would be dependent on which collection line is in proximity to the connecting parcels.

The Commission adopted a zero sphere boundary for Country Club because of its location in an unincorporated island within the City of Stockton's sphere. The District cannot expand its service or sphere boundaries because the District is bounded by the Stockton City limits on the south and east and Pacific Gardens Sanitary Sewer District to the north and west.

## **Written Determination for Growth and Population Projections**

The four special districts provide sanitary sewer services for unincorporated areas in San Joaquin County. Pacific Gardens and Country Club are located in an unincorporated island surrounded by the City of Stockton and the districts are predominately built-out except for a few scattered vacant parcels. Woodbridge Sanitary Sewer serves development south of the Mokelumne River where little or no population growth is expected. The District does not plan on serving additional areas outside its district boundaries. County Service Area No. 31 provides service to properties designated for highway and freeway services. Additional commercial development is planned on existing vacant parcels within the district.

### **2: PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS OR DEFICIENCIES**

*Refers to the status of existing and planned public facilities and its relationship to the quality and levels of service that are, can and need to be provided. Infrastructure needs and deficiencies can be evaluated in terms of supply, capacity, condition of facilities, and service quality with correlations to operational, capital improvement, and finance plans. The identification of the anticipated service level needs to be tailored to the 5-10, and 30-year sphere horizons.*

#### **A. Woodbridge Sanitary District**

WSD is the service provider for wastewater and treatment for most of the Woodbridge community. The sewage treatment plant, a percolation/evaporation pond system, has a storage capacity of 500,000 gallons per day (gpd) and is located approximately  $\frac{3}{4}$  of a mile east of Woodbridge along the banks of the Mokelumne River. The facility was completed in 1949 and was upgraded in 1972 to accommodate anticipated growth. There are currently 1,251 connections to the sewer system utilizing a capacity of 270,000 gallons per day. Recent engineering studies provided by the District indicate excess storage and disposal capacity is available at this time. There are no plans for expansion to the facility. The district does not report any deficiencies at the time.

The District recently hired an engineering firm to assess the effects of being within in a 100-year flood plain has on the District's sewer operations.

#### **B. County Service Area No. 31**

The County maintains and operates a self-contained sewer treatment plant built in 1995 that has been sized to serve the existing highway service properties within the county service area. The treatment plant effluent is usually discharged to the Highline Canal, located west of Interstate 5 or to a holding pond system to allow evaporation and percolation of the wastewater.

Since formation of CSA 31 and the completion of its sewer treatment plant, California Regional Water Quality Control Board regulations and permit requirements for sewer discharge have become increasingly stricter requiring the County to conduct more water studies and complete

upgrades to the system to be in compliance. Recent permit requirements resulted in a \$300,000 expenditure for short-term improvements. To comply with long-term requirements, the County determined that it needed to either complete a major overhaul to its sewer plant to continue discharging to the canal or pursue other alternatives to meet new permit regulations.

The County explored several options including upgrading the treatment plant, modifying the plant and effluent system to provide land-based disposal of the effluent, or request treatment services from a neighboring City. The County determined that connection to Lodi's White Slough Pollution Control Facility was the preferred alternative and negotiated a Memorandum of Understanding with the City in 2007. Subsequently bond financing and a short-term loan were obtained to build the collection lines to the facility. The City of Lodi agreed to provide treatment services with the collection system the responsibility of the CSA. The agreement provides 0.19 MGD (million gallons daily) of wastewater capacity. The CSA currently uses approximately .11 MGDs. Additional capacity, up to 0.21 MGD, can be negotiated with a new tax sharing agreement with the City.

### **C. Pacific Gardens Sanitary Sewer District**

Pacific Gardens Sanitary Sewer District (Pacific Gardens) provides maintenance and operation of the sanitary sewer infrastructure including pumping stations, force mains, and trunk lines that deliver sanitary sewer water to the City of Stockton's Regional Wastewater System. The City is responsible for the treatment and disposal of sewer discharge. Pacific Gardens wastewater collection system was sized only to serve properties within the district and can accommodate current demands and eventual development of vacant properties within the district. Pacific Gardens does not prepare service demand projections as no substantial growth within the district or within the vicinity of the district requiring services will occur because it is bounded by the City of Stockton and the Country Club Sanitary District.

The District is primarily built-out except for a few vacant parcels and occasional lot splits that may occur. In order to connect into the system, the District requires the applicant to obtain a "will-serve" letter from the City before connection indicating that the City can accommodate sewer discharge from the development.

Pacific Gardens and the City entered into an Agreement for services on August 3, 1976, which sets forth the responsibilities of each entity, the capacity limit for the district, and the basis for calculating costs to the district for service. At that time the Pacific Gardens collection system consisted of 1,890 feet of 18" sewer lines. Today, Pacific Gardens serves an estimated population of 6,995 and has approximately 2,489 connections (based on single-family equivalents). The Agreement allows additional connections and Pacific Gardens may exceed the wastewater discharge limits at an increased rate of payment. The City makes the determination if it can serve additional users by issuing a "will-serve" letter to the applicant for service.

The County Public Works Department conducted a complete inventory of the district's infrastructure. No deficiencies were reported in the system. A consultant has been hired to assess long-term system needs and funding requirements and it is expected the study will be completed in the fiscal year 2008-2009. The Public Works Department plans on using the results of the study to serve as the basis for establishing future user fees.

#### **D. Country Club Sanitary District**

The Country Club Sanitary District (Country Club) maintains 33,000 linear feet of pipe ranging from 6" to 12" in diameter. The collection system was built in 1952, using vitrified clay pipe. Approximately 60% of the collection lines are located in rear yard easements with most of the larger size lines within the public right of way.

In 1996, the Country Club Board of Directors approached the City of Stockton to discuss the feasibility of the City to take over the District's collection system. The City conducted a preliminary evaluation of the sewer collection system and determined that approximately \$1.1 million dollars would be needed to correct the systems deficiencies. In 1997 the District Board approached San Joaquin County with a similar request. The County Public Works Department further evaluated the sewer collection system and found comparable deficiencies as the Stockton study and determined that \$1.5 million dollars would be needed to replace and repair the entire system. Due to the extensive repair and replacement work and insufficient revenue sources, no further talks ensued with the City or County on taking over the sewer collection system.

In 2003, the Country Club Sanitary District Board implemented a plan to address the maintenance of the District's sewer infrastructure. The plan included a financing plan to obtain the needed revenues through a special tax to cover the costs to provide adequate revenues for maintenance and operation and infrastructure repairs. The plan requires that sewer lines be flushed and videoed on an annual basis and identified areas of concern be repaired or replaced. The District maintains that annual flushing has reduced sewer backups and improved sewer flow. The special tax provides revenues to meet the costs for major repairs and there are some funds available to plan for future repair projects.

#### **Written Determination for Present and Planned Capacity of Public Facilities and Adequacy of Public services including Infrastructure Needs and Deficiencies**

The present sewer service demand within each District can be met with existing facilities and infrastructure. Limited growth patterns within the Woodbridge, Pacific Gardens and Country Club boundaries will not require additional capacity or upgrades for the infrastructure. Wastewater treatment is provided by the City of Stockton for Pacific Gardens and Country Club by contract while the Districts are responsible for the maintenance of the sewer infrastructure. The City has considered these unincorporated pockets within their Urban Service Boundary for which services and facilities are planned. The Woodbridge Sanitary District is currently below capacity. CSA 31 recently resolved permit and regulatory compliance issues by obtaining additional wastewater discharge capacity through an agreement with the City of Lodi. Additional capacity for the CSA is available upon negotiation of a new tax sharing agreement with the City of Lodi.

The infrastructure for the Woodbridge, Pacific Gardens and Country Club sewer districts are aging, being built in the 1950's. The County Public Works is conducting an infrastructure study to determine the systems needs and deficiencies for Pacific Gardens. Country Club and Woodbridge has recognized its aging system and has implemented a financial plan to increase its reserve base to pay for major repairs. Service levels for all districts appear to be adequate to



meet current needs, and facility and financing plan procedures are in place to address future conditions.

**3: FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICE**

*A community’s public service need should be viewed in light of the resources available to fund the services. The MSR will need to evaluate factors that affect the financing of necessary improvements and whether agencies are capitalizing on financing opportunities and collaborative strategies to deal with financial constraints.*

**A. Woodbridge Sanitary District**

In addition to their share of property taxes and interest revenue, the District receives revenue from direct assessments from benefiting properties in order to cover the cost of providing services. The most recent sewer rate analysis was completed in May 2007 which provided a forecast of District revenue needs for the next five years including recommended increases in service charges, a financial plan for capital projects, and an appropriate level of replacement reserves.

Residential service charges are based on the number of bedrooms, a two-bedroom home being the equivalent of one unit. Existing sewer rates and the projected increases are shown below in Table 1:

Table 1: Woodbridge Sanitary District  
Current and Projected Annual Residential Service Charges

Residential (Equivalent Unit)*	Current	FY08-09	FY09-10	FY10-11	FY11-12
2 Bedroom (1)	\$145.54	\$152.82	\$157.40	\$162.12	\$166.99
3 Bedroom (1.25)	\$234.15	\$245.86	\$253.24	\$260.83	\$268.66

\*Additional Bedrooms increase in increments of .25 percent

Commercial customers are assessed based on effluent “strength” factors. Strength factors include the biological oxygen demand (BOD) and total suspended solids (TSS). The Woodbridge Sanitary District completed a study on all commercial properties within the District to determine treatment strength and assesses the properties accordingly.

A review of the District’s Five Year Financial Analysis indicates that the District can reasonably expect to obtain reserve levels in both the Operating and Maintenance and Capital Reserve funds.

**B. County Service Area No. 31 – Saddle City**

CSA 31 faces a major challenge to obtain adequate funding to construct, maintain and operate the infrastructure because of its small user base. Revenues for CSA 31 are generated from user fees, interest, and bond financing. A bond was issued in 2007 for the purpose of constructing a

pipeline to convey wastewater for treatment from CSA 31 to the City of Lodi's White Slough Water Pollution Control Facility and to bring the system into compliance with Regional Water Quality Control Board requirements. Total costs to upgrade the treatment plant and outfall line, permits, and other administrative costs totaled \$10 million.

Service charges are levied on benefiting parcels based on a special study to determine assignment of single-family equivalent (SFE) unit value for the type of land use and the cost for sewer treatment and maintenance. Table 1 below provides a history of sewer charges for CSA 31. Currently there are 85 SFE connections for sewer services. Sewer assessments have increased by 8% from fiscal year 2007-08 and a 9% increase is being proposed for fiscal year 2009-2010. The increase includes bond and loan repayment.

**Table 2: CSA 31 Annual Sewer Assessment Charges**

<b>CSA 31</b>	<b>FY 2006-07</b>	<b>FY 2007-08</b>	<b>FY 2008-09</b>	<b>FY 2009-10</b>
Sewer assessment per single family equivalent	\$7,260	\$7,841	\$8,547	\$9,316

**C. Pacific Gardens Sanitary Sewer District**

Revenue sources for the District include property tax, interest and benefit assessments for services. Assessments are apportioned to the benefit received and are collected by placement upon the tax rolls for each parcel. The method of apportionment used is expressed by single-family equivalents (SFE), i.e., the benefit a single-family dwelling unit on one parcel would receive. Table 2 shows SFE's by property use:

**Table 3: Pacific Gardens Sanitary Sewer District Single Family Equivalents**

<b>Residential</b>		<b>Commercial</b>	
Single Family Dwelling	1 SFE	Small Commercial (use does not exceed residential dwelling usage)	1 SFE
Multi Family Dwelling	1 SFE for first unit/ plus 7/10 SFE for each additional unit	Commercial with Consumption	1.3 SFE
Vacant or building on lot not connected	3/10 SFE	Large Commercial and Industrial	Special Study
Vacant (no service available)	0 SFE	Vacant or building on lot not Connected	3/10 SFE
		Vacant (no service available)	0 SFE

A history of assessments charges over the last four years and the proposed amount for fiscal year 2008-2009 are as follows:



**Table 4: Pacific Gardens Sanitary Sewer District Annual Assessment Charges**

Fiscal Year	Annual Assessment
2004-2005	\$334
2005-2006	\$367
2006-2007	\$404
2007-2008	\$412
2008-2009	\$412

Increases in assessments are subject to Proposition 218 requirements. In the past, capital outlay reserve funds have been funded at a level necessary to address short to midterm facility failures. Pacific Gardens currently has \$473,799 in reserve funds for replacement costs. Due to the age of the infrastructure in the District, it will be necessary to increase the assessment to fund long-term capital replacement needs. A detailed infrastructure inventory is in the process of being developed and a consultant has been hired to assess long-term system needs and funding requirements. The study results received in 2008-2009 will serve as the basis for future user fee recommendations for the district.

**D. Country Club Sanitary District**

Prior to the passage of a Special Tax Assessment in 2003, the only revenue source available to Country Club was property taxes. The amount of taxes collected for each parcel within the District was approximately \$37 per year. In addition to the annual tax rate, the City of Stockton, charges each parcel for sewer treatment approximately \$21.10 per month per single-family dwelling unit. The property tax collected from each parcel was insufficient to make substantial repairs and on-going maintenance was often deferred.

In 2003 the Country Club Sanitary District held a Special Tax election called Measure I. The District obtained a much needed approval from two-thirds of the registered voters within the District to levy a special tax assessment for the purpose of maintaining the sewer system. The special taxes levied are as follows:

**Table 5: Country Club Sanitary District Special Tax**

Type	Amount
Single Family Residential	\$72.00 per year
Multi-Residential	\$72.00 per unit per year
Apartments	\$60.00 per unit per year
Commercial units	\$150.00 per unit per year
Vacant commercial and residential	\$20.00 per parcel per year
Agricultural parcels	\$20.00 per parcel per year

Based on the review of the current District's budget, operational costs, and reserves, it appears there are adequate funds to meet present and future service needs. The special tax assessment passed by the voters within the District provides the additional funding that the District lacked previously to properly maintain the sewer system and to maintain a reserve at acceptable levels.

## **Written Determination for Financial Ability of Agencies to Provide Service**

Each of the sanitary sewer districts faces unique limitations in their ability to collect revenues to provide service. Three districts, Woodbridge, CSA 31 and Pacific Gardens, receive revenues from user fees or service charges assessed on benefiting properties, which are collectable with annual property tax statements. Service charges are based on a single-family dwelling equivalent. The commercial properties within CSA 31 are converted to single-family dwelling equivalents based on special study by the County Public Works Department. The assessments are subject to the provisions of Proposition 218 and require an Engineer's Report to demonstrate the fee level and a majority voter approval. The Country Club Sanitary District levies a special tax assessment, which had received two-thirds majority approval in 2002 in an election ballot. With the exception of CSA 31, the districts also receive property tax revenues and interest.

Revenues for CSA 31 are generated from user fees, interest, and bond financing. The district faces a major challenge to generate sufficient revenues to maintain and operate its sewer system due to the small user base of 14 users. The CSA recently faced a challenge of obtaining adequate funding to resolve Regional Water Quality Control Board violations. It was estimated that \$10 million was needed to upgrade the district's sewer treatment plant to comply with regulatory requirements. The District obtained long-term bond financing and a low interest loan from the County General Fund for the financing of the extension of a pipeline to the City of Lodi's wastewater treatment plant. This financing mechanism provided a viable solution to bring the District into compliance.

### **4: STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES**

*The service review should identify opportunities for jurisdictions to share facilities and resources creating a more efficient service delivery system. Sharing facilities and utilizing excess capacity in another agency's service system works to avoid service duplications, reduces costs, and minimizes unnecessary resource consumption. The service review will need to inventory facilities within the study area to determine if facilities are currently being utilized to capacity and whether efficiencies can be achieved by accommodating the facility needs of adjacent agencies. Options for planning for future shared facilities and services will also be considered.*

#### **A. Woodbridge Sanitary District**

The Woodbridge Sanitary District's sewer system was built for a define area for which property taxes and special assessment are being paid by the users for the service and does not offer opportunities for sharing facilities with other agencies and does not offer opportunities for shared facilities with other agencies.

#### **B. County Service Area No. 31**

The City of Lodi has agreed to provide sanitary sewer treatment at their White Slough Pollution Control Facility. The agreement provides a limited amount of wastewater capacity with the option of additional capacity upon negotiation of a new tax sharing agreement. The County explored other options and found that obtaining an agreement from the City was the most viable

option considering the small user base within the District. The District's geographic location and limited capacity provides no opportunities for sharing facilities.

### **C. Pacific Gardens Sanitary Sewer District**

The Pacific Gardens Sanitary Sewer District has an agreement with the City of Stockton for the treatment and disposal of the wastewater generated by the District. The City charges the District a sewage disposal fee for the use of the City's facilities and makes the determination on whether there is sufficient capacity to serve properties annexing into the District or vacant properties being developed.

The Pacific Gardens Sanitary Sewer District sewage collection facilities were designed for its service area only and do not offer opportunities for sharing facilities with other agencies.

### **D. Country Club Sanitary District**

The Country Club Sanitary District is responsible for the collection and transmission of sanitary sewer and by agreement, the City of Stockton is responsible for the treatment and disposal of the collected sewer.

The Country Club Sanitary District's sewer system was built for a define area for which property taxes and special assessment are being paid by the users for the service and does not offer opportunities for sharing facilities with other agencies and does not offer opportunities for shared facilities with other agencies.

## **Written Determination for Status of, and Opportunities for Shared Facilities**

Given the narrow range of services provided, geographic locations, and generally limited facilities, opportunities for shared facilities are limited. The sewer collection systems for each of the sewer districts have been designed to serve the district's service area. The districts maintain the sewer collection systems while wastewater treatment is provided by either Stockton or Lodi. Sewer treatment capacities for the districts are limited by agreements in place.

## **5: ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES**

*The MSR will consider the advantages and disadvantages of various government structures that could provide public services. San Joaquin LAFCo encourages local agencies to use service reviews to determine whether initiation of proceedings for changes of organization and reorganization, including spheres of influence, would be in order.*

### **A. Woodbridge Sanitary District**

The Woodbridge community is served by other limited service providers including: Woodbridge Lighting District (street lighting), Country Club Vista Lighting District, County Service Area 18

(drainage, lighting, and water), County Service Area 48 (Parks and recreation, streetscape and landscaping); Mokelumne Acres Maintenance District (water and drainage), Mokelumne Fire District and the Mokelumne Irrigation District. These districts are a mixture of dependent special districts governed by the Board of Supervisors and independent districts governed by a board of directors elected by voters within the district. Based on the current provision of sewer service, it is reasonable to conclude that sewer service can continue to be provided by the District under the existing government structure at this time. The District recently increased its staff to better serve its customers. It currently employs seven part-time employees including a General Manager, Secretary, and Maintenance/Laborers. The increase in staff has increased the district's effectiveness in the delivery of service.

### **B. County Service Area No. 31**

Alternatives to the government structure for CSA's are limited given their relatively small size and the limited class of services they provide. In general, CSAs can be reorganized as independent agencies, consolidated with other CSAs, merged with cities or dissolved.

If a CSA chose to reorganize as an independent agency, it would be required to provide its own management, i.e., board of directors and staff. Although the CSA can be consolidated with other CSAs, a new "zone" for CSA 31 customers would need to be created to keep their service charges and assessments separate from other CSA customers not using the same facilities and services. Consolidation will not necessarily improve efficiencies for the CSA or create an economy of scale. CSA 31 is not contiguous to any city and cannot be annex or merge with a city.

### **C. Pacific Gardens Sanitary Sewer District and Country Club Sanitary District**

A primary objective of LAFCo is to review ways to reorganize, simplify, and streamline government structure, so that public services are efficiently and economically provided to the area residents. The existence of scattered unincorporated pockets in the midst of cities is inherently inefficient for both the City and the County. Some of the inefficiencies arise in conjunction with the delivery of basic urban services, where there are often two different departments-one City, one County-providing the same kinds of services to different portions of the same neighborhood, and crisscrossing each other's territory on their way to provide the services.

The Commission recently approved Sphere of Influence Policies that address Districts within City spheres. The policy states: "LAFCo shall encourage districts and cities to develop plans for the orderly detachment, merger/dissolution of a district when districts have significant territory within a proposed city's sphere of influence". The Commission received the City of Stockton's commitment to annex unincorporated islands with the approval of the service review and sphere plan. The feasibility of annexation of this island and the dissolving of the two sanitary districts should be studied further.

## **Written Determination for Accountability of Community Service Needs, Including Government Structure and Operational Effectiveness**

Alternatives to the government structure for special districts are limited given their relatively small size and the limited class of services they provide. In general, dependent districts can be reorganized as independent agencies, consolidated with other districts, merged with cities or dissolved. If a dependent district chose to reorganize as an independent agency, it would be required to provide its own management.

The community of Woodbridge is serviced by several special districts providing limited services. Consolidation of all single purpose special districts to one multipurpose district has been considered in the past but a full study has not been pursued. Based on the current provision of sewer service by the existing structure, it is reasonable to conclude that sewer service can continue to be provided by the District at this time.

Pacific Gardens and Country Club Sanitary Districts are located in unincorporated islands within the City of Stockton sphere. The Commission recently approved Sphere of Influence Policies that address Districts within City spheres. The policy states: "LAFCo shall encourage districts and cities to develop plans for the orderly detachment, merger/dissolution of a district when districts have significant territory within a proposed city's sphere of influence". In July 2008 upon approval of the City of Stockton's sphere plan, the Commission received the City of Stockton's commitment to annex unincorporated islands. The feasibility of annexation of this large island and the dissolving of the two sanitary districts should be studied further.

### **SECTION 4: SPHERES OF INFLUENCE**

In order to adopt a sphere of influence the Commission is required to consider and make written determinations with respect to the following factors:

1. Present and planned land uses in the area
2. Present and probable need for public facilities and services in the area
3. Present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide
4. Existence of any social or economic communities of interest

In addition to a traditional sphere, the Commission adopted three other types of spheres that can be assigned to a special district:

- "*Zero sphere*" if a district that provides services which ultimately will be provided by another agency
- "*Partial sphere*" if additional information is necessary to determine a sphere boundary but is currently unavailable. A special study may be designated.
- "*Coterminous sphere*" if there is no anticipated need for the agency's services outside its existing boundaries or if there is insufficient information to support inclusion of areas outside the agency's boundaries in the sphere of influence



Based on the service review determinations and consideration of the four factors required to determine a sphere, the following types of spheres are recommended for the four sewer service districts subject to this review:

<b>Special District</b>	<b>Sphere of Influence</b>
Woodbridge Sanitary District	Coterminous
Country Service Area No. 31	Coterminous
Pacific Gardens Sanitary Sewer District	Zero
Country Club Sanitary District	Zero

## **WRITTEN DETERMINATIONS**

### **2. PRESENT AND PLANNED LAND USES IN THE AREA, INCLUDING AGRICULTURAL AND OPEN-SPACE LANDS**

#### **A. Woodbridge Sanitary District**

Land uses in the Woodbridge community include 292 acres for housing, 43 acres of public land, 7 acres of commercial uses, and 189 acres of permanent open space (a golf course and cemetery). Residential units are varied with single-family homes on smaller lots built within the original townsite of Woodbridge and larger estate homes found north of the Mokelumne River and along the fairways of the Woodbridge Golf and Country Club. The community also consists of three mobile home parks located along Lower Sacramento Road. The District does not have authority to make land use decisions, nor does it have authority over present or planned land uses within its boundaries. The responsibility for land use decisions is retained by San Joaquin County. The District does not plan to serve any other area outside its current service boundary.

#### **B. County Service Area No. 31**

CSA 31 encompasses 108.2 acres including streets and Highway 12. Land uses for CSA 31 are restricted to Highway Services. In 1983, the LAFCo Commission adopted a coterminous sphere for the CSA. The County Public Works Department indicated in its response to the questionnaire that there were no other areas that the CSA desires or plans to serve that are not now within its service boundary or its sphere of influence.

The Agreement between the City of Lodi and County specifically included clauses to ensure that land uses affecting the CSA promote the goals of Lodi and County general plans, including compact land use and development, and that discourages “leap frog development” and “urban sprawl”. The District agreed to not expand the service area boundary in a manner that would result in the need for additional City sewer capacity without first obtaining written consent of the City.

**C. Pacific Gardens Sanitary Sewer District**

The Pacific Gardens Sanitary District encompasses approximately 700 acres and consists of predominately residential, both single and multi-family units and some commercial. The District is about 99% built-out and the District cannot expand its service or sphere boundaries outward because it is bounded by the Stockton city limits, the Country Club Sanitary District, and the Stockton Channel on the west.

**D. Country Club Sanitary District**

The Country Club Sanitary District encompasses approximately 225 acres most of which are single-family homes, multi-family complexes and commercial properties and is predominately built-out. The existing sphere of influence boundary is the same as the District's service boundary. The District cannot expand its service or sphere boundaries because the District is bounded by the Stockton city limits on the south and east and the Pacific Gardens Sanitary Sewer District to the north and west.

**2. PRESENT AND PROBABLE NEED FOR PUBLIC FACILITIES AND SERVICES IN THE AREA**

**A. Woodbridge Sanitary District**

At the present time, the District has both the ability and the capacity to serve its service area. The District's present and probable need for facilities and services in the area is not expected to change. Although the District is also within the City of Lodi's sphere of influence, the City does not plan on annexing territory in the Woodbridge community; therefore there is no other provider of sewer service in the community.

**B. County Service Area No. 31**

With the agreement between the County and City of Lodi for sewer treatment and disposal, the District is meeting the sewer needs of its customers within the existing service area boundary. The future need for public facilities and services for the District area are limited due to the sewer treatment and disposal capacity limitations provided for under the City and County agreement.

**C. Pacific Gardens Sanitary Sewer District**

The District is presently meeting the sanitary sewer needs for its customers within its existing service boundary. The sewer collection system was designed to serve customers within the District boundary. The District is currently 99% built out and the District cannot expand its boundaries as it is surrounded by other jurisdictions.

**D. Country Club Sanitary District**

The District was formed in 1951 to provide sewer collection and conveyance to the unincorporated area known as the Country Club area. The district maintains 33,000 linear feet of



sewer collection and transmission facilities that were constructed to serve the district service area only. There are currently 12 vacant parcels within the district and the district can provide service when needed. The District cannot expand its boundaries.

**5. PRESENT CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES PROVIDED INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES**

**A. Woodbridge Sanitary District**

At the present time the District has excess sewer capacity, however, it does not anticipate serving areas outside its district boundary.

**B. County Service Area No. 31**

CSA 31 receives sewer treatment and disposal of wastewater services from the City of Lodi. Under the agreement the CSA is limited to 0.19 (MGD) million gallons daily of the City's wastewater plant's 8.5 MGDs capacity with the potential to expand up to and not to exceed 0.21 MGD unless a new tax sharing agreement is negotiated. The current usage for the CSA is 0.11 MGDs with .08 MGD capacity remaining.

**C. Pacific Gardens Sanitary Sewer District**

The sewer collection infrastructure for the District is adequate to meet the needs for its customers within its existing service area boundary. Sewer treatment service is provided by the City of Stockton by a 1976 agreement that provides the terms, conditions and compensation for the service. Prior to connection for service, the City makes the determination if adequate sewer treatment capacity exists. There are approximately 2,489 single-family equivalent connections to the system.

**D. Country Club Sanitary District**

The District relies on the City of Stockton to provide treatment and disposal of wastewater generated within the District's service area. Sufficient capacity is available to the District to support current needs and build-out of the District, which includes 12 vacant parcels. In prior years, the District relied on property tax revenues, which were inadequate to maintain the sewer collection system. In December 2002, the District was successful in levying a special tax that provided additional revenues for maintenance of the sewer system. The additional revenue allows the District to keep up with the costs of repairs and build up reserves, increasing the quality of service for its customers.

**6. EXISTENCE OF ANY SOCIAL OR ECONOMIC COMMUNITIES OF INTEREST IN THE AREA**

**A. Woodbridge Sanitary District**

The Woodbridge Sanitary District is within the sphere of influence of the City of Lodi. The City has expressed no desire to provide services to the Woodbridge community as stated in Lodi's

current Municipal Service Review and the residents of the community has expressed a desire to remain independent of the City.

**B. County Service Area No. 31**

The City of Lodi maintains an interest within CSA 31 as it relates to future development. In negotiating the agreement for sanitary sewer treatment services, both the City and County agreed to terms as it relates to future development of the service area.

**C. Pacific Gardens Sanitary Sewer District**

The Pacific Gardens Sanitary Sewer District is an unincorporated island surrounded by the City of Stockton. The island is included within the City's sphere of influence and urban service boundary. The City has stated in its municipal service review and sphere update approved in August 2008 that it is committed to annexing its unincorporated islands.

**D. Country Club Sanitary District**

The Country Club Sanitary District is an unincorporated island surrounded by the City of Stockton. The island is included within the City's sphere of influence and urban service boundary. The City has stated in its municipal service review and sphere update approved in August 2008 that it is committed to annexing its unincorporated islands.