

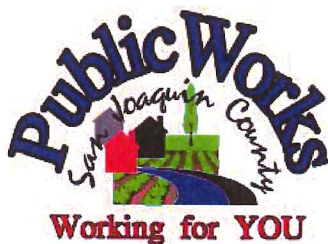


**BOWLING GREEN ESTATES MAINTENANCE DISTRICT
(SUPERVISORIAL DISTRICT 3)**

January 10, 2018

(Administered by the Department of Public Works)

**ENGINEER'S REPORT
ON
SERVICE CHARGE ADJUSTMENTS
FOR
FISCAL YEARS 2018-2019 through 2022-2023**



Prepared by
The Department of Public Works

Pursuant to SJC Ordinance Code Section 5-3302 and 5-6812
and Articles XIIC and XIID of the California Constitution

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BOWLING GREEN ESTATES MAINTENANCE DISTRICT

1. INTRODUCTION:

The preparation of this report on Special District Service Charges is required by San Joaquin County Ordinance Code Section 5-3302. This section requires that an annual report be prepared for each service area or special district for which special Service Charges will be imposed and collected on the tax roll. This report is also prepared in compliance with State law, including but not limited to Articles XIIC and XIID of the California Constitution (Proposition 218) regarding the imposition of new or increased Service Charges. It will be presented to the San Joaquin County Board of Supervisors for adoption and serves as the basis for the proposed Service Charges. This report is on file with and is available for review at the Office of the Clerk of the Board of Supervisors at 44 N. San Joaquin St. Suite 627 and may also be viewed at the Department of Public Works at 1810 E. Hazelton Ave., Stockton, CA or on-line at www.sjgov.org/pubworks.

The purpose of this report is to provide detailed information regarding the proposed Service Charge adjustments for BOWLING GREEN ESTATES MAINTENANCE DISTRICT (District). In compliance with Proposition 218, affected property owners within the District will receive a notice of the Public Hearing regarding the proposed increase in Service Charges for storm drainage. If a majority protest does not exist at the conclusion of the Hearing, the Board will be asked to approve the proposed rates, which will become effective in Fiscal Year 2018-19.

2. BOWLING GREEN ESTATES MAINTENANCE DISTRICT

The District is considered a special district pursuant to the definitions of the California Constitution Article 13D, Section 2(d). A special district is an area determined by an agency to contain all parcels that will receive a special benefit from a proposed public improvement or property-related service.

The County of San Joaquin Board of Supervisors established the District on October 26, 1967. The Resolution, which is filed with the San Joaquin County Clerk of the Board, authorizes the District to establish sufficient Service Charges for operation and maintenance of the storm drain system improvements. The District's storm drain system serves a total of 38 parcels including three non-residential parcels.

The District's storm drain system consists of 1,755 linear feet of storm drain lines and a lift station that discharges into the South San Joaquin Irrigation District.

3. DESCRIPTION OF SERVICES AND EXPENDITURES

The District currently provides for the operation and maintenance of the public storm drainage system serving properties within the district.

The proposed 2018-19 through 2022-23 budget for the District is listed in Appendix B. The proposed budget is developed in general to include:

- a) Operation and maintenance costs to pay for routine services and care necessary to properly operate and maintain public improvements, including but not limited to: storm drain cleaning, storm runoff collection, and drainage discharge services provided for the District. Operation and maintenance costs include reimbursement to various County departments and other agencies for services provided for the District.
- b) Capital replacement costs include major repairs and the amounts set aside periodically to pay for future replacement of the major components of the system. The necessary contribution to capital reserves will be phased-in over 5 years in order to provide property owners a more gradual rate increase.

4. SERVICE CHARGES

The Service Charges are utilized to generate the revenues needed to operate and to maintain the District’s facilities. The proposed Service Charges have been developed with the following considerations:

- a) Service Charges and interest revenues collected should equal operation costs once an appropriate reserve fund has been established.
- b) An adequate reserve fund should be established to cover future replacement of the major components.
- c) Major changes in Service Charges should be anticipated in advance and adjusted over a period of years, when feasible to do so.

The following table shows the current and proposed Service Charges per Single Family Equivalent (SFE). All parcels benefiting from the District’s services receive an annual Service Charge, which is generally collected annually through the property tax bill.

Bowling Green MD	Current	Proposed				
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Annual Storm Drainage Service Charge per SFE	\$12	\$36	\$52	\$69	\$85	\$101

5. METHOD OF COST APPORTIONMENT

The annual Service Charges for the District’s residential and non-residential parcels are based upon a Single Family Equivalent (SFE) unit, which refers to the service level a typical single-family dwelling unit would receive. The Service Charges are apportioned among all lots and parcels within the District as set forth in Appendix C. All parcels within the District are charged based on the proportional cost of service as compared to a single-family dwelling. The SFE method is generally recognized by municipalities as the basis for a fair and appropriate distribution.

Currently, each parcel in this District is assigned 1 SFE. For the proposed rate adjustment, SFEs have been reassigned in order to more equitably distribute the cost of providing service based on the benefit received. An analysis was performed to assign SFEs based on the percent of runoff generated by each parcel and the proportional cost of service. This is shown in Appendix E.

In some cases, certain user types require special studies to establish the service level received. A special study was conducted for three properties in this District. Notes on these parcels are shown in the table in Appendix E.

6. ANNUAL SERVICE CHARGES FOR INDIVIDUAL PROPERTIES

Appendix C contains a list of the San Joaquin County's Assessor Parcel numbers for all the properties within the boundaries of the District. The list further contains the Service Charge amounts for each benefitting parcel within the District. The list is keyed to the records of the San Joaquin County Assessor. Use Codes descriptions are shown in Appendix D.

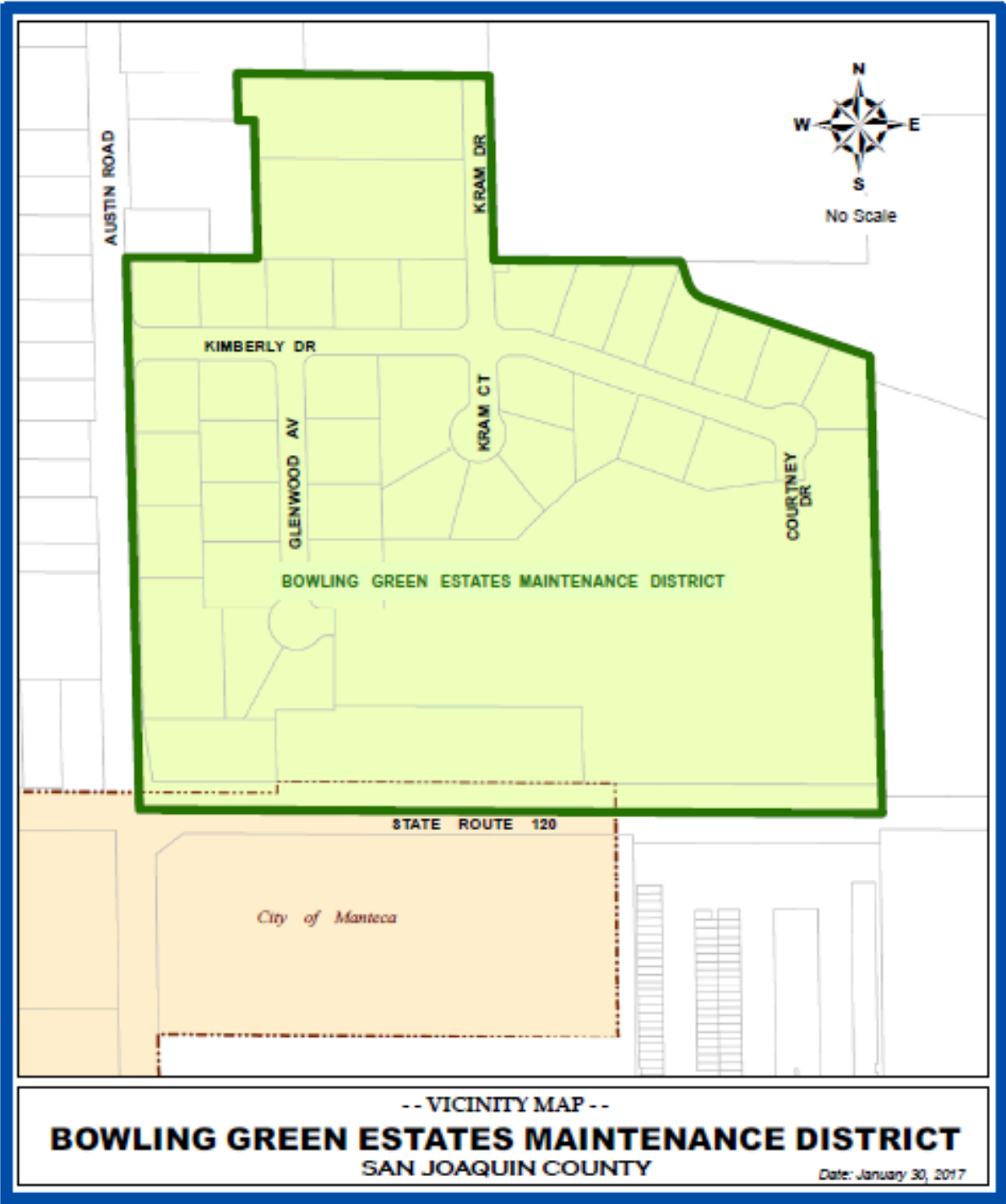
7. APPEALS AND ADJUSTMENTS

Any property owner who feels that the Service Charge levied on the subject property is in error as a result of incorrect information may contact San Joaquin County Department of Public Works. The Department of Public Works will promptly review the appeal and respond to the appellant. Adjustments to the Service Charge may be made based on the site specific information. If any changes are warranted, the correction will be made to the next regular tax roll Service Charge amount.

APPENDIX A

VICINITY MAP

APPENDIX A
BOWLING GREEN ESTATES MAINTENANCE DISTRICT MAP



APPENDIX B

PROPOSED BUDGET

APPENDIX B

Bowling Green MD	Current	Proposed				
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Storm Drainage Single Family Equivalent (SFE)	38	48.5	48.5	48.5	48.5	48.5
Annual Storm Drainage Service Charge per SFE	\$12	\$36	\$52	\$69	\$85	\$101
Revenue						
Annual Service Charges	\$456	\$1,746	\$2,522	\$3,347	\$4,123	\$4,899
Property Tax	\$795	\$803	\$820	\$836	\$853	\$857
Interest Income	\$12	\$7	\$11	\$19	\$31	\$46
Total Revenue	\$1,262	\$2,557	\$3,353	\$4,201	\$5,006	\$5,801
Operating & Maintenance Expenses						
Labor (maintenance, engineering, admin)	\$2,177	\$2,242	\$2,310	\$2,379	\$2,450	\$2,524
Electricity	\$302	\$311	\$320	\$330	\$340	\$350
Road Fund Reimbursement	(\$768)	(\$792)	(\$815)	(\$840)	(\$865)	(\$891)
Total O&M Expenses	\$1,711	\$1,762	\$1,815	\$1,869	\$1,925	\$1,983
Non-Operating Expenses						
Contribution to Capital Reserves	\$0	\$763	\$1,526	\$2,289	\$3,052	\$3,815
Total Non-Operating Expenses	\$0	\$763	\$1,526	\$2,289	\$3,052	\$3,815
Total Expenses	\$1,711	\$2,525	\$3,341	\$4,158	\$4,977	\$5,798
Annual Surplus (Shortfall)	(\$448)	\$32	\$12	\$43	\$29	\$3
Beginning Operating Fund Balance	\$1,902	\$1,454	\$1,486	\$1,498	\$1,541	\$1,570
Ending Operating Fund Balance	\$1,454	\$1,486	\$1,498	\$1,541	\$1,570	\$1,573
Capital Reserves	\$0	\$763	\$2,289	\$4,578	\$7,630	\$11,445
Total Fund Balance	\$1,454	\$2,249	\$3,787	\$6,119	\$9,200	\$13,018

APPENDIX C

ANNUAL SERVICE CHARGES FOR INDIVIDUAL PROPERTIES

Parcels		Annual Service Charge							
Assessor's Parcel Number	Use Code	Current		Proposed					
		SFE	Current FY 2017-18	SFE	Proposed FY 2018-19	Proposed FY 2019-20	Proposed FY 2020-21	Proposed FY 2021-22	Proposed FY 2022-23
208-200-17	051	1	\$12	3.5	\$126	\$182	\$242	\$298	\$354
208-200-18	022	1	\$12	2.5	\$90	\$130	\$173	\$213	\$253
208-200-24	007	1	\$12	1.5	\$54	\$78	\$104	\$128	\$152
208-200-25	722	1	\$12	5.5	\$198	\$286	\$380	\$468	\$556
208-200-26	916	0	\$0	0	\$0	\$0	\$0	\$0	\$0
208-350-19	051	1	\$12	2	\$72	\$104	\$138	\$170	\$202
208-350-01	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-02	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-03	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-04	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-05	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-06	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-07	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-08	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-09	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-10	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-11	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-12	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-13	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-14	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-18	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-16	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-350-17	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-01	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-02	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-03	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-04	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-05	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-06	925	0	\$0	0	\$0	\$0	\$0	\$0	\$0
208-360-07	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-08	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-09	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-10	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-11	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-12	010	1	\$12	1.5	\$54	\$78	\$104	\$128	\$152
208-360-13	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-14	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-15	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-16	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
208-360-17	010	1	\$12	1	\$36	\$52	\$69	\$85	\$101
TOTAL		38	\$456	48.5	\$1,746	\$2,522	\$3,347	\$4,123	\$4,899

APPENDIX D

SFEs BY USE CODE

USE CODE	DESCRIPTION	MINIMUM SFE FACTOR
		STORM DRAINAGE
	RESIDENTIAL	
007	POTENTIAL RESIDENTIAL SUBDIVISION	1
010	SINGLE FAMILY DWELLING (SFD)	1
022	TWO SFDS ON SINGLE PARCEL	1
051	RURAL RESIDENCE - 1 RES.	1
	INSTITUTIONAL	
722	SPECIAL SCHOOL	1
	UTILITIES & GOVERNMENT	
916	MISC STATE PROPERTY	SPECIAL STUDY
925	MISC COUNTY PROPERTY	SPECIAL STUDY

APPENDIX E

RUNOFF CALCULATION FOR SFE ASSIGNMENT

Assessor's Parcel Number	Use Code	Acreage (Ac)	Runoff Coefficient (C) ¹	Unit Runoff (Ac x C)	Percent of Total Runoff (unit runoff / total unit runoff)	SFEs (rounded to nearest .5)	Notes
208-200-17	051	1.82	.25	0.45	7.5%	3.5	
208-200-18	022	1.36	.25	0.34	5.6%	2.5	
208-200-24	007	1.00	0.20	0.20	3.3%	1.5	Vacant land used for farming - full parcel site is 9.88 acres. Only portion adjacent to roadway (approximately the area of 3 parcels, or 1 acre) is estimated to contribute runoff to the system.
208-200-25	722	1.75	0.40	0.70	11.6%	5.5	
208-200-26	916	Storm Pond	0.00	0.00	0.0%	0.0	State owned parcel used as a storm drain basin which retains runoff.
208-350-19	051	0.87	.30	0.26	4.3%	2.0	
208-350-01	010	0.35	.35	0.12	2.1%	1.0	
208-350-02	010	0.35	.35	0.12	2.1%	1.0	
208-350-03	010	0.34	.35	0.12	2.0%	1.0	
208-350-04	010	0.34	.35	0.12	2.0%	1.0	
208-350-05	010	0.34	.35	0.12	2.0%	1.0	
208-350-06	010	0.34	.35	0.12	2.0%	1.0	
208-350-07	010	0.33	.35	0.11	1.9%	1.0	
208-350-08	010	0.34	.35	0.12	2.0%	1.0	
208-350-09	010	0.38	.35	0.13	2.2%	1.0	
208-350-10	010	0.34	.35	0.12	2.0%	1.0	
208-350-11	010	0.34	.35	0.12	2.0%	1.0	
208-350-12	010	0.34	.35	0.12	2.0%	1.0	
208-350-13	010	0.38	.35	0.13	2.2%	1.0	
208-350-14	010	0.29	.35	0.10	1.7%	1.0	
208-350-18	010	0.33	.35	0.11	1.9%	1.0	
208-350-16	010	0.34	.35	0.12	2.0%	1.0	
208-350-17	010	0.34	.35	0.12	2.0%	1.0	
208-360-01	010	0.34	.35	0.12	2.0%	1.0	
208-360-02	010	0.34	.35	0.12	2.0%	1.0	
208-360-03	010	0.34	.35	0.12	2.0%	1.0	
208-360-04	010	0.34	.35	0.12	2.0%	1.0	
208-360-05	010	0.34	.35	0.12	2.0%	1.0	
208-360-06	925	Storm Pump	0.00	0.00	0.0%	0.0	Site of the District storm drain pump station
208-360-07	010	0.31	.35	0.11	1.8%	1.0	
208-360-08	010	0.34	.35	0.12	2.0%	1.0	
208-360-09	010	0.40	.35	0.14	2.3%	1.0	
208-360-10	010	0.39	.35	0.13	2.2%	1.0	
208-360-11	010	0.40	.35	0.14	2.3%	1.0	
208-360-12	010	0.67	.30	0.20	3.4%	1.5	
208-360-13	010	0.34	.35	0.12	2.0%	1.0	
208-360-14	010	0.29	.35	0.10	1.7%	1.0	
208-360-15	010	0.34	.35	0.12	2.0%	1.0	
208-360-16	010	0.35	.35	0.12	2.0%	1.0	
208-360-17	010	0.35	.35	0.12	2.0%	1.0	
Total		18.54		6.03	100.0%	48.5	

1. Runoff coefficients based on land use types listed in Tables 3-1 and 3-2 of the San Joaquin County Improvement Standards