

Woodbridge Sanitary District

Municipal Services Review and Sphere of Influence Plan

Prepared for:
Woodbridge Sanitary District

for submittal to

San Joaquin County
Local Agency Formation Commission

Prepared by:



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DRAFT

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ENGINEER'S SEALS AND SIGNATURES

<p>I certify under penalty of law that I have personally examined and am familiar with the information submitted in this document and all attachments and that, based on my knowledge and on my inquiry of those individuals immediately responsible for obtaining the information, I believe that the information is true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment.</p>	<p>Neal T. Colwell My license renewal date is 12/31/2023</p>
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EXECUTIVE SUMMARY

This report has been prepared as a Municipal Services Review of the Woodbridge Sanitary District. It is intended to provide the San Joaquin Local Agency Formation Commission (LAFCO) with factual and analytical information in adherence to the state-required comprehensive study of services within the applicable boundaries. Determination of the Sphere of Influence for local government agencies is one of the primary responsibilities held by LAFCO. A sphere of Influence (SOI) is defined as a "plan for the probable physical boundaries and service area of a local agency as determined by the Commission" (Government Code Section 56076). A sphere is primarily a planning tool that provides guidance in reviewing individual proposals. Inclusion within an agency's sphere does not indicate that an affected area automatically will be annexed; an adopted SOI is only one of several factors the Commission must consider in reviewing individual proposals (Government Code Section 56668).

The purpose of the SOI is to ensure the provision of efficient services while discouraging urban sprawl and the premature conversion of agricultural and open space lands by preventing overlapping jurisdictions and duplication of services. An SOI serves a similar function in LAFCO determinations as General Plans do for cities and counties. Consistency with the adopted SOI is critical, and changes to the SOI require careful review.

San Joaquin LAFCO use Spheres of Influence to:

1. Promote orderly growth and urban development;
2. Promote cooperative planning efforts among cities, the county and special districts to address concerns regarding land use and development standards, premature conversion of agriculture and open space lands, efficient provision of services, and discouragement of urban sprawl.
3. Serve as a master plan for future local government reorganization by providing long range guidelines for efficient provision of public services.
4. Guide consideration of proposals and studies for changes of organization or reorganization.
5. For cities and special districts that provide public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services within any disadvantaged unincorporated communities (DUCs) within the sphere of influence.

Per Government Code Section 56425, LAFCOs are required to consider and make written determinations with respect to the following factors:

1. The present and planned land uses in the area, including agricultural and open space lands.
2. The present and probable need for public facilities and services in the area.
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.

Approximately 420 acres of primarily residential land use type is contained within the current WSD SOL boundary. Present land use types within WSD's existing SOL boundary are listed as Agriculture-Urban Reserve, General Agriculture, Community Commercial, Very Low Density Residential, Low Density Residential, Medium Density Residential, and Public Facilities. Current land use type for the proposed SOL amendment area is Agriculture-Urban Reserve and future land use type for the proposed SOL amendment area is Very Low Density Residential. Figure ES-1 shows both the existing land use types within the current SOL boundary and the proposed land use type within the considered SOL amendment.

ES 1.1 PRESENT AND PLANNED LAND USES

Existing Woodbridge Sanitary District (WSD) SOL boundary is coterminous with the WSD service area boundary. Determinations outlined below affirm the ability of WSD to provide acceptable levels of service to the existing and future populations within the existing SOL boundaries and the proposed SOL amended boundaries considered herein.

ES 1 DETERMINATION REGARDING SPHERE OF INFLUENCE BOUNDARIES

For each of the factors above, this document discusses and provides determinations. This report is intended to address two objectives: (1) propose an amendment to the Woodbridge Sanitary District's SOL reflecting addition of territory to the existing SOL Plan, and in doing so, make determinations to satisfy Government Code Section 56425; and (2) conduct a MSR to make six determinations regarding Woodbridge Sanitary District's ability to provide services to current and future residents and businesses within the current and proposed SOL amendment boundaries.

1. Growth and population projections for the affected area.
2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.
3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.
4. Financial ability of agencies to provide services.
5. Status of, and opportunities for, shared facilities.
6. Accountability for community service needs, including governmental structure and operational efficiencies.

Additionally, Municipal Service Review (MSR) must be prepared and updated to establish, update or confirm an existing SOL and the MSR must address six determinations. A MSR must have written determinations that address the following factors:

4. The existence of any social or economic communities of interest in the area if the Commission determines that they are relevant to the agency.

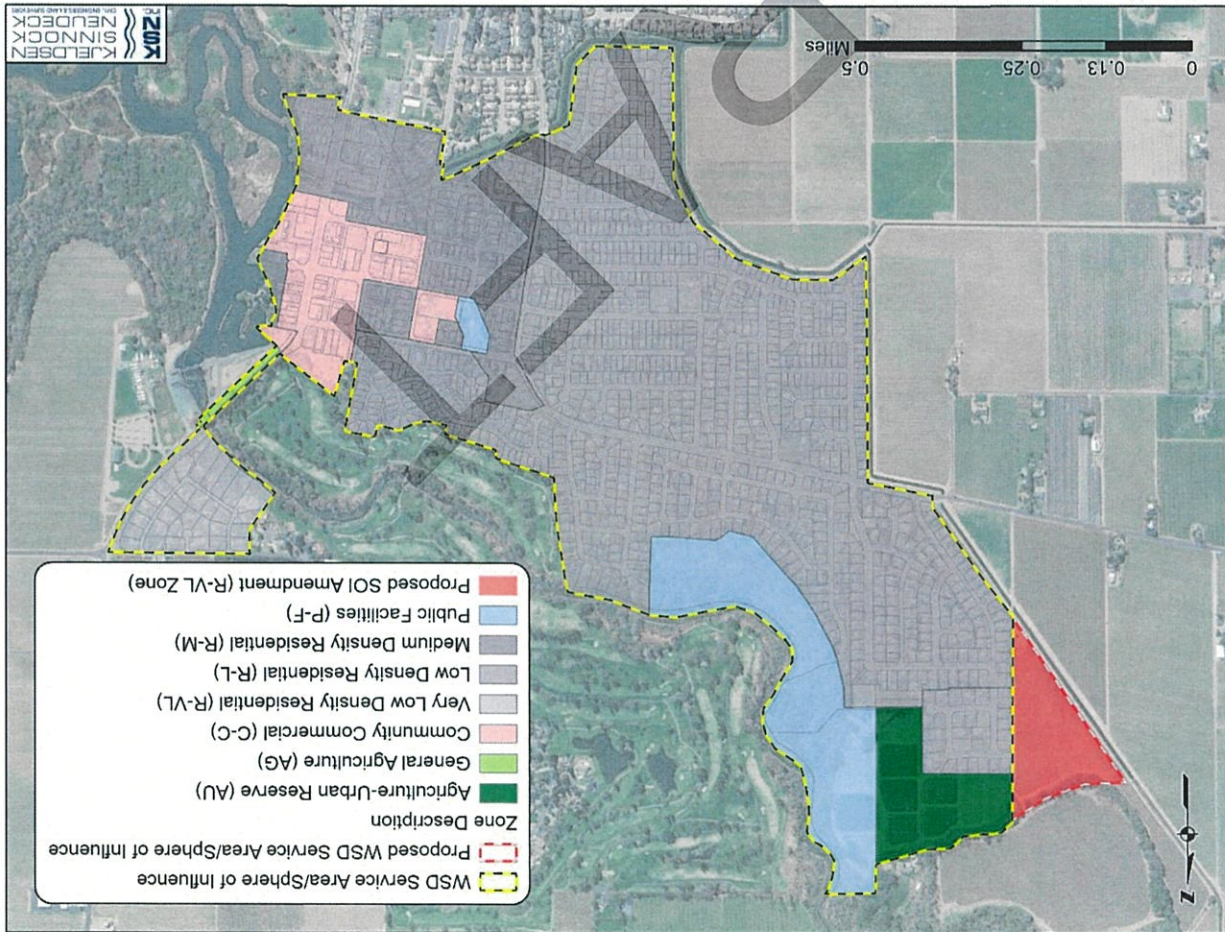
Expected capacity of wastewater treatment and disposal facilities as presented in a previous 2014 capacity assessment determined that WSD Wastewater Treatment Plant (WWTP) could accommodate at least 0.32 Mgal/d of Average Dry Weather Flows (ADWF) and loads. The 2014 capacity assessment assessed WSD's ability to accommodate a range of proposed Woodbridge Golf & Country Club expansions in addition to infill within the current existing WSD service area. It is the primary basis for calculations used in WWTP capacity calculations in this report.

ES 1.3 PRESENT CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES

WSD statutorily provides sanitary sewer service including the collection and treatment of wastewater and additionally provides solid waste services via a solid waste contract with Cal Waste Recovery systems (Cal Waste). Evaluation of WSD services with respect to the proposed SOL amendment is solely for the services that WSD provides, namely wastewater collection and treatment and solid waste services. Existing public facilities and services have been determined to be adequate for the existing SOL and proposed SOL amendment.

ES 1.2 PRESENT AND PROBABLE NEED FOR PUBLIC FACILITIES AND SERVICES

Figure ES-1
Planned Land Uses and Proposed Boundaries



¹ Determination based on the 2020 Final Rate Study.

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (CKH Act) requires LAFCO to conduct service reviews prior to establishing or amending spheres of influence. A service review is a comprehensive review of services within a designated geographic area intended to obtain information about municipal or agency services. Its purpose is to evaluate the provision of services from a comprehensive perspective and recommend actions, when necessary, to promote the efficient provision of those services. The 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 the provision of efficient and effective public services. LAFCO must have a current MSR that demonstrates that the agency can provide adequate and efficient services to the areas included within the agency's sphere. Six determinations

ES 2 DETERMINATIONS REGARDING THE DISTRICTS ABILITY TO PROVIDE SERVICES

WSD does not currently contain any social or economic communities of interest. Woodbridge is not considered disadvantaged by the State of California, and recent analysis of median household income of Woodbridge was determined to be 126.6% of the state median household income¹. This is well above the defined median household income that would qualify as a disadvantaged community per Section 79505.5 of the California Water Code and is not identified by San Joaquin County as a DUC.

ES 1.4 EXISTENCE OF SOCIAL AND ECONOMIC COMMUNITIES OF INTEREST

A recent 2021 WWTP modernization project was completed to further maintain the existing wastewater pumping, treatment, and disposal facilities. The modernization project consisted of several treatment plant improvements, including replacement of the center flow band screen with the multi-rake bar screen, cleaning and coating and rehabilitation of the existing east Imhoff tank, replacement of mechanical piping and gate replacements at the west Imhoff tank, replacement of the emergency generator, SCADA upgrades and remote lift station electrical improvements. This project was financed by a \$1.5M USDA RD Water and Environmental Loan and Grant Program low-interest loan and was essential for WSD to replace and/or rehabilitate existing WSD facilities to reliably operate, increase safety, and improve system operation in order to provide a critical service to the community of Woodbridge. Construction of the project began in mid-February 2021 and concluded by the end of 2021.

The addition of 27 residential units in the proposed SOI amendment is anticipated to be within the capacity of WSD's wastewater system and Cal Waste's capabilities. Therefore, it is not anticipated that additional facilities and services will be required to serve existing customers or the proposed SOI amendment. Externally contracted solid waste collection and disposal for existing WSD service was deemed sufficient based on the 2018 Cal Waste contract found in Appendix A.

1. Wastewater collection, treatment and disposal.
2. Solid waste collection and disposal.

Present capacity of public facilities and adequacy of public services provided by WSD were determined to be adequate for the following services.

Projected population within existing WSD boundaries was dependent upon the 2010 to 2020 average annual growth rate for the area, 0.54%, representing moderate sustained growth. Estimated total buildout population for the future was based on the sum of maximum buildout population within the existing WSD SOI and projected additional population resulting from the proposed SOI amendment to include the Rivermist Development. The 30-Year maximum buildout population in the year 2050 is projected to be 3,892 persons and limited by the existing WSD sewer connection capacity. As the population reaches the maximum buildout potential within WSD, population growth will likely decline due to a decline in available vacant lands.

ES 2.2 PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS OR DEFICIENCIES

WSD WWTP capacities, as they are detailed in Section 4 and a previous capacity assessment completed in 2014 by KSN Inc., indicate that WWTP facilities are all sufficient to meet anticipated flows from the proposed amended SOI. A previous 2014 capacity assessment determined that WSD was capable of accommodating ADWF of up to 0.32 Mgal/d. As discussed in the Section ES 1.3, the recent modernization project accomplished improvements to the wastewater service system and was financed through a \$1.5M USDA RD Water and Environmental Loan and Grant Program low-interest loan.

1. Based on the data collected from the 2020 census.

Year	Population (Persons) (1)	Year-to-year % Change
2010	3,283	--
2011	3,279	-0.12%
2012	3,298	0.58%
2013	3,335	1.12%
2014	3,369	1.02%
2015	3,389	0.59%
2016	3,421	0.94%
2017	3,464	1.26%
2018	3,501	1.07%
2019	3,499	-0.06%
2020	3,465	-0.97%
2021 (projected) ²	3,484	-
Average Annual % Growth		0.54%

Population Trends Based on U.S. Census Bureau Data

Table ES-1

Based on readily available population data, historical population estimates for 2010 through 2020 are summarized in Table ES-1 and show the estimated 2021 population. Population within the WSD service area was estimated by calculating the populations at the census block level and intersecting this data with the existing WSD service area boundary.

ES 2.1 GROWTH AND POPULATION PROJECTIONS

addressed by the MSF are outlined above are detailed below. Determinations are intended to bridge any knowledge gap between the raw data available and the final conclusion about the status or condition of the services under review.

Alternatives for variation in governance structures are limited due to the constraints of WSD's relatively small size and limited class of services provided. The community of Woodbridge is serviced by several special districts that provided limited services. Access and information for public participation regarding services is provided via monthly meetings. Services provided by WSD that include collection, treatment, disposal of wastewater and solid waste are reasonably assumed to be the most efficient structure based on already existing operations and services. Alternative structures to governance would have to be thoroughly studied before making commitments to any governance restructuring.

EFFICIENCIES

ES 2.5 ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATION

WSD's sewer system was built for a defined area for which property taxes and special assessments 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. Given the narrow range of services provided, geographic location, and generally limited facilities, opportunities for shared facilities are limited per the 2009 WSD MSR.

ES 2.4 STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

The rate study accounts for the \$1.50 million USDA loan that WSD has secured for phase one wastewater treatment plant upgrades; it also assumes that WSD secures a second USDA loan within another three years to pay for phase two of necessary improvements at the wastewater treatment plant. In the rate study, an increase in annual fees was deemed necessary for all customers over a six-year period. The impact of the rate increases is greater on higher-strength wastewater customers. By the end of year 6, with implementation of the proposed rates, it is projected that revenue sufficiency will be achieved to cover all projected costs within the six-year period and that WSD will have \$250,000 in the capital fund and 7.5 months of operating expenses available in unrestricted funds.

- To generate sufficient revenue to provide reliable wastewater service and prudent reserve
- To sustain ongoing operations and maintenance, and
- To fund debt service and necessary capital improvement projects to remain compliant with local, state and federal-mandated regulations.

The 2020 Rate Study concluded that the need to increase wastewater rates was necessary, based on the following reasoning:

This review of the WSD financial data indicates that WSD can reasonably expect to obtain sufficient revenues to provide adequate services within the WSD service area. This conclusion is primarily based on the 2020 Rate Study and the Independent Auditors' Report completed by Schwartz Giannini Lantsberger & Adamson for the year ended June 30, 2020. Beginning in the fiscal 2020-2021 WSD sewer service rates increases were proposed and adopted over the course of six years. For a 3-bedroom single family home, the current (2021-2022) annual fee is \$434.50, and at the end of the six-year period the annual fee would be \$563.18. Stated monthly, the current fee of \$36.21 per month would ultimately increase to \$46.93 per month by year six.

ES 2.3 FINANCIAL ABILITY OF THE AGENCY TO PROVIDE SERVICES

ES 2.6 DISADVANTAGED UNINCORPORATED COMMUNITIES

Per Senate Bill (SB244), an additional determination for the MSR was added to the LAFCO review process regarding Disadvantaged Unincorporated Communities (DUC). A DUC is an inhabited area, as defined by Section 56046, or as determined by commission policy, that constitutes all or a portion of a "disadvantaged community" as defined by Section 79505.5 of the California Water Code. A "disadvantaged community" is defined as a community with an annual median household income that is less than 80 percent of the statewide annual median household income. The intent of the legislation is to prohibit the exclusion of under-served, inhabited areas with infrastructure deficiencies and lack of access to reliable services while selecting cities of tax-generating land uses. DUCs are recognized as social and economic communities of interest for purposes of recommending SOI determinations pursuant to Section 56425(c). This is not an applicable element for the WSD MSR because the existing WSD SOI proposed SOI amendment territory do not meet the definition of a DUC as it is defined above².

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² Determination based on the 2020 Final Rate Study.

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000, Government Code section 56000 et seq. (CKH Act) requires San Joaquin County Local Agency Formation Commission (LAFCO) to review and update spheres of influence for all applicable jurisdictions in the County. A Sphere of Influence (SOI) is defined as "a plan for the probable physical boundary and service area of a local agency, as determined by the Commission." (§56076.) LAFCO policies require that any time an agency seeks to add new territory to its SOI, a SOI amendment is needed and all amendment proposals to be consistent with an updated Municipal Services Review (MSR). The legislative authority for conducting an MSR is provided in section 56430 of the CKH Act. The CKH Act states, "in order to prepare and to update spheres of influence in accordance with section 56425, the commission shall conduct a service review of the LAFCO to plan for the current and future needs within the probable physical boundaries and service area, and the MSR provides analysis and determinations of outlined criteria based on the existing and future services provided by the Woodbridge Sanitary District.

1.1 SPHERE OF INFLUENCE AMENDMENT PROCESS

A sphere of influence is a planning boundary outside of an agency's legal boundary (such as the city limit line) that designates the agency's probable future boundary and service area. Factors considered in a sphere of influence review focus on the current and future land use, the current and future need and capacity for service, and any relevant communities of interest. With the passage of the CKH Act, spheres for all cities and special districts should be reviewed every five years. The purpose of the sphere of influence is to discourage urban sprawl and safeguard the efficacy of public services by ensuring that jurisdictions and services are not duplicated. Woodbridge Sanitary District's existing SOI and the SOI amendment proposed herein are intended to provide determinations like a General Plan would for a city or county. Written determinations for the SOI are required while considering the amending the SOI (§56425). Specifically, these determinations are:

1. The present and planned land uses in the area, including agricultural and open space lands.
2. The present and probable need for public facilities and services in the area.
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.
4. The existence of any social or economic communities of interest in the area if the Commission determines that they are relevant to the agency.

1.2 MUNICIPAL SERVICE REVIEW FACTORS TO BE ADDRESSED

Woodbridge Sanitary District (WSD) is proposing the addition of territory in the SOL amendment, specifically 27 residential units, that would contribute additional flows to the existing WSD service plan and therefore, a reevaluation of the MSR was needed to confirm that existing facilities were capable providing adequate service and are consistent with the plan for services. Per the CKH Act, a MSR must have written determinations that address the following factors:

- 1) Growth and population projections for the affected area.
- 2) The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence.
- 3) Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.
- 4) Financial ability of agencies to provide services.
- 5) Status of, and opportunities for, shared facilities.
- 6) Accountability for community service needs, including governmental structure and operational efficiencies.
- 7) Any other matter related to effective or efficient service delivery, as required by Commission policy.

For each of the above factors applicable to the services provided by the Woodbridge Sanitary District (WSD), this document will discuss and provide determinations.

1.3 BACKGROUND

WSD encompasses the unincorporated San Joaquin County community of Woodbridge, just northwest of the City of Lodi and primarily south of, and adjacent to the Mokelumne River. The current District boundary encompasses about 420 acres. Existing development in Woodbridge is primarily residential with a small component of commercial and institutional development along Lower Sacramento Road. District Boundaries along with the Wastewater Treatment Plant (WWTP) are shown in Figure 1-1 for reference. WSD is a public agency that operates and maintains the sanitary sewer lines and treats wastewater generated by the residents and businesses of Woodbridge. Additionally, WSD, through a contract with Cal Waste Recovery Systems (Cal Waste), provides solid waste services that include the collection of garbage, yard waste and recyclable materials within the WSD boundary.

WSD was formed on May 11, 1949 as an independent special district under the County Sanitation District Act (Health and Safety Code, Section 4700). It is governed by five Board of Directors that are elected to four-year terms. WSD currently employs 13 part-time employees including a General Manager, Secretary, and Maintenance/Laborers per 2020 financial reporting data.

The WSD WWTP treats sewage through influent screening, Imhoff tank primary treatment, secondary pond aeration treatment, and a percolation/ evaporation ponds that provides for land disposal of treated effluent for wastewater.

generated by the community of Woodbridge. In 1973, a "Zero Sphere of Influence" for WSD was adopted with four other special districts located within the Woodbridge community and within the sphere of influence for the City of Lodi and a subsequent planned approach for the provision of services within the Woodbridge community area was developed. The City of Lodi's General Plan adopted April 7, 2010 does not include plans to provide service to the WSD service area or the proposed SOI amendment territory. The Woodbridge Sanitary District (WSD) SOI is recommended to be classified as "coterminous sphere" per the 2009 WSD MSR⁴, meaning 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. Classification as a coterminous sphere would continue should the proposed territory in the SOI amendment be approved.

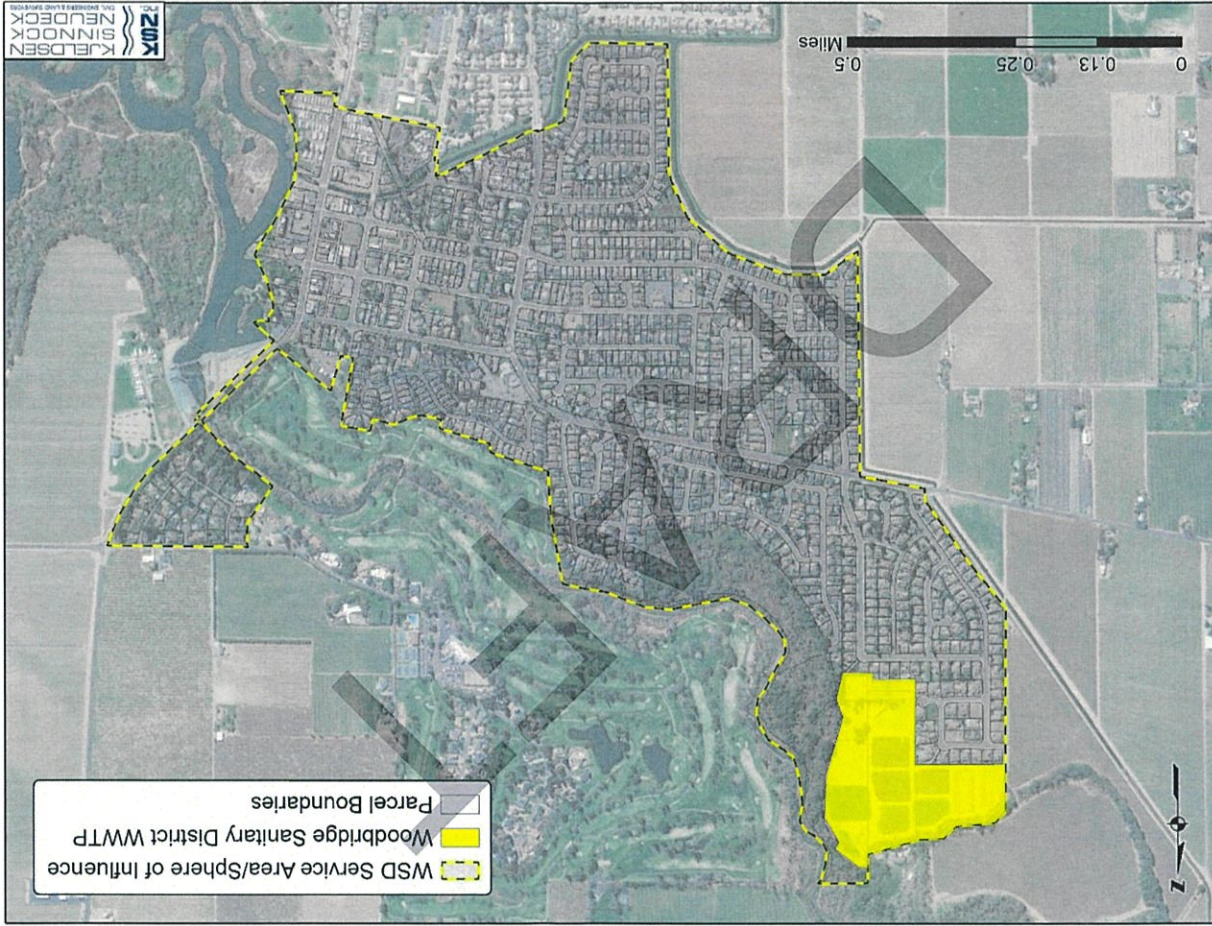


Figure 1-1
Woodbridge Sanitary District Boundary

³ As referenced in the 2009 Service Review and Sphere of Influence Updates of Sanitary Sewer Service in San Joaquin County, the four other districts include: Augusta Street Lighting Maintenance District, Country Club Vista Improvement and Street Lighting Maintenance District, Kirst Estates Maintenance District, and Mokolunne Acres Maintenance District.

⁴ Per the 2009 Municipal Services Review and Sphere of Influence Update for Woodbridge Sanitary District

In 2014, Kjeldsen, Sinnock and Neudeck Inc. (KSN) conducted a capacity assessment of the WSD wastewater treatment plant (WWTP) capacity to make a determination of facility capabilities to accommodate increased flows from a planned development of the Woodbridge Golf and Country Club (WG&CG) clubhouse expansion and associated residential development. This capacity assessment estimated that a maximum development scenario resulted in a projected Average Dry Weather Flow (ADWF) of 0.32 Mgal/day from development within WSD, WG&CG expansions, and 36 residential units. Average BOD₅ production and average suspended solids production were estimated for several scenarios. KSN evaluated the specific capabilities of the WSD facilities for which determinations of capacity are based upon, determining that at WSD could accommodate least 0.32 Mgal/d of flows and corresponding loads.

Per LAFCO policy, SOI amendments "shall precede consideration of proposals for changes of organization or reorganization" demonstrating the precedence of SOI amendments over SOI annexations. Based on a landowner request, WSD is proposing that an adjacent parcel, totaling approximately 15.2 acres in size, be considered by LAFCO via a SOI amendment and then pending amendment approval, subsequently considered via an annexation proposal. The parcel in consideration, identified as Assessor's Parcel Numbers (APN) 015-020-56 (15.2 acres) is located just north of the Woodbridge Irrigation Canal and east of North Windwood Drive. San Joaquin County LAFCO designated the parcel as Agriculture-Urban Reserve. APN-015-020-56 is zoned AU-20 (Agriculture-Urban Reserve, minimum parcel size 20 acres) and APN-015-057 is zoned AG-40 (General Agriculture, minimum parcel size 20 acres).

The proposed WSD service area would be extended to provide service to the property in consideration. Proposed development of the property is a total of 27 single family residential units. The proposed lots are to be zoned as very-low density residential (V-RL Zone) with 2 residential units per acre. This zone is intended as a transition from rural to urban areas. It allows for detached, single-family dwellings on large lots located in existing communities or on the urban fringes. Full urban services are required for development in this zone, and the developed property is estimated to contribute 76 persons to the total WSD boundary population by the year 2025. WSD wastewater treatment capacity analyzed further in Section 4, paired with a previous 2014 capacity assessment, shows that available capacity is capable of handling flows and loads from the proposed area to be added to the SOI.

It is anticipated that solid waste disposal provided by Cal Waste will be capable of extending services to the proposed SOI amendment; however, an amendment to the 2018 agreement between Cal Waste and WSD is needed to extend services to the coterminal WSD and SOI boundaries. The existing agreement between Cal Waste and WSD is included in Appendix A.

Sphere of Influence Plan

Per Government Code Section 56076, a SOI is defined as a "plan for probable physical boundaries and service area of a local agency, as determined by the commission." This SOI amendment requires the approval of LAFCO, which has sole discretion to determine the establishment and amendment boundaries. As previously stated, LAFCO uses the SOI to:

1. Promote orderly growth and urban development.
2. Promote cooperative planning efforts among cities, the county and special districts to address concerns regarding land use and development standards, premature conversion of agriculture and open space lands, efficient provision of services, and discouragement of urban sprawl.
3. Serve as a master plan for future local government reorganization by providing long range guidelines for efficient provision of public services.
4. Guide consideration of proposals and studies for changes of organization or reorganization.
5. For cities and special districts that provide public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services within any disadvantaged unincorporated communities (DUCs) within the sphere of influence.

WSD is requesting to amend its existing SOI to include the proposed Rivermist development in what would be an expansion to the Northwest of the WSD boundary. Written determinations outlined by the CKH Act are used to guide LAFCO's decision in the consideration of this SOI amendment proposal. LAFCO is required to consider and make written determinations. Determinations are made herein for the addition of new, proposed territory.

2.1 SPHERE OF INFLUENCE BOUNDARIES

The existing Woodbridge SOI and WSD cotermious boundary and service area are shown in Figure 2-1 below and the proposed SOI amendment boundary is shown in Figure 2. Because the SOI boundary is defined as cotermious with WSD's service area boundary, the proposed addition to the District's SOI is a contiguous extension of the SOI boundary with WSD planning to extend services to the SOI area once the LAFCO annexation process is complete.

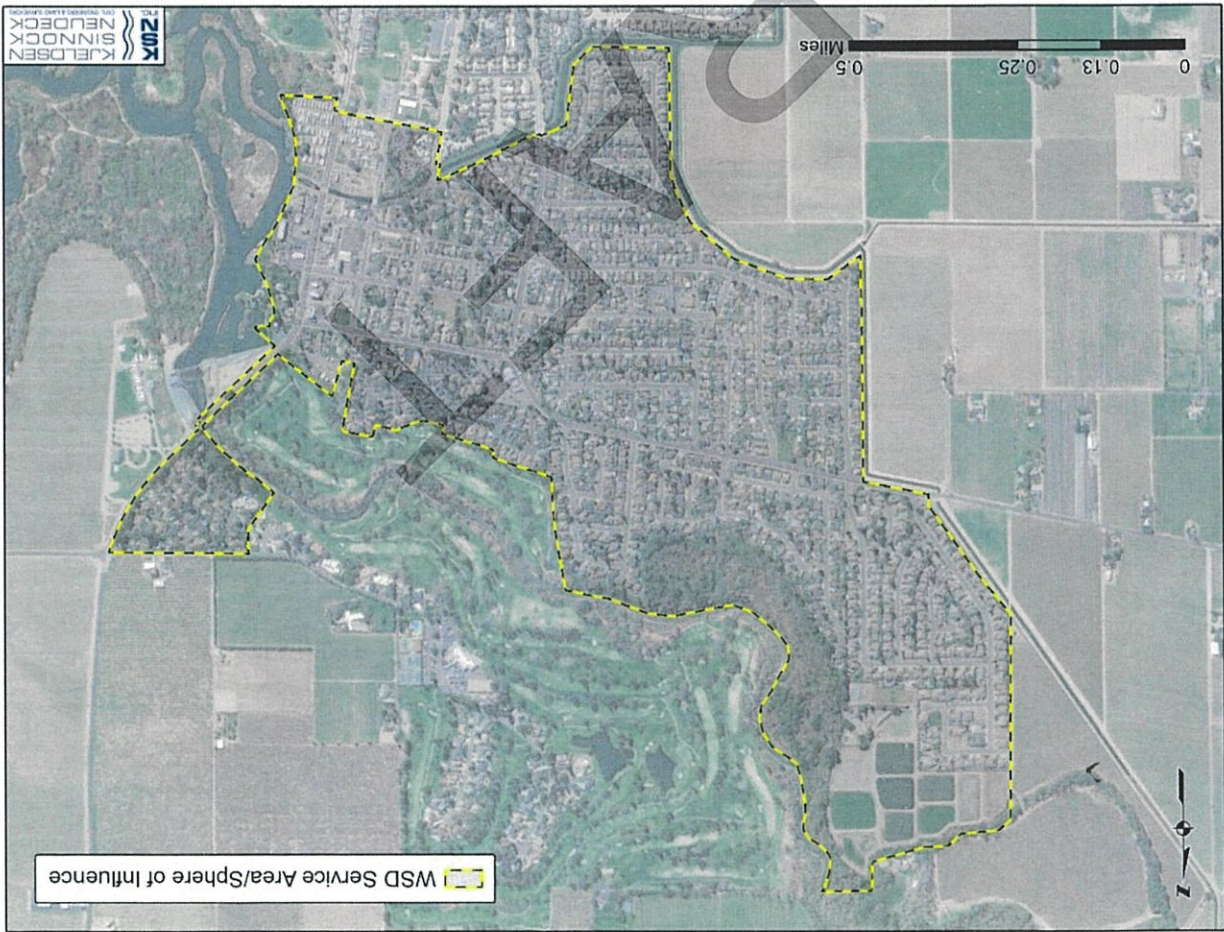


Figure 2-1
Existing WSD Sphere of Influence Boundaries

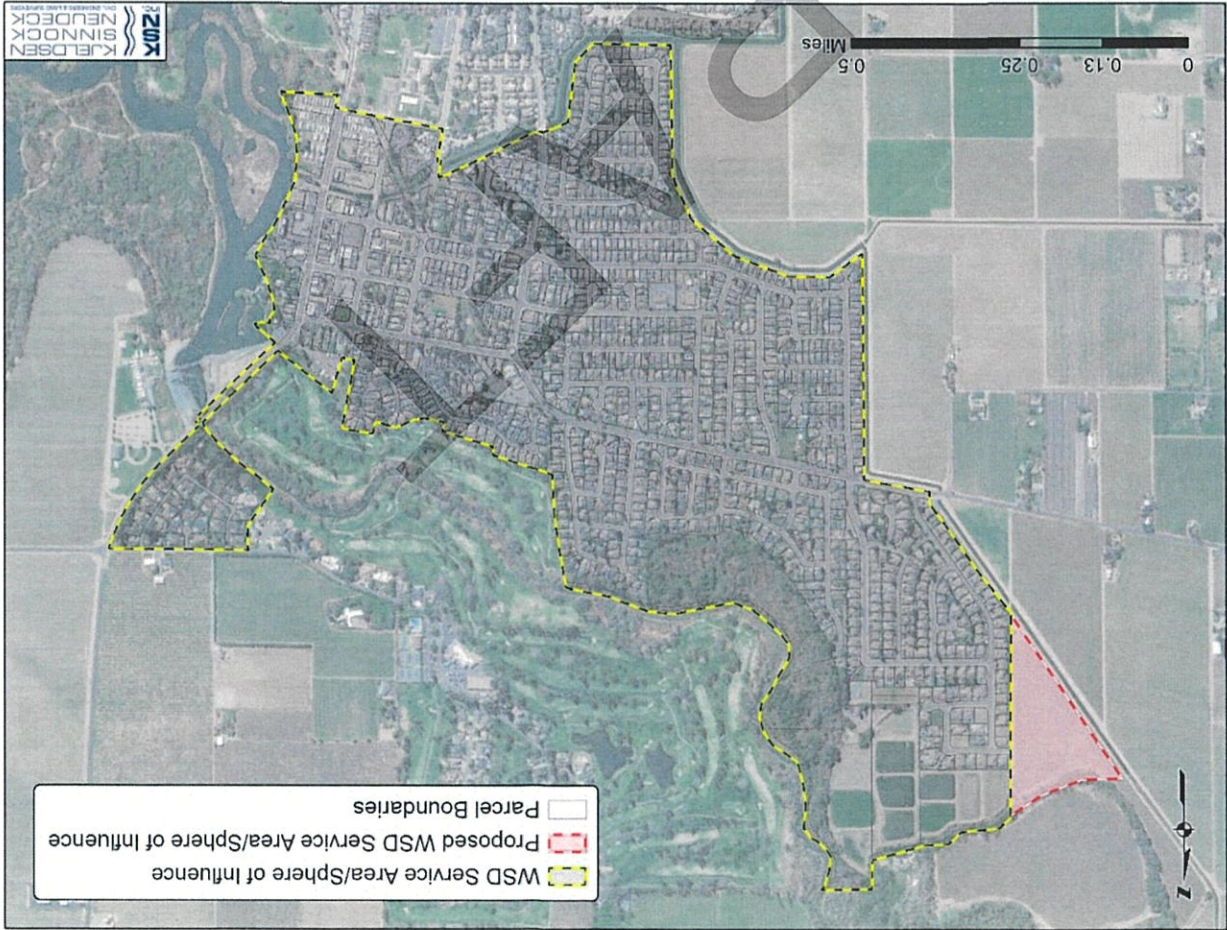


Figure 2-2
 Current Boundaries and the Proposed SOI Amendment Boundary

2.2 PROJECTED POPULATION WITHIN THE SPHERE OF INFLUENCE

Population data for the Woodbridge service area are available from the U.S. Census Bureau from the 2020 Census Data⁵. Based on readily available population data, population estimates for 2010 through 2020 are summarized in Table 2-1. Population within the WSD service area was estimated by calculating the populations at the census block level, which is the smallest geographic unit in the census data, and intersecting this data with the WSD service area boundary. Data was then reapportioned to calculate estimated population within the WSD service area based on census blocks fully or partially contained within the WSD boundary. For blocks partially contained within the boundary, the population was calculated based on the percentage of area within vs. outside the boundary and added to the total district population using the reapportionment tool in the ESRI Community Analyst feature. See Appendix B for a complete list of referenced census data.

⁵ Income and Population Trends in the Past 12 Months (2019 Inflation Adjusted Dollars), <https://data.census.gov/cedsci/all?q=income%20california>

Based on the historical data presented in Table 2-1, the Woodbridge population is expected to have modest, slow growth in the future with population fluctuations being relatively minor (on average 0.54% year to year). Future projected population totals are listed in Table 2-2 and are comprised of complete buildout population within WSD existing boundaries and the proposed SOI amendment territory with 2.8 people per single family residential unit. Given the dwelling unit population density, the additional population from the Rivermist Development with 27 residential units is expected to be 76 persons by the year 2025.

In order to capture the buildout maximum wastewater connections within the WSD boundary, a total of 80 unconnected parcels (infill) totaling 1,363 connections was calculated⁶ as detailed in Table 2-3. Buildout population within WSD boundaries was based on the maximum number of possible connections, and therefore, the estimated population at total buildout with the SOI amendment proposal is 3,892 persons.

⁶ A 2014 KSN WSD Capacity Report references the number of 2014 connections to be 1,269 and states 94 parcels that were not connected. The growth attributable to the difference in connections was calculated to be 14 connections, and therefore, the number of parcels not connected was estimated to be 80 parcels and was incorporated into the estimation of maximum possible connections within WSD, 1,363.

Table 2-1
Population Trends Based on U.S. Census Bureau Data

Year	Population (Persons) ⁽¹⁾	Year-to-Year % Change
2010	3,283	-
2011	3,279	-0.12%
2012	3,298	0.58%
2013	3,335	1.12%
2014	3,369	1.02%
2015	3,389	0.59%
2016	3,421	0.94%
2017	3,464	1.26%
2018	3,501	1.07%
2019	3,499	-0.06%
2020	3,465	-0.97%
2021 (projected) ²	3,484	-
Average Annual % Growth		0.54%

1. Based on data collected from the 2020 Census.
2. Projected from 2010 to 2020 growth rate of 0.54%

Table 2-2

Population Projection to year 2050 (buildout)

Year	Additional Population with Proposed SOI (Persons) ⁽¹⁾	Projected Population within District (Persons) ⁽²⁾	Total Population (Persons)
2021 (projected)	0	19	3,484
2025	76	95	3,636
2035	76	285	3,826
2050 (buildout)	76	66	3,892

1. Due to Rivermist Development 2.8 people per dwelling unit (R-VL Zone). Full buildout by year 2025 with 27 residential units.
 2. 2.8 persons per dwelling unit based on estimated 2021 census population and 1,246 occupied detached residential units per District reporting using an estimated 3.1% vacancy rate from the ACS 2019 5-year census data for Woodbridge, CA.

Table 2-3 categorizes connections and estimates maximum in-fill connections, projecting a population based on 2.8 persons per connection. Maximum connections within WSD are estimated to be 1,363.

Table 2-3

Maximum Infill Connections

Existing Connections within WSD ¹	Maximum Potential Connections within WSD ²
1,283	1,363

1. Reported Connections from WSD financial data
 2. Maximum potential connections within the existing WSD boundaries includes 80 parcels, incorporating recent growth, and are based on the 2014 KSN WSD Capacity Report of 94 unconnected parcels.

2.3 LAFCO DETERMINATIONS

Based on a request of the landowner, WSD is requesting an SOI amendment to include the Rivermist Development. This would require an expansion to the existing SOI boundary. The proposed SOI amendment in the following sections describe the ability of WSD to provide continued services within the existing boundaries and the ability to provide services for the proposed area.

2.3.1 PRESENT AND PLANNED LAND USES

The community of Woodbridge is comprised of unincorporated land within San Joaquin County, and present land use types within the current SOI primarily are a mix of low density residential and medium density residential, 256.7 acres and 54.5 acres, respectively. The present Woodbridge SOI totals approximately 420 acres and is shown in Figure 2-3 with acreage detailed in Table 2-4. Existing development in Woodbridge is primarily residential with a small component of commercial and institutional development along Lower Sacramento Road. The SOI for the community of Woodbridge is considered contiguous with the WSD service area. 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 includes three mobile home parks located along Lower Sacramento Road. WSD does not have the authority to make land use decision or

exercise authority over present or planned land uses with its boundaries. Responsibility for land use decisions is retained by San Joaquin County.

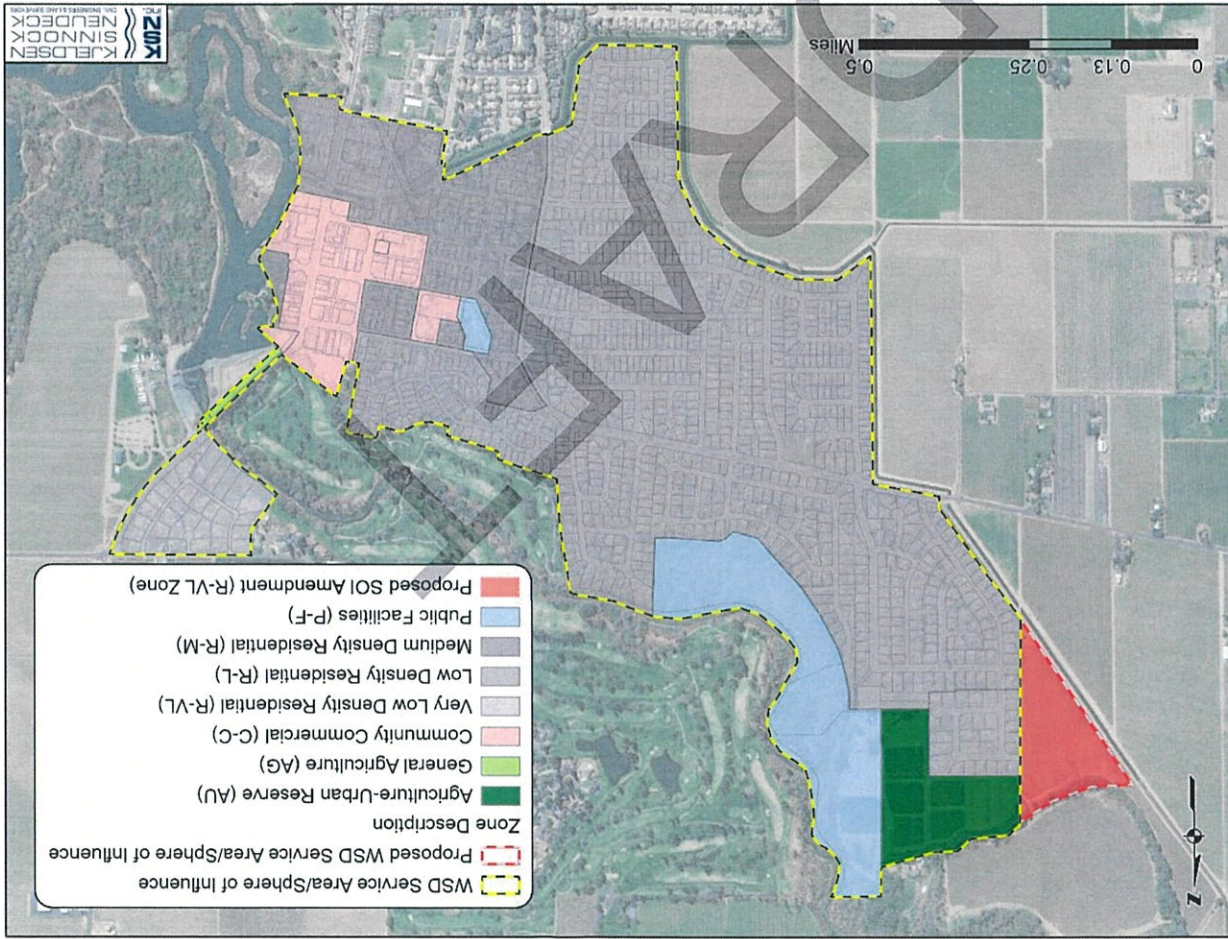


Figure 2-3
Planned Land Uses and Proposed Boundaries

Land Use Type	Total Acreage
Agriculture Urban Reserve	18.7
Community Commercial	27.1
General Agriculture	1.1
Low Density Residential	256.7
Medium Density Residential	54.5
Public Facilities	44.0
Very Low Density Residential	17.9
Total	420.0

Present Land Use Type and Acreage within WSD

Table 2-4

The SOI amendment property is located to the Northwest of the existing SOI and is contiguous with its boundaries. The location of this proposed SOI amendment is shown in red in Figure 2-3. A description that includes parcel number and acreage of the proposed SOI amendment are detailed in Table 2-5. The proposed project site for the SOI amendment is APN 015-020-056 and may require several William Act cancellations.

Parcel Number	Acres	General Plan	Zoning
APN 015-020-56	15.16	AUR	AU-20

Existing Parcel Description for Proposed SOI Amendment

Table 2-5

Source: San Joaquin County GIS data. <http://www.sjmap.org/SurveyorLandRecordsViewer.asp>

Figure 2-2 shows the existing boundary for the community of Woodbridge and WSD service area without land uses. Also shown are the proposed SOI amendment with its unimproved development. This land is zoned as Agricultural-Urban Reserve. San Joaquin County zoning code specifies that this zone is intended to retain in agriculture those areas planned for future urban development in order to facilitate compact, orderly growth and to assure the proper timing and economical provision of services and utilities.

Buildout of the proposed SOI amendment has a total of 27 single family residential units that are estimated by the year 2025 to contribute 76 persons to the total WSD boundary population. The proposed lots are to be zoned as very-low density residential (V-RL Zone) with 2 residential units per acre. This zone is intended as a transition from rural to urban areas. It allows for detached, single-family dwellings on large lots located in existing communities or on the urban fringes. Full urban services are required for development in this zone.

2.3.2 PRESENT AND PROBABLE NEED FOR PUBLIC FACILITIES AND SERVICES

Under its formation documents, WSD is authorized to provide the following services:

3. Wastewater collection, treatment and disposal.
4. Solid waste collection and disposal.

Other than in-project sanitary sewer lines, it is not anticipated at this time that additional wastewater treatment and disposal facilities will be necessary serve existing customers and the area proposed to be added to the Districts SOI.

2.3.3 PRESENT CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES

WSD WWTP capacities, as they are detailed in Section 4 and a previous capacity assessment completed in 2014 by KSN Inc., indicate that WWTP facilities are sufficient to provide service to existing users within the WSD. This determination includes potential growth within the continuous WSD boundary and SOL, with sufficient excess capacity to also serve the area proposed as part of the proposed amended SOL.

At present, WSD wastewater treatment plant has the excess capacity to allow for additional flows. As the population within WSD approaches full buildout, an expansion of facilities is likely not necessary. This is primarily based on the total buildout population with the proposed SOL amendment estimate of 3,892 persons and the wastewater generation rate of 75 gallons per capita per day (GPCD) derived from the current average dry weather flow influent of 0.26 Mgal/d reported for the years 2017 to 2021. The previous 2014 KSN capacity assessment describes WSD treatment and disposal capacity of at least 0.32 Mgal/d ADWF for aerated and percolation ponds with a Imhoff tank digester chamber population capacity of approximately 4,250 persons, which is greater than the projected buildout population of 3,892 persons. Given the same 75 wastewater generation GPCD based ADWF, the total buildout ADWF is estimated to 0.29 Mgal/d, lower than the previous 2014 KSN capacity assessment determination. Further details of WSD WWTP capacity are discussed in Section 4. If WWTP capacity limitations are reached, the treatment pond and disposal pond capacity are likely factors.

2.3.4 EXISTENCE OF SOCIAL AND ECONOMIC COMMUNITIES OF INTEREST

WSD does not currently contain any social or economic communities of interest which are defined in California as "a contiguous population which shares common social and economic interests that should be included within a single district for purposes of its effective and fair representation." The median household income of the Woodbridge community as calculated in the 2020 Final Rate Study was 126.6% of the state median household income and is well above the defined median household income of below 80% that would otherwise qualify the community as a disadvantaged unincorporated community per Section 79505.5 of the California Water Code.

Determination #1: Growth and Population Projections

3.1 CURRENT POPULATION AND DWELLING UNITS

Population estimates for 2010 through 2020 are summarized in Table 3-1. The 2021 population within the existing WSD boundaries is estimated to be 3,484 based on the annual average percentage growth from the U.S. Census Bureau⁷. Similarly, to growth and population projections included in the SOL amendment proposal, the MSR population was estimated by calculating census block level populations, intersecting the data with the WSD service area boundary and then reapportioning population within the existing WSD service area. See Appendix B for a complete list of referenced census data.

Table 3-1
Population Trends Based on U.S. Census Bureau Data

Year	Population (Persons) ⁽¹⁾	Year-to-Year % Change
2010	3,283	--
2011	3,279	-0.12%
2012	3,298	0.58%
2013	3,335	1.12%
2014	3,369	1.02%
2015	3,389	0.59%
2016	3,421	0.94%
2017	3,464	1.26%
2018	3,501	1.07%
2019	3,499	-0.06%
2020	3,465	-0.97%
Average Annual % Growth		0.54%

1. Based on the data collected from the 2020 census.

There is a total of 1,283 reported WSD connections for sewer service within the district boundaries, of which 1,246 are estimated to be occupied based on the 3.1% vacancy rate from the American Community Survey (ACS) 2019 5-year census data for Woodbridge, CA. Persons per dwelling unit is therefore conservatively calculated as 2.8 persons per dwelling unit.

3.2 PROJECTED POPULATION

Projected population for both the existing WSD service area and the proposed SOL amendment for WSD is shown in Table 3-2. Additional population attributable to the proposed SOL amendment is based upon the buildout of the property with 27 residential units completed in the year 2025, and separately, additional population growth within the existing service area is detailed in Table 3-2. Growth up to 2035 is dependent upon the 2010 to 2020 average annual growth

⁷ Income and Population Trends in the Past 12 Months (2019 Inflation Adjusted Dollars) <https://data.census.gov/cedsci/all?q=income%20california>

rate for the area, 0.54%, representing moderate sustained growth. Estimated total population for the future is the sum of projected population within the existed WSD boundaries and additional population with the SOI amendment Rivermist Development proposal. Maximum buildout population (2050) is projected to be 3,892 persons and reaches capacity due to the maximum number of connections within WSD boundaries, 1,363 connections. Existing and maximum potential connections within WSD are listed in Table 3-3. Maximum potential connections within WSD are estimated to be 1,363⁸, and the number of maximum potential connections is used to calculate buildout population within WSD. The proposed SOI amendment territory of 76 persons is added to the WSD growth population to create a total population, 3,892 persons.

Table 3-2
Projected Population within the existing and Proposed

Year	Additional Population with Proposed SOI Amendment (Persons) ⁽¹⁾	Projected Population within District (Persons) ⁽²⁾	Total Population (Persons)
2021(est)	0	19	3,484
2025	76	95	3,636
2035	76	285	3,826
2050 (buildout)	76	66	3,892

1. Due to Rivermist Development, 2.8 people per dwelling unit (R-VL Zone), Full buildout by year 2025 with 27 residential units.
 2. 2.8 persons per dwelling unit based on estimated 2021 census population and 1,246 occupied detached residential units per District reporting using an estimated 3.1% vacancy rate from the ACS 2019 5-year census data for Woodbridge, CA.

Table 3-3
Maximum Infill Connections and Associated Population

Existing Connections within WSD	Maximum Potential Connections within WSD ⁸
1,283	1,363

1. Reported Connections from WSD financial data
 2. Maximum potential connections within the existing WSD boundaries includes 80 parcels, incorporating recent growth, and are based on the 2014 KSN WSD Capacity Report of 94 unconnected parcels.

3.3 DETERMINATIONS

The San Joaquin County General Plan describes residential use standards for population density as the allowable range of dwelling units per gross acres and is calculated by multiplying the maximum number of dwelling units per acre, 2.0 dwelling units per acre in this case, by the average number of persons per dwelling units assumed for the applicable residential designation, in this case 2.8 persons per dwelling unit for Very Low-Density Residential Zoning (R-VL Zone). The proposed SOI amendment territory has a total of 27 single family residential units that are estimated by the year 2025 to contribute 76 persons to the total WSD boundary population. Total buildout population for the existing

⁸ A 2014 KSN WSD Capacity Report references the number of 2014 connections to be 1,269 and states 94 parcels that were not connected. The growth attributable to the difference in connections was calculated to be 14 connections, and therefore, the number of parcels not connected was estimated to be 80 parcels and was incorporated into the estimation of maximum possible connections within WSD, 1,363.

WSD and proposed SOL amendment is estimated to be 3,892. Services described further in Section 4 are expected to be adequate to accommodate the additional contributions from the proposed SOL amendment in the near term and at full buildout.

DRAFT

Determination #2: Present and Planned Capacity of Public Facilities and Adequacy of Public Services, Including Infrastructure or Deficiencies

This element of the Municipal Services Review provides an evaluation of the infrastructure needs and if applicable, identifies potential deficiencies of services provided by the WSD, specifically as they relate to current and future users. This determination addresses the provision of the following services directly provided by WSD, namely wastewater collection and treatment and solid waste disposal.

To qualify for LAFCO approval and inclusion of the proposed SOL amendment area, there must be a determination that the necessary infrastructure and public services exist to support the new users at comparable service levels. The proposed SOL amendment area currently requires no wastewater or solid waste services, as the area is agricultural. However, as the possible Rivermist development takes place, the proposed SOL amendment area will require services. This section of the MSR supports the SOL build-out boundaries.

4.1 WASTEWATER COLLECTION AND TREATMENT

The WSD WWTP is located within the northwestern corner of the WSD boundaries as shown in Figure 4-1. Wastewater within the service is collected and conveyed to the WWTP, entering on the WWTP eastern boundary. WSD utilizes low-cost wastewater treatment facilities that follow the schematic process flow diagram shown in Figure 4-2 to operate. The treatment process provides preliminary (screening), primary, and equivalent secondary levels of treatment for domestic wastewater flows of the community. The influent screen consists of a multi-rake bar screen connected to a washer compactor and that discharges inorganic solids to a dumpster. Primary treatment includes the two, two-story Imhoff tanks, in which sedimentation occurs in the upper compartment and digestion of the settled solids is accomplished in the lower compartment. In these tanks, physical processes effect the removal of settleable solids, suspended and floating solids, and grease. Equivalent secondary treatment process consists of aerated ponds (T1 and T2) which operate in series. The aerated ponds utilize a combination of biological, biochemical, chemical, and physical processes to achieve further reduction of waste constituents. Aeration and mixing of the treatment ponds are accomplished through mechanical aerators. Final treatment disposal is accomplished in the soil through the use of the eight percolation disposal ponds, ponds A-H. While the primary purpose of the percolation ponds is disposal, additional removal of wastewater constituents is accomplished through filtering and straining in the soil. Capacity characteristics of the facilities are listed in Table 4-1. None of the facilities shown schematically in Figure 4-2 are abandoned and all are currently in use.

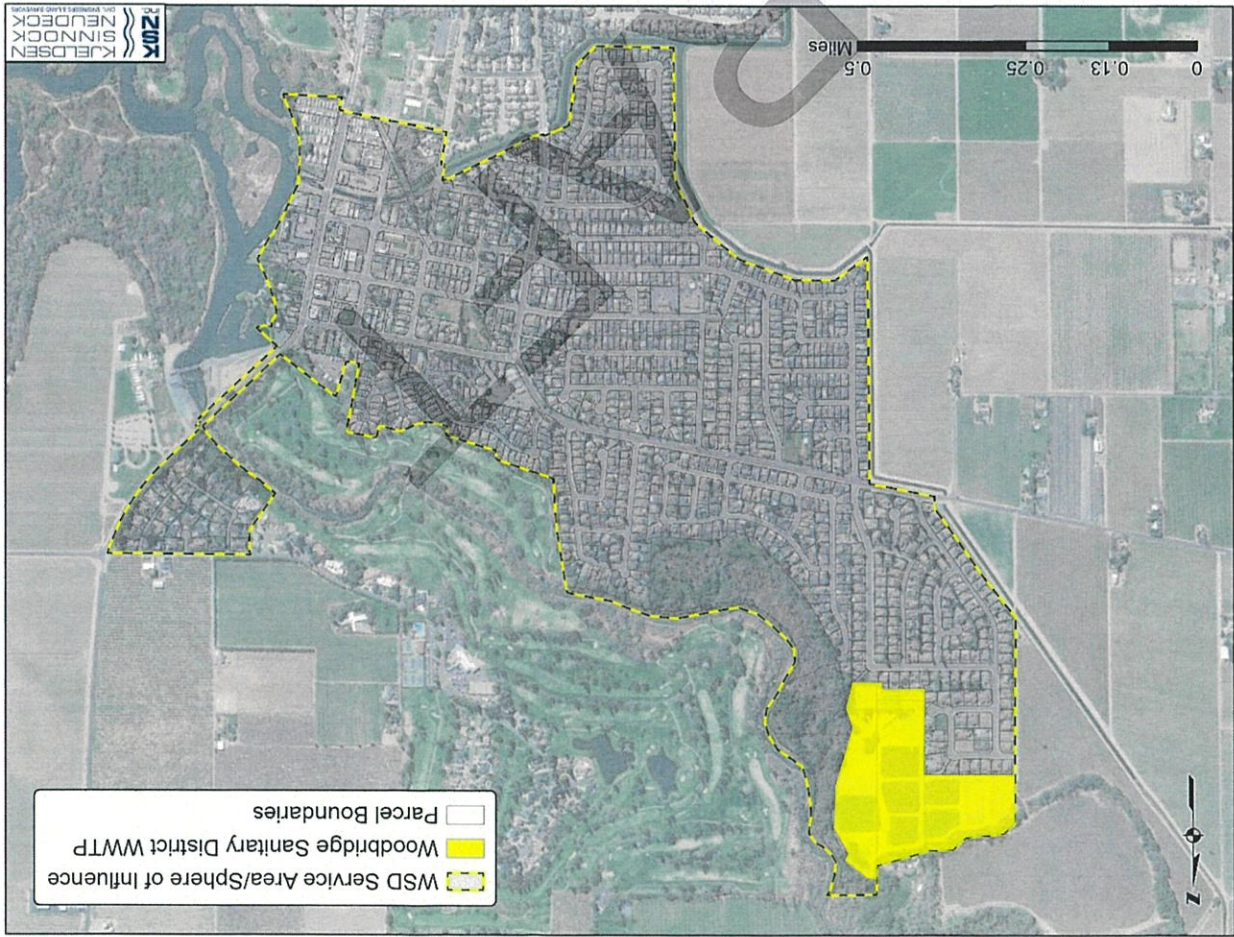


Figure 4-1
WSD WWTP Location within WSD Service Area

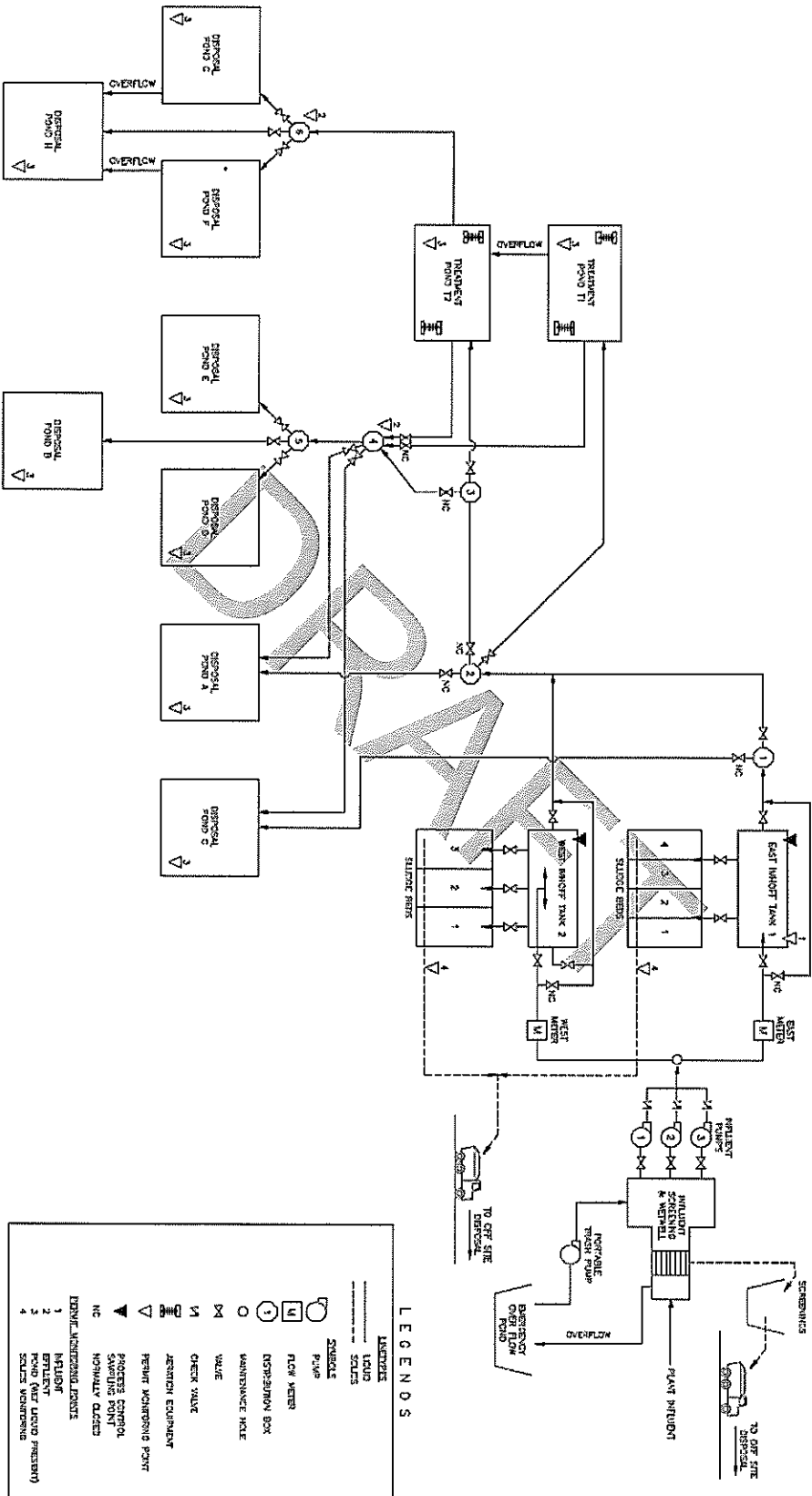


Figure 4.2
WSD WWTP Process Flow Diagram

4.1.1 WASTEWATER COLLECTION SYSTEM

Wastewater is conveyed in pipes through the collection system and discharges into the Imhoff tanks on site at the WWTP. WSD has recently conducted repair and rehabilitation of its collection system through its capital improvement project intended to maintain its ability to continue adequate service. The collection system can be extended and expanded if necessary to serve the proposed SOI amendment area.

4.1.2 WASTEWATER TREATMENT PLANT

WSD wastewater treatment and disposal facilities are regulated by the California Regional Water Quality Control Board under Waste Discharge Requirements (WDRs) Order No.93-213. This Order was adopted on October 22, 1993 and includes requirements for monitoring and reporting and WSD compliance with the permit's "Standard Provisions and Reporting Requirements for Waste Discharge Requirements", dated March 1, 1991 (Standard Provisions).

WWTP facilities capacities, as they are detailed in Table 4-1, indicate that they are all sufficient. Current Average Dry Weather Flow (ADWF) flow based on a population of 3,484 residents and an average wastewater generation of 75 GPCD were calculated to have an ADWF of 0.26 Mgal/d and the inclusion of the proposed development from the SOI amendment in addition to WSD inflow would correspond to a total ADWF of 0.29 Mgal/d. WDR Order No. 93-213 states that the maximum allowable ADWF is listed as 0.5 Mgal/d.

Recently, WSD financed of several onsite wastewater treatment plant improvements, including replacement of the center flow band screen with the multi-rake bar screen, cleaning and coating and rehabilitation of the existing east Imhoff tank, replacement of mechanical piping and gate replacements at the west Imhoff tank, replacement of the emergency generator, SCADA upgrades and remote lift station electrical improvements. This project was financed by a \$1.5M USDA RD Water and Environmental Loan and Grant Program low-interest loan and was essential for WSD to replace and/or rehabilitate existing WSD facilities to reliably operate, increase safety, and improve resiliency against events such as floods in order to provide a critical service to the community of Woodbridge. Construction of the project began in mid-February 2021 and concluded by the end of 2021. A facility layout of the WSD WWTP is shown in Figure 4-3.

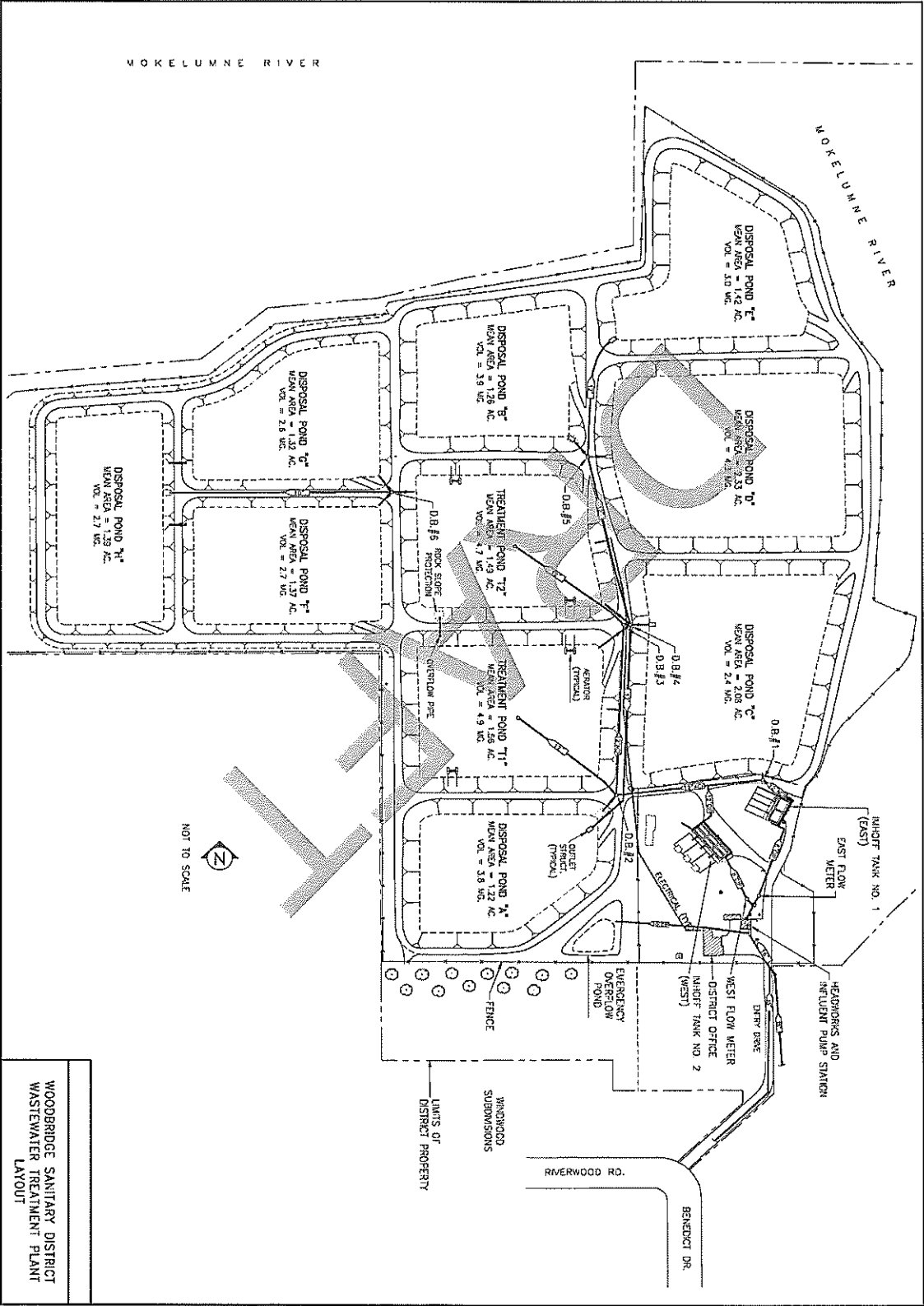


Figure 4-3
WSD WWTP Facility Layout

Table 4-1

WSD WWTP Facility Component Conditions

Facility Component	Performance	Capacity Characteristic
Microscreen	Peak Flow	1.0 Mgal/d
Headworks Pumps	Reliable Peak	0.86 Mgal/d
Pump No. 1	at 26 ft TDH	300 gpm
Pump No. 2	at 26 ft TDH	300 gpm
Pump No. 3	at 26 ft TDH	300 gpm
Imhoff Tank Sedimentation	Surface Area	928 sq. ft
Imhoff Tank No. 1 (East)		490 sq. ft
Imhoff Tank No. 2 (West)		438 sq. ft
Imhoff Tank Digester Chamber	Chamber Volume	13,500 cu. ft
Imhoff Tank No. 1 (East)		6,000 cu. ft
Imhoff Tank No. 2 (West)		7,500 cu. ft
Aerated Treatment Ponds	Pond Volume	9.6 Mgal
T1, 2-10 Hp Aerators		4.9 Mgal
T2, 2-10 Hp Aerators		4.7 Mgal
Disposal Ponds A - E*	Area / Volume	9.2 ac / 15.49 Mgal
Pond A		1.4 ac / 3.38 Mgal
Pond B		1.4 ac / 3.47 Mgal
Pond C		2.3 ac / 2.14 Mgal
Pond D		2.5 ac / 3.83 Mgal
Pond E		1.6 ac / 2.67 Mgal
Disposal Ponds F - H*	Area/Volume	4.2 ac / 7.11 Mgal
Pond F		1.4 ac / 2.40 Mgal
Pond G		1.3 ac / 2.31 Mgal
Pond H		1.5 ac / 2.40 Mgal
Pond Control Panel		120/240V, 3φ, 400A
Backup Generator		100kW, 120/240V, 3φ, 301A
Automatic Transfer Switch		120/240V, 3φ, 400A

*Surface Areas and Volumes computed at 2ft freeboard

Analysis of the additional loads that are the result of projected population future flows is detail in Table 4-2. Current flow conditions for the WWTP are described in the table and inform the total projected loads from which the treatment capacity is assessed. Appendix C details a WSD WWTP water balance and Appendix D presents summary results of a wastewater generation and treatment capacity evaluation.

Table 4-2
Current and Future Flows and Loads

CURRENT WASTEWATER CHARACTERISTICS				CURRENT FLOW CONDITIONS			
		Avg Influent BOD ₅	Mgal/day	0.26			C
	lb/d						(ADWF)
		Avg Influent SS		3,484			S
	lb/d						Service Population (total capita)
	lb/cap/d	Avg Influent BOD ₅	gal/person/d	75			O
							Occupied Residential Connections
	lb/cap/d						Flow per capita
				2.8			O
							Occupancy/residential connection (Existing & Rivermist)
ADDITIONAL LOADS							
			Population	39			W
	SS						Within WSD
		Flow (gal/d)		8,102			C
	SS						Connected, Unoccupied (C,U)
			Population	224			N
							ot Connected, W/in WSD (NC, W/in)
	SS	Flow (gal/d)		16,717			O
							outside of WSD
			EDUs	27			R
							ivermist Development
TOTAL PROJECTED LOADS							
			Population	3,593			W
	SS	Flow (Mgal/d)					Within WSD
				1,283			(1) Current + C, U
							W/in WSD
				1,363			(2) Current + C, U + Not Connected,
	SS	Flow (Mgal/d)					W/in WSD
			EDUs	1,390			W
							Within & Outside of WSD
			Population	3,892			(3) All projected loads w/in district + Rivermist Development (27 RU)

4.2 SOLID WASTE SERVICES

WSD entered into a contract with Cal Waste Recovery Systems (Cal Waste) in March of 2018 for which it was agreed upon that Cal Wates would provide garbage yard waste and recyclable materials collection services for the WSD. Effective July 2021, new monthly rates for residential and weekly rates for commercial garbage collection services within the WSD as detailed in Appendix A.

4.2.3 SOLID WASTE COLLECTION, TRANSPORTATION AND DISPOSAL

Appendix A shows Resolution No. 2021-07 which details a resolution set forth by the WSD Board of Directors for increasing garbage collection, yard waste and recycling material collection fees. The document outlines residential service rates, commercial service rates for containers, commercial rates for commercial waste card and industrial bin rates, and Handy Hauler service rates for solid waste collection.

4.3 DETERMINATIONS

The existing WSD treatment and disposal facilities currently have available capacity to accommodate at least 0.32 Mgal/d of future ADWF. As the population within existing WSD boundaries approaches full buildout, an expansion of facilities is likely not necessary. The wastewater generation rate of 75 GPCD derived from the current ADWF, 0.26

Mgal/d, reported for the years 2017 to 2021 confirms that current and buildout flows are within the previous 2014 KSN capacity assessment, 0.32 Mgal/d. The 2014 KSN capacity assessment details a WSD treatment and disposal capacity of at least 0.32 Mgal/d ADWF for aerated and percolation ponds with a Imhoff tank digester chamber population capacity of approximately 4,250 persons, which is greater than the projected WSD population with the proposed SOI amendment of 3,892 persons.

Given the same 75 GPCD wastewater generation rate, total WSD ADWF flows, including the proposed SOI amendment development, is estimated to 0.29 Mgal/d and within the previous capacity assessment, 0.32 Mgal/d. It is anticipated that solid waste disposal provided by Cal Waste will be capable of extending services to the proposed SOI amendment; however, an update to the 2018 agreement between Cal Waste and WSD is needed to extend services to the coterminal WSD and SOI boundaries.

DRAFT

Determination #3: Financial Ability of the Agency to Provide Service

This section of the Municipal Services Review describes the financing system currently in place that provides WSD with the ability to fund all of the services currently provided to the developed areas within the SOL.

5.1 FINANCING

WSD infrastructure and operational financing is conducted through several channels, property taxes, interest revenue, and direct assessments. Analysis of revenue requirement compares the revenues of the utility to its operating and capital costs to determine the adequacy of existing rates to recover the utility's costs. Components of revenue requirement include capital improvement costs, system rehabilitation costs, operations and maintenance costs, and operating reserve costs. Non-rate revenue credited against the projected costs include interest income, solid waste franchise revenue, property taxes and transfer of restricted reserves for capital improvement project costs.

The present sewer service demand within WSD boundaries can be met with existing facilities and infrastructure. The most recent WSD rate study completed via Hansford Economic Consulting LLC in the year 2020 determines the level of funding required over the subsequent six years to sufficiently fund service provisions, and the fees to be collected from customers to achieve that level of funding. As a conservative practice, the recent 2020 Rate Study included no growth in its financial projection.

Per the 2020 Rate Study, rehabilitation was included in the rates 2015 and WSD has put that revenue toward a major project that will be completed in 2020. WSD has a letter of conditions currently with USDA for a \$1.5 million loan with a repayment period of 40 years.⁹ The 2020 Rate Study states that "meeting loan requirements is important going forward." Discussion of the USDA loan is included in Section Woodbridge Sanitary District Debt.

⁹ A major assumption stated regarding the USDA Treatment Plant Financing in the WSD 2020 Rate Study is that the rate study accounts for the \$1.50 million USDA loan that the WSD has secured for phase one wastewater treatment plant upgrades; it also assumes that WSD secures a second USDA loan within another three years to pay for phase two of necessary improvements at the wastewater treatment plant.

The rate study concluded the need to increase wastewater rates based on the following conditions:

- To generate sufficient revenue to provide reliable wastewater service and prudent reserve;
- To sustain ongoing operations and maintenance, and
- To fund debt service and necessary capital improvement projects to remain compliant with local, state and federally-mandated regulations.

In the rate study, an increase in annual fees was deemed necessary for all customers over a six-year period. The impact of the rate increases is greater on higher-strength wastewater customers. By the end of year 6, with implementation of the proposed rates, it is projected that revenue sufficiency will be achieved to cover all projected costs within the six-year period and that WSD will have \$250,000 in the capital fund and 7.5 months of operating expenses available in unrestricted funds. These fees are listed in Table 5-1 and were approved by the WSD board.

Table 5-1

2020 Rate Study Proposed Maximum Fees Schedule

Land Use	Current Year	2020-21 Year 1	2021-22 Year 2	2022-23 Year 3	2023-24 Year 4	2024-25 Year 5	2025-26 Year 6
Detached Residential							
1 Bedroom	\$217.76	\$238.69	\$260.70	\$279.63	\$316.34	\$320.16	\$337.91
2 Bedroom	\$290.35	\$318.25	\$347.60	\$372.84	\$421.78	\$426.89	\$450.54
3 Bedroom	\$362.94	\$397.81	\$434.50	\$466.05	\$527.23	\$533.61	\$563.18
4 Bedroom	\$435.52	\$477.37	\$521.40	\$559.26	\$632.68	\$640.33	\$675.81
5 Bedroom	\$508.11	\$556.94	\$608.30	\$652.47	\$738.12	\$747.05	\$788.45
6 Bedroom	\$580.70	\$636.50	\$695.20	\$745.68	\$843.57	\$853.77	\$901.08
7 Bedroom	\$653.29	\$716.06	\$782.10	\$838.89	\$949.01	\$960.49	\$1,013.72
8 Bedroom	\$725.87	\$795.62	\$869.00	\$932.10	\$1,054.46	\$1,067.21	\$1,126.35
Low Strength Commercial							
Commercial Annual Rate per EDU							
Office	\$266.94	\$286.42	\$311.59	\$334.69	\$375.42	\$380.25	\$403.22
Veterinary Clinic	\$266.94	\$286.42	\$311.59	\$334.69	\$375.42	\$380.25	\$403.22
Beauty	\$265.34	\$296.11	\$322.55	\$346.29	\$389.52	\$394.44	\$417.62
Retail	\$280.03	\$304.36	\$331.89	\$356.19	\$401.55	\$406.53	\$429.89
Unclassified Low Strength	\$260.00	\$288.69	\$314.16	\$337.41	\$378.72	\$383.57	\$406.60
Medium Strength Commercial							
Commercial Annual Rate per EDU							
Retirement Home	\$276.65	\$303.96	\$331.27	\$358.58	\$385.89	\$413.20	\$440.51
Mobile Home Park	\$290.35	\$317.05	\$343.75	\$370.45	\$397.14	\$423.84	\$450.54
Apartments / Condos	\$290.35	\$317.05	\$343.75	\$370.45	\$397.14	\$423.84	\$450.54
Public Meeting Place	\$290.35	\$317.05	\$343.75	\$370.45	\$397.14	\$423.84	\$450.54
Mtg. Place - Religious	\$290.35	\$317.05	\$343.75	\$370.45	\$397.14	\$423.84	\$450.54
Bar	\$284.76	\$313.67	\$342.58	\$371.49	\$400.39	\$429.30	\$458.21
Service Station no Garage	\$293.81	\$324.44	\$355.06	\$385.69	\$416.32	\$446.94	\$477.57
Unclassified Medium Strength	\$281.16	\$309.41	\$337.66	\$365.90	\$394.15	\$422.40	\$450.65
High Strength Commercial							
Commercial Annual Rate per EDU							
Dump Station	\$2,658.51	\$3,120.18	\$3,581.85	\$4,043.51	\$4,505.18	\$4,966.85	\$5,428.52
RV Park w/o Sewer	\$2,658.51	\$3,120.18	\$3,581.85	\$4,043.51	\$4,505.18	\$4,966.85	\$5,428.52
Restaurant	\$444.79	\$502.09	\$559.39	\$616.69	\$673.99	\$731.28	\$788.58
Unclassified High Strength	\$538.33	\$593.86	\$649.39	\$704.93	\$760.46	\$815.99	\$871.52

1. If a business locates to Woodbridge that does not fit any one customer category listed, WSD should determine which strength the customer belongs to and charge the unclassified cost per EDU shown until a rate study is conducted that includes the new customer category.

5.1.1 WASTEWATER SERVICES

This review of the WSD financial data indicates that WSD can reasonably expect to obtain sufficient revenues to provide adequate services within the WSD service area. This conclusion is primarily based on the 2020 Rate Study and the Independent Auditors' Report completed by Schwartz Giannini Lantsberger & Adamson for the year ended June 30, 2020.

In addition to their share of property taxes and interest revenue, WSD received revenue from direct assessments from benefiting properties in order to cover the cost of providing services. Property-related fees (rates) are exempt from Proposition 26 but are subject to California Constitution Article XIII D (Prop 218) requirements for water, wastewater, and solid waste property related fees. WSD is following utility rate setting best practices outlined in the 2020 Rate Study. Wastewater rates are calculated using the functional cost allocation method, and the following four steps outlined below detail the methodology cited in the 2020 Rate Study.

1. Establish the Wastewater Customer Base and User Characteristics
2. Project Revenue Requirement and Allocate to Collection and Treatment
3. Allocate Revenue Requirement based on Flows and Loads and Determine Unit Costs
4. Determine Revenue Requirement by Customer Type

The analysis was based upon a model that projects revenues and expenses, and calculates annual customer rates. The previous rate study for WSD was conducted in 2015 which incorporated rehabilitation rates for the collection system that were intended to provide for the maintenance of existing infrastructure. WSD reported total direct charges of \$674,846.42 per 2020-2021 WSD reporting to San Joaquin County, Auditor-Controller, Property Tax Division.

5.1.1.1. Expenditures

A detailed list of WSD expenses is listed in Appendix E. Major expenses for WSD include salaries, Utilities, Collection and WWTP maintenance and repairs, loan repayment, and short-lived assets/depreciation. Total expenditures for the 2021 to 2022 is projected to be \$778,126 per the approved WSD budget.

5.1.1.2. Revenues

A detailed list of WSD revenues is listed in Appendix E. Sources of revenue as listed in the approved budget for 2021 to 2022 are direct assessments, solid waste franchise fees, property tax, interest, and transfers in from restricted funds. Total income for 2021 to 2022 is projected to be \$867,307 per the approved WSD budget.

5.1.1.3. Annual Budgets

Revenue sources for WSD as listed in the approved budget for 2021-22 are as follows:

- Direct Assessments
- Solid Waste Franchise Fee
- Property Tax Interest
- Transfer in from Restricted Funds

Total income from the approved budget for 2020-21 was \$727,649 while actual income was \$681,855 for the months of July through May, and total income from the approved budget for 2021-22 was \$867,307. Net budget surplus is

anticipated to be \$89,181 for 2021-22. Fund balance as of the May 31, 2021 was \$645,109. The approved WSD budget for 2021 to 2022 is shown in Appendix E. Revenues and expenses are also detailed for the preceding year. WSD does not utilize formal budgetary procedures and is not required to adopt such procedures by law. However, the District does adopt a non-appropriated budget annually which is approved by the Board of Directors¹⁰. Projected WSD cash flow as detailed in the 2020 Rate Study with rate increases is shown in Table 5-2. For the year of 2024 to 2025 estimated unrestricted ending cash balance is projected to be below the target minimum balance.

Table 5-2
Projected Cash flow for WSD

Revenues and Expenses	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Revenues							
Current Rate Revenues	\$562,941	\$562,941	\$562,941	\$562,941	\$562,941	\$562,941	\$562,941
Rate Increase Additional Revenues ¹		\$49,176	\$117,186	\$168,514	\$259,494	\$277,023	\$325,739
Op. Fund Interest Income	\$8,333	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Total Revenues	\$571,274	\$617,117	\$685,127	\$736,455	\$827,435	\$844,965	\$893,680
Expenses							
Operating Expenses	\$545,773	\$591,840	\$609,595	\$627,883	\$743,320	\$666,121	\$686,105
Net Revenue before Debt Service and System Rehabilitation	\$25,501	\$25,277	\$75,532	\$108,572	\$84,116	\$178,844	\$207,575
Debt Service	\$0	\$31,150	\$62,300	\$62,300	\$82,775	\$103,250	\$103,250
Estimated Coverage Ratio ²	n.a.	0.81	1.21	1.74	1.02	1.73	2.01
Capital Improvements	\$0	\$4,000	\$112,752	\$0	\$61,903	\$423,610	\$0
Cash-Funded	\$25,501	(\$9,873)	(\$99,521)	\$46,272	(\$60,562)	(\$348,016)	\$104,325
Net Operating Revenue	\$701,938	\$794,822	\$805,637	\$768,541	\$878,498	\$858,809	\$572,974
Beginning Balance ³	\$25,501	(\$9,873)	(\$99,521)	\$46,272	(\$60,562)	(\$348,016)	\$104,325
Net Operating Revenue	\$25,501	(\$9,873)	(\$99,521)	\$46,272	(\$60,562)	(\$348,016)	\$104,325
Property Tax	\$53,438	\$54,507	\$55,597	\$56,709	\$57,843	\$59,000	\$60,180
Solid Waste Franchise Tax	\$9,397	\$9,491	\$9,586	\$9,682	\$9,779	\$9,877	\$9,976
Interest	\$3,366	\$3,419	\$3,471	\$3,524	\$3,576	\$3,629	\$3,682
Transfers Out to Restricted Funds	\$0	(\$46,230)	(\$46,230)	(\$46,230)	(\$70,325)	(\$70,325)	(\$70,325)
Transfer In from Short-Lived Asset Reserves	\$0	\$0	\$40,000	\$40,000	\$40,000	\$60,000	\$0
Sewer Connection Fees	\$5,611	\$0	\$0	\$0	\$0	\$0	\$0
Backflow Protection for WSD WWTP Office	(\$4,930)	\$0	\$0	\$0	\$0	\$0	\$0
Estimated Ending Unrestricted Cash Balance	\$794,322	\$805,637	\$768,541	\$878,498	\$858,809	\$572,974	\$680,811
Target Minimum Balance ⁴	\$613,849	\$644,560	\$656,397	\$668,589	\$745,546	\$694,081	\$707,403

Source: HEC

1. The first year of the rate increase is only for ten months of the fiscal year.
2. Minimum of 1.10 advisable; target of 1.25.
3. Includes all unrestricted funds.
4. The target is \$250,000 in the capital fund plus 8 months of operating expenses.

¹⁰ Year ended June 30, 2020 Woodbridge Sanitary District Annual Report Notes to Financial Statements

5.1.1.4. Investments

For the year ending June 30, 2020 WSD cash flows from investing activities received \$24,907 net cash from investing activities. Net position is categorized as net investment in capital assets, restricted, and unrestricted, as follows:

- Net investments in capital assets—Consists of capital assets, net of accumulated depreciation and reduced by the outstanding balances of any borrowings that are attributable to the acquisition, construction or improvement of those assets.
- Restricted—Consists of restricted assets reduced by liabilities and deferred inflows of resources related to these assets.
- Unrestricted—Amounts not required to be reported in other components of net position.

As of June 30, 2020, the carrying amount in the WSD's investment in external investment pool with the San Joaquin County Treasury was \$763,585. Cash held by the San Joaquin County Treasury is pooled with other County deposits for investment purposes by the County Treasurer in accordance with the investment policy of the County Treasurer. WSD does not maintain a formal investment policy.

5.1.1.5. Reserve Accounts

Per the 2020 Rate Study, WSD has approximately \$794,000 in unrestricted reserves (\$186,000 in the capital fund and \$608,000 in other funds combined), the latter of which provides about 13 months of operating expenditure. These reserves can serve as a bridge for cash flow needs, unplanned emergency repairs, planned improvements, and provide rate stabilization. A WSD policy is in place to maintain capital reserves at a minimum of \$250,000. In the rate study, an increase in annual fees was deemed necessary for all customers over the next six years, the end of year 6, with implementation of the proposed rates, it is projected that revenue sufficiency will be achieved to cover all projected costs within the six-year period and that WSD will have \$250,000 in the capital fund and 7.5 months of operating expenses available in unrestricted funds.

5.1.1.6. Woodbridge Sanitary District Debt

The WSD 2019 Modernization Project was intended to replace and/or rehabilitate existing WSD facilities to reliably operate, increase safety, and improve resiliency against events such as floods in order to provide a critical service to the community of Woodbridge. It consisted of several onsite wastewater treatment plant improvements, including replacement of the center flow band screen with the multi-rake bar screen, cleaning and coating and rehabilitation of the existing east Imhoff tank, replacement of mechanical piping and gate replacements at the west Imhoff tank, replacement of the emergency generator, SCADA upgrades and remote lift station electrical improvements. This project was financed by a \$1.5M USDA RD Water and Environmental Loan and Grant Program low-interest loan and construction of the project began in mid-February 2021 and concluded by the end of 2021. This project objective was to significantly improve the system's reliability and enhance the district's ability to operate their wastewater treatment plant and lift stations that pump wastewater to the plant.

5.1.1.7. Financial Audit

The Independent Auditors' Report completed by Schwartz Giannini Lantsberger & Adamson found that for the year ended June 30, 2020, changes in financial position and cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

5.2 OPPORTUNITIES TO INCREASE REVENUE

The WSD and WSD Board of Directors have the following opportunities to increase revenue to fund WSD services:

- Increase utility user charges to reduce the amount of general tax money need to fund utility services. This method to increase revenue would trigger the statutory requirement for a protest ballot vote contained within Proposition 218 requirements. Per the 2020 Rate Study, increased fee implementation process began with the mailing of notices on May 8th, 2020. WSD conducted a public hearing to adopt the proposed rate increase on June 24, 2020. The rate increase, Resolution 2020-04, was adopted by and approved on July 29, 2020.
- Increase the special tax rate.

Rate increases for solid waste collection and disposal are allowable under the Current Waste Management solid waste disposal agreement allows for certain rate increases directly tied to the increasing cost of the services provided by Cal Waste to WSD. These rate increases would be applied directly to the provision of collection services discussed further in Appendix A. WSD last approved an increase to the rates charged by Cal Waste in May of 2020.

5.3 DETERMINATION

The proposed SOI amendment would increase property tax revenues, direct assessments revenue and solid waste franchise fee revenue while not contributing substantial to overall WSD expenses. Additionally, with the implementation of proposed rates by the year 2026, it is projected that revenue sufficiency will be achieved to cover all projected costs within the six-year period and that WSD will have \$250,000 in the capital fund and 7.5 months of operating expenses available in unrestricted funds.

Determination #4: Status of, and Opportunities for, Shared Facilities

Section 6

This section is a review of the current use of shared facilities by WSD and the opportunity for sharing additional facilities and resources.

6.1 CURRENT AND FUTURE POTENTIAL SHARED FACILITIES

WSD's sewer system was built for a defined area for which property taxes and special assessments are being paid by the users for the service and does not offer opportunities for sharing facilities with other agencies.

6.2 DETERMINATION

Given the narrow range of services provided, geographic location, and generally limited facilities, opportunities for shared facilities are limited. The sewer collection system for WSD has been designed to serve the WSD service area. WSD maintains the sewer collection system and WWTP. As such, there are currently no plans for sharing facilities.

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Determination #5: Accountability for Community Service Needs, Including Governmental Structure and Operational Efficiencies

This section assesses the level of accountability of WSD to those it serves, focusing on the public accessibility opportunities for public participation.

7.1 GOVERNMENTAL MANAGEMENT AND STRUCTURE

Special districts are local governments created by the people of a community to deliver specialized services essential to their health, safety, economy and well-being. A community forms a special district, which are political subdivisions authorized through a state's statutes, to provide specialized services the local city or county do not provide. WSD and several other San Joaquin County special districts provided services and infrastructure with their respective SOL.

7.1.1 WOODBRIDGE SANITARY DISTRICT

WSD is governed by a 5-member board of directors who are elected to serve by the people. Board members serve 4-year terms, and current board members through 2021 are below.

Name	Board Position/Title
Douglas Colucci	President
Larry Norvall	Vice President
Pat Piccardo	Director
Mary Avanti	Director
Terry Wells-Brown	Director

WSD also employees a 13 staff for which reported 2020 wages totaled \$170,261. Employees are defined as the number of people who received a W-2 for the calendar year, Elected Officials (including those who received pay reported on IRS Form 1099), and all board members (compensated or uncompensated). Employees who work multiple positions, partial, and/or part-time are counted as one (1) employee. Contracted positions are not included.

7.1.2 PUBLIC INFORMATION AND PARTICIPATION

The Woodbridge Sanitary District Board of Directors meet on the second Wednesday of each month and also schedules special meetings when needed with public notices posted in accordance with the Brown Act. Regarding transparency and efficiency, WSD states that it is committed to operating in a transparent manner, and posts relevant financial and operational documents to our site as they become available, including financial transaction reports and board member and staff compensation.

7.2 EVALUATION OF MANAGEMENT EFFICIENCIES

WSD is a member of the California Special Districts Association (CSDA), a 501(c)(6), not-for-profit association that was formed in 1969 to promote good governance and improved core local services through professional development.

advocacy, and other services for all types of independent special districts. Per the WSD mission statement, WSD manages its wastewater in a way that protects public health and the environment and provides cost-effective service to its customers. In addition, the WSD published customer service goals state that the Board of Directors and staff are "here to provide good customer service and serve the community."

7.3 DETERMINATION

Alternatives for variation in governance structures is limited due to the constraints of WSD's relatively small size and limited class of services provided. The community of Woodbridge is served by several special districts that provided limited services as outlined above. In addition, sufficient access and information for public participation regarding services is provided via monthly meetings. Services provided by WSD that include collection, treatment, disposal of wastewater and solid waste are reasonably assumed to be the most efficient structure based on already existing operations and services. Alternative structures to governance would have to be thoroughly studied before making commitments to any governance restructuring.

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Determination #6: Relationship to Disadvantage Unincorporated Communities

Per Senate Bill (SB244), an additional determination for the Municipal Services Review was added to the LAFCO review process regarding Disadvantaged Unincorporated Communities (DUC). A DUC is an inhabited area, as defined by Section 56046, or as determined by commission policy, that constitutes all or a portion of a "disadvantaged community" as defined by Section 79505.5 of the California Water Code. A "disadvantaged community" is defined as a community with an annual median household income that is less than 80 percent of the statewide annual median household income. The legislative intent is to prohibit "cherry picking" by cities of tax-generating land uses while leaving out underserved, inhabited areas with infrastructure deficiencies and lack of access to reliable potable water and wastewater services. DUCs are recognized as social and economic communities of interest for purposes of recommending SOI determinations pursuant to Section 56425(c).

8.1 DEMOGRAPHICS

Based on the 2020 Final Rate Study, Woodbridge is not considered Disadvantaged by the State of California because WSD's median household income of Woodbridge was reported to be 126.6% of the state median household income. This is well above the defined median household income that would qualify as a disadvantaged community per Section 79505.5 of the California Water Code and is not identified by San Joaquin County as a DUC.

8.2 PUBLIC SERVICES

WSD services are sufficient to meet the needs of the exiting population within the service boundary and proposed SOI amendment.

8.3 DETERMINATION

The proposed SOI amendment area and WSD service area do not contain any DUC's and therefore it is not an applicable element for the WSD MSR.

Solid Waste Disposal Agreement with Cal-Waste

Appendix A

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RESOLUTION NO. 2021-07

RESOLUTION OF THE BOARD OF DIRECTORS OF THE
WOODBIDGE SANITARY DISTRICT
INCREASING GARBAGE COLLECTION, YARD WASTE AND RECYCLING MATERIAL
COLLECTION FEES

WHEREAS, the Woodbridge Sanitary District ("District") and Cal Waste Recovery Systems ("Cal Waste") entered into a contract in March of 2018 through which Cal Waste provides garbage, yard waste and recyclable materials collection services for the District; and

WHEREAS, subject to the District's approval the contract allows for adjustments to the rates charged by Cal Waste beginning in July of 2019 and annually thereafter; and

WHEREAS, the District last approved an increase to the rates charged by Cal Waste in May of 2020; and

WHEREAS, the Contract's provision to allow for certain rate increases is directly tied to the increasing cost of the services provided by Cal Waste to the District; and

WHEREAS, Cal Waste's increased rates will be applied directly to providing the collections services discussed herein.

NOW, THEREFORE, the Board of Directors District does hereby RESOLVE, ORDER and ELUCT as follows: The new monthly rates for residential and weekly rates for commercial garbage collection services within the Woodbridge Sanitary District, effective July 1, 2021, will be as set forth below:

1. The Residential Service Rates is set forth in Exhibit A attached hereto;
2. The Commercial Service Rate for Containers is set forth in Exhibit B attached hereto;
3. Commercial Rates for Commercial Waste Cart and Industrial Bin Rates is set forth in Exhibit C attached hereto;
4. The Handy Hauler Service Rates as set forth in Exhibit D attached hereto

PASSED AND ADOPTED at a regular meeting of the Board of Directors of the Woodbridge Sanitary District, this 9th day of June 2021 by the following vote:

AYES: Douglas Colucci, Larry Norvall, Mary Avanti, Terry Wells-Brown, Patrick Piccaro

NOES: None

ABSENT: None

ABSTAINING: None

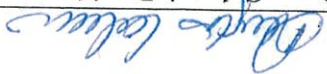
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Irlanda Mora, Board Secretary



ATTEST:

Doug Colucci, President



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EXHIBIT A

EXHIBIT "A"

WOODBIDGE SANITARY DISTRICT
RESIDENTIAL SERVICE RATES

EFFECTIVE 07/01/2021

<u>Basic Residential Service</u>	
One 38 - Gallon Trash Cart	\$29.73
Two 38 - Gallon Trash Carts	\$59.46
Three 38 - Gallon Trash Carts	\$100.21
One 64 - Gallon Trash Cart	\$44.85
One 96 - Gallon Trash Cart	\$98.43
Each Additional 96 - Gallon Recycling Cart	\$11.07
Each Additional 96 - Gallon Yard & Garden Cart	\$11.07
<u>Low Volume Residential Service</u>	
One 20 Gallon Mini Trash Cart	\$19.28
<u>Residential Backyard Service</u>	
Backyard Service	\$17.72
<u>EXTRAS & SPECIALS</u>	
<u>Residential Services</u>	
1 Extra pick-up (on scheduled service day)-20 Gallon	\$10.75
2 Extra pick-up (on scheduled service day)-38 Gallon	\$15.97
3 Extra pick-up (on scheduled service day)-64 Gallon	\$23.53
4 Extra pick-up (on scheduled service day)-96 Gallon	\$50.32
1 Special pick-up (on non-scheduled service day)-20 G	\$16.53
2 Special pick-up (on non-scheduled service day)-38 G	\$24.89
3 Special pick-up (on non-scheduled service day)-64 G	\$36.98
4 Special pick-up (on non-scheduled service day)-96 G	\$79.85
Pickup of Refrigerator, Freezer, or A/C Unit containing Freon or oil during Spring Cleanup.	\$46.88

Monthly Rate

Monthly Rate

\$19.28

Additional

Monthly Rate

\$17.72

Rate per Each

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EXHIBIT B

EXHIBIT "B"

WOODBIDGE SANITARY DISTRICT

COMMERCIAL TRASH RATES FOR CONTAINERS

EFFECTIVE 07/01/2021

WEEKLY SERVICE

No. of Containers	Size of Containers	Number of Times Serviced Per Week				
		1	2	3	4	5
1	1-yd	\$87.67	\$175.33	\$263.00	\$350.66	\$438.33
2	1-yd	\$131.49	\$263.00	\$394.49	\$525.99	\$657.49
3	1-yd	\$175.33	\$350.66	\$525.99	\$701.32	\$876.65
1	2-yd	\$122.69	\$245.38	\$368.08	\$490.77	\$613.46
2	2-yd	\$184.04	\$368.08	\$552.11	\$736.15	\$920.19
3	2-yd	\$245.38	\$490.77	\$736.15	\$981.53	\$1,226.92
1	3-yd	\$168.72	\$337.44	\$506.16	\$674.89	\$843.60
2	3-yd	\$253.09	\$506.16	\$759.25	\$1,012.33	\$1,265.41
3	3-yd	\$337.44	\$674.89	\$1,012.33	\$1,349.77	\$1,687.22
1	4-yd	\$199.38	\$398.75	\$598.14	\$797.52	\$996.89
2	4-yd	\$299.07	\$598.14	\$897.20	\$1,196.27	\$1,495.34
3	4-yd	\$398.75	\$797.52	\$1,196.27	\$1,595.04	\$1,993.79
1	5-yd	\$221.28	\$442.55	\$663.83	\$885.09	\$1,106.37
2	5-yd	\$331.91	\$663.83	\$995.73	\$1,327.64	\$1,659.55
3	5-yd	\$442.55	\$885.09	\$1,327.64	\$1,770.19	\$2,212.74
1	6-yd	\$241.98	\$483.97	\$725.95	\$967.92	\$1,209.91
2	6-yd	\$362.97	\$725.95	\$1,088.91	\$1,451.89	\$1,814.86
3	6-yd	\$483.97	\$967.92	\$1,451.89	\$1,935.85	\$2,419.81

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EXHIBIT C

EXHIBIT "C"
WOODBRIIDGE SANITARY DISTRICT
COMMERCIAL WASTE CART & INDUSTRIAL BIN RATES
EFFECTIVE 07/01/2021

COMMERCIAL WASTE CART & LOCK RATES

SERVICE	RATE	Commercial Service
1 per week	\$30.35	One 90 - Gallon Waste Cart - Curbside
1 per week	\$30.35	One 90 - Gallon Waste Cart - Drive In
per each	\$55.21	Locking Devices; Install, Lock, Key
per each	\$11.04	Locking Devices; Replacement Lock

INDUSTRIAL BIN RATES

SERVICE	RATE	Industrial Bin Rates
PER DUMP	\$265.75	10 Cubic Yard Bin + Per Ton
PER DUMP	\$265.75	20 Cubic Yard Bin + Per Ton
PER DUMP	\$265.75	40 Cubic Yard Bin + Per Ton
PER DUMP	\$332.19	Drop Box with Compactor Per Trip + Per Ton
PER TON	\$54.76	RATE PER TON

The bin rate includes the first 10 days of rent. After 10 days, additional rent will be charged at the rate of \$14.17 per day.

No. of Containers	Size of Container	Service Interval	Monthly Rate
1	4 - yd	1 per week	\$37.65

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EXHIBIT D

EXHIBIT "D"
WOODBIDGE SANITARY DISTRICT
HANDY HAULER RATES
EFFECTIVE 07/01/2021

HANDY HAULER RATES (for temporary cleanups)		
		3.5 Cubic Yard Bin (Price includes the delivery, emptying one time, and the removal of the bin)
\$157.24		Each additional bin with delivery of first bin
		The bin may be kept for up to 10 days or be charged an additional rental charge of \$2.77 per day

Handy Hauler Service is an open topped 3 1/2 cubic yard container for temporary residential clean-ups.

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INCOME IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)

Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.



Label	Estimate	Margin of Error
California		
Households		

▼ Total	13,157,873	±23,844
Less than \$10,000	4.6%	±0.1
\$10,000 to \$14,999	3.7%	±0.1
\$15,000 to \$24,999	6.6%	±0.1
\$25,000 to \$34,999	6.8%	±0.1
\$35,000 to \$49,999	9.9%	±0.1
\$50,000 to \$74,999	15.3%	±0.2
\$75,000 to \$99,999	12.5%	±0.1
\$100,000 to \$149,999	17.4%	±0.2
\$150,000 to \$199,999	9.4%	±0.1
\$200,000 or more	13.7%	±0.1
Median income (dollars)	80,440	±313
Mean income (dollars)	113,563	±505
▼ PERCENT ALLOCATED		
Household income in the past 12 months	37.6%	(X)
Family income in the past 12 months	(X)	(X)
Nonfamily income in the past 12 months	(X)	(X)

Table Notes

INCOME IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED

DOLLARS

Survey/Program: American Community Survey

Year: 2019

Estimates: 2019

1-Year

Table ID: S1901

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Source: U.S. Census Bureau, 2019 American Community Survey 1-Year Estimates

When information is missing or inconsistent, the Census Bureau logically assigns an acceptable value using the process called allocation, which uses a similar individual or household to provide a donor value. The "Allocated" section is the number of respondents who received an allocated value for a particular subject.

Between 2018 and 2019 the American Community Survey retirement income question changed. These changes resulted in an increase in both the number of households reporting retirement income and higher aggregate retirement income at the national level. For more information see Changes to the Retirement Income Question.

The categories for relationship to householder were revised in 2019. For more information see Revisions to the Relationship to Household item.

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

The 2019 American Community Survey (ACS) data generally reflect the September 2018 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineations due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2010 data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

An "*" entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.

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An "-" entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution, or the margin of error associated with a median was larger than the median itself.

An "-" following a median estimate means the median falls in the lowest interval of an open-ended distribution. An "+" following a median estimate means the median falls in the upper interval of an open-ended distribution. An "xxx" entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.

An "xxxxx" entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

An "N" entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.

An "(X)" means that the estimate is not applicable or not available.

Supporting documentation on code lists, subject definitions, data accuracy, and statistical testing can be found on the American Community Survey website in the Technical Documentation section.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the Methodology section.

INCOME IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)



Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

United States	Households	Label	Estimate	Margin of Error
---------------	------------	-------	----------	-----------------

▼ Total			122,802,852	±137,327
Less than \$10,000			5.8%	±0.1
\$10,000 to \$14,999			4.0%	±0.1
\$15,000 to \$24,999			8.3%	±0.1
\$25,000 to \$34,999			8.4%	±0.1
\$35,000 to \$49,999			11.9%	±0.1
\$50,000 to \$74,999			17.4%	±0.1
\$75,000 to \$99,999			12.8%	±0.1
\$100,000 to \$149,999			15.7%	±0.1
\$150,000 to \$199,999			7.2%	±0.1
\$200,000 or more			8.5%	±0.1
Median income (dollars)			65,712	±118
Mean income (dollars)			92,324	±166
▼ PERCENT ALLOCATED				
Household income in the past 12 months			35.8%	(X)
Family income in the past 12 months			(X)	(X)
Nonfamily income in the past 12 months			(X)	(X)

Table Notes

INCOME IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED

DOLLARS)

Survey/Program:

American Community Survey

Year:

2019

Estimates:

1-Year

Table ID:

S1901

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Source: U.S. Census Bureau, 2019 American Community Survey 1-Year Estimates

When information is missing or inconsistent, the Census Bureau logically assigns an acceptable value using the response to a related question or questions. If a logical assignment is not possible, data are filled using a statistical process called allocation, which uses a similar individual or household to provide a donor value. The "Allocated" section is the number of respondents who received an allocated value for a particular subject.

Between 2018 and 2019 the American Community Survey retirement income question changed. These changes resulted in an increase in both the number of households reporting retirement income and higher aggregate retirement income at the national level. For more information see Changes to the Retirement Income Question .

The categories for relationship to householder were revised in 2019. For more information see Revisions to the Relationship to Household item.

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

The 2019 American Community Survey (ACS) data generally reflect the September 2018 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineations due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2010 data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

An "*" entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.

DRAFT

Supporting documentation on code lists, subject definitions, data accuracy, and statistical testing can be found on the American Community Survey website in the Technical Documentation section.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the Methodology section.

An "-" entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution, or the margin of error associated with a median was larger than the median itself.

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An "*" entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

An "N" entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.

An "(X)" means that the estimate is not applicable or not available.



Population Trends Report

PVT Woodbridge Sanitary District
Area: 0.66 square miles

Prepared by Esri

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Average	Median
Population													
Total	3,283	3,279	3,298	3,335	3,369	3,389	3,421	3,464	3,501	3,499	3,465	3,391	3,389
Change	-	-4	19	37	34	20	32	43	37	-2	-34	18	26
Percent Change	-	-0.1%	0.6%	1.1%	1.0%	0.6%	0.9%	1.3%	1.1%	-0.1%	-1.0%	0.5%	0.8%
Annual Rate	-	-0.1%	0.2%	0.5%	0.6%	0.6%	0.7%	0.8%	0.8%	0.7%	0.5%	0.5%	0.6%
Households													
Total	1,126	1,124	1,131	1,143	1,155	1,162	1,172	1,186	1,199	1,198	1,186	1,162	1,162
Change	-	-2	7	12	12	7	10	14	13	-1	-12	6	9
Percent Change	-	-0.2%	0.6%	1.1%	1.0%	0.6%	0.9%	1.2%	1.1%	-0.1%	-1.0%	0.5%	0.8%
Annual Rate	-	-0.2%	0.2%	0.5%	0.6%	0.6%	0.7%	0.7%	0.8%	0.7%	0.5%	0.5%	0.6%
Housing Units													
Total	1,168	1,165	1,168	1,180	1,190	1,197	1,205	1,218	1,230	1,227	1,214	1,197	1,197
Change	-	-3	3	12	10	7	8	13	12	-3	-13	5	8
Percent Change	-	-0.3%	0.3%	1.0%	0.8%	0.6%	0.7%	1.1%	1.0%	-0.2%	-1.1%	0.4%	0.6%
Annual Rate	-	-0.3%	0.0%	0.3%	0.5%	0.5%	0.5%	0.6%	0.6%	0.5%	0.4%	0.4%	0.5%

Data Note: The Esri Vintage 2020 Time Series (2010 thru 2020) represents July 1 annual estimates in 2020 geography. With each annual release, the entire Time Series is revised.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025.

DRAFT

Source:

Household Income Profile



PVT Woodbridge Sanitary District
Area: 0.66 square miles

Prepared by Esri

Summary		2020	2025
Population		3,465	3,596
Households		1,186	1,226
Median Age		40.2	41.2
Average Household Size		2.91	2.92
Annual Rate Change 2020-2025			0.01
2020-2025			0.07%

Households by Income		2020	2025
Household		1,186	1,226
<\$15,000		56	50
\$15,000-\$24,999		80	67
\$25,000-\$34,999		65	56
\$35,000-\$49,999		121	104
\$50,000-\$74,999		180	168
\$75,000-\$99,999		206	209
\$100,000-\$149,999		219	247
\$150,000-\$199,999		102	128
\$200,000+		157	198
Household		100%	100%
Percent		4.7%	4.1%
Number		56	50
Percent		6.7%	5.5%
Number		65	56
Percent		5.5%	4.6%
Number		121	104
Percent		10.2%	8.5%
Number		180	168
Percent		15.2%	13.7%
Number		206	209
Percent		17.4%	17.0%
Number		219	247
Percent		18.5%	20.1%
Number		102	128
Percent		8.6%	10.4%
Number		157	198
Percent		13.2%	16.2%
Household Income		\$84,108	\$93,877
Average Household Income		\$115,502	\$133,020
Per Capita Income		\$40,704	\$46,687

Data Note: Income is reported for households as of July 1, 2020 and represents annual income for the preceding year, expressed in 2019 dollars. Income is reported for households as of July 1, 2025 and represents annual income for the preceding year, expressed in 2024 dollars

Source: U.S. Census Bureau, Census 2010 Summary File 1, Esri Forecasts for 2020 and 2025.

Household Income Profile



PVT Woodbridge Sanitary District
Area: 0.66 square miles

Prepared by Esri

2020 Households by Income and Age of Householder

Income Category	<25	25-34	35-44	45-54	55-64	65-74	75+
Median HH Income	\$56,362	\$76,001	\$87,117	\$98,440	\$92,680	\$83,221	\$60,434
Average HH Income	\$76,793	\$92,586	\$120,024	\$123,418	\$121,469	\$118,480	\$114,897
Percent Distribution							
<\$15,000	1	5	8	6	16	9	11
\$15,000-\$24,999	1	7	11	9	15	18	19
\$25,000-\$34,999	2	13	8	5	10	16	10
\$35,000-\$49,999	4	23	20	13	19	24	18
\$50,000-\$74,999	3	30	22	24	34	39	29
\$75,000-\$99,999	3	34	31	32	52	41	14
\$100,000-\$149,999	2	30	31	44	57	39	14
\$150,000-\$199,999	1	8	17	19	28	25	4
\$200,000+	1	10	25	23	37	34	27
HH Income Base	18	162	173	175	268	245	145
HH Income Base	100%	100%	100%	100%	100%	100%	100%
<\$15,000	5.6%	3.1%	4.6%	3.4%	6.0%	3.7%	7.6%
\$15,000-\$24,999	5.6%	4.3%	6.4%	5.1%	5.6%	7.3%	13.1%
\$25,000-\$34,999	11.1%	8.0%	4.6%	2.9%	3.7%	6.5%	6.9%
\$35,000-\$49,999	22.2%	14.2%	11.6%	7.4%	7.1%	9.8%	12.4%
\$50,000-\$74,999	16.7%	18.5%	12.7%	13.7%	12.7%	15.9%	20.0%
\$75,000-\$99,999	16.7%	21.0%	17.9%	18.3%	19.4%	16.7%	9.7%
\$100,000-\$149,999	11.1%	18.5%	17.9%	25.1%	21.3%	15.9%	9.7%
\$150,000-\$199,999	5.6%	4.9%	9.8%	10.9%	10.4%	10.2%	2.8%
\$200,000+	5.6%	6.2%	14.5%	13.1%	13.8%	13.9%	18.6%

Data Note: Income is reported for households as of July 1, 2020 and represents annual income for the preceding year, expressed in 2019 dollars. Income is reported for households as of July 1, 2025 and represents annual income for the preceding year, expressed in 2024 dollars
Source: U.S. Census Bureau, Census 2010 Summary File 1, Esri Forecasts for 2020 and 2025.

Household Income Profile



2025 Households by Income and Age of Householder

Income Category	<25	25-34	35-44	45-54	55-64	65-74	75+
HH Income Base	17	146	217	165	226	264	192
<\$15,000	1	4	8	5	11	8	13
\$15,000-\$24,999	1	5	10	6	9	15	21
\$25,000-\$34,999	2	10	8	4	7	13	12
\$35,000-\$49,999	3	18	20	8	12	21	22
\$50,000-\$74,999	3	25	24	17	24	38	36
\$75,000-\$99,999	3	31	38	29	43	45	20
\$100,000-\$149,999	2	32	44	46	52	48	22
\$150,000-\$199,999	1	11	26	22	30	33	6
\$200,000+	1	11	39	28	36	44	40
Median HH Income	\$60,146	\$82,242	\$100,361	\$109,878	\$103,709	\$94,694	\$67,668
Average HH Income	\$81,628	\$104,265	\$139,680	\$145,061	\$138,409	\$136,301	\$130,010
Percent Distribution							
Income Category	<25	25-34	35-44	45-54	55-64	65-74	75+
HH Income Base	100%	100%	100%	100%	100%	100%	100%
<\$15,000	5.9%	2.7%	3.7%	3.0%	4.9%	3.0%	6.8%
\$15,000-\$24,999	5.9%	3.4%	4.6%	3.6%	4.0%	5.7%	10.9%
\$25,000-\$34,999	11.8%	6.8%	3.7%	2.4%	3.1%	4.9%	6.2%
\$35,000-\$49,999	17.6%	12.3%	9.2%	4.8%	5.3%	8.0%	11.5%
\$50,000-\$74,999	17.6%	17.1%	11.1%	10.3%	10.6%	14.4%	18.8%
\$75,000-\$99,999	17.6%	21.2%	17.5%	17.6%	19.0%	17.0%	10.4%
\$100,000-\$149,999	11.8%	21.9%	20.3%	27.9%	23.0%	18.2%	11.5%
\$150,000-\$199,999	5.9%	7.5%	12.0%	13.3%	13.3%	12.5%	3.1%
\$200,000+	5.9%	7.5%	18.0%	17.0%	15.9%	16.7%	20.8%

Data Note: Income is reported for households as of July 1, 2020 and represents annual income for the preceding year, expressed in 2019 dollars. Income is reported for households as of July 1, 2025 and represents annual income for the preceding year, expressed in 2024 dollars

Source: U.S. Census Bureau, Census 2010 Summary File 1, Esri Forecasts for 2020 and 2025.

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Wastewater Generation and Treatment Capacity Evaluation

Appendix D

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CURRENT FLOW CONDITIONS			CURRENT WASTEWATER CHARACTERISTICS			
Current Average Dry Weather Flow (ADWF)	0.26	Mgal/day	Avg Influent BOD ₅	478	lb/d	
Service Population (total capita)	3484		Avg Influent SS	363	lb/d	
Occupied Residential Connections	1244		Avg Influent BOD ₅	0.14	lb/cap/d	
Flow per capita	75	gall/person/d	Avg Influent SS	0.10	lb/cap/d	
Occupancy/residential connection (Existing & Rivermist)	2.8					
ADDITIONAL LOADS						
Within WSD	Parcels	Population	Flow (gall/d)	BOD₅ (lb / d)	SS (lb / d)	
Connected (Unoccupied (C, U))	39	109	8102	14.9	4.0	
Not Connected, w/in WSD (NC, W/in)	80	224	16717	30.7	8.3	
Outside of WSD	EDUs	Population	Flow (gall/d)	BOD ₅ (lb / d)	SS (lb / d)	
Rivermist Development	27	76	5642	10.4	7.9	
TOTAL PROJECTED LOADS						
Within WSD	Parcels	Population	Flow (Mgal/d)	BOD₅ (lb/d)	SS (lb / d)	
(1) Current + C, U	1283	3593	0.268	493	367	
(2) Current + C, U + Not Connected, w/in WSD	1363	3708	0.285	524	375	
Within & Outside of WSD	EDUs	Population	Flow (Mgal/d)	BOD₅ (lb/d)	SS (lb / d)	
(3) All projected loads w/in district + Rivermist Development (27 RU)	1390	3992	0.290	534	383	

Year	ADWF (gall)	WW Gen (GPCD)
2017	248,768	72
2018	269,626	77
2019	263,193	75
2020	252,963	73
2021	236,308	68
5-Year Avg.	254,600	73
5-Year Conservative Avg.	0.26	75

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Woodbridge Sanitary District - Approved Budget for 2021-22

Revenue	FUND	SOURCE	2020-21 Approved Budget	2020-21 Actuals July-May	2020-21 Est. Actuals June	2020-21 Revised Budget	2021-22 Approved Budget
45101	DIRECT ASSESSMENTS		612,117	608,714	0	608,714	680,127
45101	SOLID WASTE FRANCHISE FEE		9,491	11,207	0	11,207	9,586
45112	PROPERTY TAX		54,507	56,192	0	56,192	55,597
45101	INTE REST		5,000	4,069	475	4,544	4,500
45-112/160/165	INTE REST		3,419	1,673	200	1,873	1,900
45-101/112/165	TRANSFER IN FROM RESTRICTED FUNDS		43,115	0	0	0	115,597
TOTAL INCOME							
			\$ 727,649	\$ 681,855	\$ 675	\$ 682,530	\$ 867,307
EXPENSES							
6001000000	SALARIES		170,000	160,786	13,000	173,786	185,100
6003000000	OVERTIME		4,000	3,333	300	3,633	4,100
6003200000	SALARIES-HOLIDAY/ON CALL		0	3,836	600	4,436	7,300
6030000000	FICA - OASDI		10,790	10,413	873	11,286	12,183
6030100000	MEDICARE		2,530	2,435	204	2,639	2,849
6010100000	EDD - UNEM		6,650	7,042	0	7,042	7,200
6010200000	EDD - TR TAX		200	190	0	190	200
6110899000	CUSTOMER REFUNDS		0	0	0	0	0
6240000000	CLOTHING & PERS		250	0	0	0	257
6201000000	OFFICE		5,000	3,641	400	4,041	5,150
6214000500	LEASED SERVICES		2,000	1,336	119	1,455	2,200
6202000000	POSTAGE		200	0	0	0	0
6203000000	SUBS & PERIODICALS		0	0	0	0	0
6206000000	UTILITIES - PHONES		7,600	14,163	1,450	15,613	16,000
6249000000	UTILITIES / SIC Water		85,000	73,243	6,200	79,443	80,000
6209000000	MEMBERSHIPS: CSDA/CRWA/CEWA		2,240	347	0	347	3,120
6217000000	GAS-TRANS-REPAIR-TRAINING		3,500	2,317	260	2,577	3,605
6223000000	PUB & LEGAL NOTICES		200	1,480	0	1,480	400
6226008600	PERMITS & FEES		25,000	23,210	0	23,210	25,000
6221030100	AUDITOR - SGLA		6,200	0	6,200	6,200	9,500
6220001000	SJC - AP CHARGES		3,020	0	3,020	3,020	3,610
6220009500	AUDITOR SERVICE CHRG		4,000	3,954	0	3,954	4,120
6221000000	PROFESSIONAL SERVICES/Stantec		12,000	11,909	2,900	14,809	22,400
6221001400	ENGINEERING - KSN		50,000	17,624	3,000	20,624	33,500
6221004100	WATER ANALYSIS - FGL		40,000	44,363	5,541	49,904	41,000
6221005100	ATTORNEY - D. Ruiz		30,000	36,318	3,000	39,318	32,500
6221014700	CONTRACT OPERATOR		3,000	1,725	0	1,725	3,090
6260005200	REPAIR & MAINT. PLANT SITE		25,000	35,011	2,000	37,011	35,000
6260005300	REPAIR & MAINT. COLLECTION		35,000	26,816	4,947	31,763	36,000
6269000000	SMALL TOOLS < \$1000 >>		500	193	0	193	515
6451000000	EQUIPMENT		1,000	0	0	0	1,030
6451004200	CAPITAL EQUIPMENT > \$500		500	0	0	0	515
6264000000	NORMAN/Lease & Taxes		1,100	1,047	0	1,047	1,131
6232000100	INSURANCE - Work Comp		20,000	19,663	0	19,663	6,000

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EXPENSES	2020-21 Approved Budget	2020-21 Actuals July-May	2020-21 Est. Actuals June	2020-21 Revised Budget	2021-22 Approved Budget
INSURANCE - Lib-Prop-Crime/Flood	22,000	22,853	0	22,853	17,300
TAX ADMIN/ELECTION	8,000	844	0	844	1,000
TAXES & ASSESSMENTS	700	0	0	0	721
MISC	4,500	6,278	400	6,678	6,000
USD/LOAN - P&I/DSR	34,265	0	0	0	68,530
INTEREST - EXPENSE	0	0	0	0	0
SHORT-LIVED ASSETS/DEPRECIATION	100,000		50,000	50,000	100,000
TOTAL	725,945	536,370	104,414	640,784	778,126
				Net	41,746
					5/31/2021 FUN 01 BAL = \$645,109.07
					89,181

FUND BAL = 01	\$645,109.00
FUND BAL = 12	\$172,850.00
FUND BAL = 60	\$6,566.00
FUND BAL = 65	\$93,118.00
FUND BAL = 90	\$6,399.00
TOTAL	\$924,042.00

SUMMARY OF ALL ACTS
5/31/21

Operating	\$ 406,400	8 months	\$ 406,400
Capital	\$ -		
Total	\$ 406,400		

Recommended Reserves: 2021-22
\$50,800 @

5/31/2021 FUND 65 BAL = \$93,118.26					
FUND 45165					
2020-21	2020-21	2020-21	2020-21	2020-21	2021-22
Approved Budget	Revised Budget	Est. Actuals June	Actuals July-May	Actuals June	Approved Budget
\$ 9,300	\$ -	\$ 199	\$ 597	\$ 796	\$ 700
\$ 11,207	\$ 11,207				\$ 9,586
TOTAL INCOME					
INTEREST					
\$ 1,000	\$ -	\$ -	\$ 597	\$ 796	\$ 700

5/31/2021 FUND 60 BAL = \$6,566.00					
FUND 45160					
2020-21	2020-21	2020-21	2020-21	2020-21	2021-22
Approved Budget	Revised Budget	Est. Actuals June	Actuals July-May	Actuals June	Approved Budget
\$ 30.00	\$ -	\$ 6	\$ 47	\$ 53	\$ 40
\$ 30.00	\$ -	\$ -	\$ 47	\$ 53	\$ 40
TOTAL INCOME - INTEREST					
SURETY BOND \$6000					

5/31/2021 FUND 12 BAL = \$172,849.63					
FUND 45112					
2020-21	2020-21	2020-21	2020-21	2020-21	2021-22
Approved Budget	Revised Budget	Est. Actuals June	Actuals July-May	Actuals June	Approved Budget
\$ 48,000	\$ -	\$ 142	\$ 944	\$ 1,086	\$ 1,000
\$ 56,192	\$ 56,192	\$ -	\$ 3,500	\$ 3,500	\$ 55,597
TOTAL INCOME 45112					
INTEREST					
\$ -	\$ -	\$ -	\$ 944	\$ 1,086	\$ 1,000
OVERAGE ACT. 45101					
\$ 83,174	\$ 58,492	\$ 58,492	\$ -	\$ 58,492	\$ 89,181
EXPEND ACT. 45 112					
\$ 16,400	\$ 3,500	\$ -	\$ 3,500	\$ 3,500	\$ 112,752
EXPENSES					
Engineering					
\$ 4,762	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
New Structures/Jennings					
\$ -	\$ 3,500	\$ 0	\$ 3,500	\$ 3,500	\$ 0
System Improvements					
\$ 11,638	\$ 0	\$ 0	\$ 0	\$ 0	\$ 112,752
Equipment					
\$ -	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
TOTAL EXPENSES					
\$ 16,400	\$ 3,500	\$ -	\$ 3,500	\$ 3,500	\$ 112,752