



**SPMUD BOARD OF DIRECTORS
REGULAR MEETING: 4:30 PM
January 4, 2024**

SPMUD Boardroom
5807 Springview Drive, Rocklin, CA 95677

Zoom Meeting: 1 (669) 900-9128
Meeting ID: 882 7964 9201

The District’s regular Board meeting is held on the first Thursday of every month. This notice and agenda are posted on the District’s website (www.spmud.ca.gov) and the District’s outdoor bulletin board at 5807 Springview Drive Rocklin, CA. Meeting facilities are accessible to persons with disabilities. Requests for other considerations should be made at (916) 786-8555.

The January 4, 2024 meeting of the SPMUD Board of Directors will be held in the District Board Room at 5807 Springview Drive in Rocklin, CA 95677 with the option for the public to join via teleconference using Zoom Meeting 1 (669) 900-9128, <https://us02web.zoom.us/j/88279649201>. Public comments can be made in person at the time of the meeting or emailed to ecostan@spmud.ca.gov from the time the agenda is posted until the matter is heard at the meeting. Comments should be kept to 250 words or less.

AGENDA

I. CALL MEETING TO ORDER

II. ROLL CALL OF DIRECTORS

Director Gerald Mitchell	Ward 1
Director William Dickinson	Ward 2
Director Christy Jewell	Ward 3
Vice President James Durfee	Ward 4
President James Williams	Ward 5

III. PLEDGE OF ALLEGIANCE

IV. PUBLIC COMMENTS

Items not on the Agenda may be presented to the Board at this time; however, the Board can take no action. Public comments can be made in person at the time of the meeting or emailed to ecostan@spmud.ca.gov from the time the agenda is posted until the matter is heard at the meeting. Comments should be kept to 250 words or less.

V. SELECTION OF OFFICERS AND APPOINTMENTS TO THE TEMPORARY ADVISORY COMMITTEES AND SPWA BOARD

[pg 4]

Selection of Officers for the 2024 calendar year and appointment to various temporary advisory committees and a District representative to SPWA.

Action Requested: (Voice Vote)

1. **The current President, James Williams, dissolve the existing Advisory Committees;**
2. **The current Vice-President, James Durfee, succeed as the new President for 2024;**
3. **The Board of Directors consider nominations for a new Vice-President, entertain a motion for a nominee, and vote on said motion; and**
4. **The President creates and make appointments to any new temporary Advisory Committees; and**
5. **The President appoints a District representative to the South Placer Wastewater Authority Board of Directors.**

VI. CONSENT ITEMS [pg 5 to 16]

Consent items should be considered together as one motion. Any item(s) requested to be removed will be considered after the motion to approve the Consent Items.

ACTION: (Roll Call Vote)

Motion to approve the consent items for the January 4, 2024 meeting.

1. MINUTES from the December 7, 2023, Regular Meeting. [pg 5 to 7]
2. ACCOUNTS PAYABLE in the amount of \$3,472,016 through December 26, 2023. [pg 8 to 12]
3. RESOLUTION 24-01 NOTICE OF COMPLETION FOR THE SPMUD BUILDING ADDITION AND TENANT IMPROVEMENTS PROJECT [pg 13 to 16]

VII. BOARD BUSINESS

Board action may occur on any identified agenda item. Any member of the public may directly address the Board on any identified agenda item of interest, either before or during the Board's consideration of that item.

1. SEWER PARTICIPATION CHARGE ANALYSIS [pg 17 to 67]
District staff will present an analysis and regional comparison of the District's Local and Regional Participation fees.

No Action Requested: Informational Item

2. GENERAL MANAGER GOALS FOR 2024 [pg 68 to 70]
The Board has requested that the General Manager present goals for the upcoming year to be reviewed. These items were reviewed by the President's Committee on December 20, 2023, and are being forwarded for the Board's discussion and approval.

Action Requested: (Voice Vote)

Approve the General Manager's Goals for Calendar Year 2024

VIII. REPORTS

[pg 71 to 85]

The purpose of these reports is to provide information on projects, programs, staff actions, and committee meetings that are of general interest to the Board and the public. No decisions are to be made on these issues.

1. Legal Counsel (A. Brown)
2. General Manager (H. Niederberger)
 - 1) ASD, FSD & TSD Reports
 - 2) Informational items
3. Director's Comments: Directors may make brief announcements or brief reports on their activities. They may ask questions for clarification, make a referral to staff, or take action to have staff place a matter of business on a future agenda.

IX. CLOSED SESSION

CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION

(Paragraph 1 of Subdivision (d) of California Government Code Section 54956.9)

Name of Case: Brian Taylor vs. The County of Placer, et al.

United States District Court, Eastern District of California Case No.

2:23-cv-2870-KJM DB PS

X. CLOSED SESSION READOUT

XI. ADJOURNMENT

If there is no other Board business the President will adjourn the meeting to the next regular meeting to be held on **February 1, 2024, at 4:30 p.m.**

**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STAFF REPORT**

To: Board of Directors
From: Herb Niederberger, General Manager
Cc: Emilie Costan, Administrative Services Manager
Subject: **Selection of Officers and Appointments to the Temporary Advisory Committees and SPWA Board**
Meeting Date: January 4, 2024

Overview

Every January, the Board of Directors chooses a President and Vice-President, as well as considers appointments to the temporary Advisory Committees. In accordance with Policy 4055, the Vice President shall become President, and a new Vice-President shall be chosen by a majority vote of the Board of Directors. The three (3) remaining Directors will serve At-Large.

Recommendation

Staff recommends that:

1. The current President, James Williams, dissolve the existing Advisory Committees;
2. The current Vice-President, James Durfee, succeed as the new President for 2024;
3. The Board of Directors consider nominations for a new Vice-President, entertain a motion for a nominee, and vote on said motion;
4. The President creates and make appointments to any new temporary Advisory Committees; and
5. The President appoints a District representative and alternate to the South Placer Wastewater Authority Board of Directors.

Strategic Plan Goals

The annual appointment of the Board President, Vice-President, and Temporary Advisory Committees are not governed by the Strategic Plan.

Related District Ordinances or Policies

Policy 4055- Selection of Officers.

Fiscal Impact

There is no direct fiscal impact associated with these actions.

**REGULAR BOARD MINUTES
SOUTH PLACER MUNICIPAL UTILITY DISTRICT**

Meeting	Location	Date	Time
Regular	SPMUD Boardroom Zoom Meeting	December 7, 2023	4:30 p.m.

I. CALL MEETING TO ORDER: The Regular Meeting of the South Placer Municipal Utility District Board of Directors was called to order with President Williams presiding at 4:29 p.m.

II. ROLL CALL OF DIRECTORS:

Present: Director Jerry Mitchell, Director James Durfee, Director Will Dickinson, Director Jim Williams
Director Christy Jewell arrived at 4:31 p.m.

Absent: None

Vacant: None

Staff: Adam Brown, Legal Counsel
Herb Niederberger, General Manager
Carie Huff, District Engineer
Eric Nielsen, Superintendent
Emilie Costan, Administrative Services Manager

III. PLEDGE OF ALLEGIANCE: Director Dickinson led the Pledge of Allegiance.

IV. PUBLIC COMMENTS:

ASM Costan confirmed that no eComments were received. Hearing no other comments, the public comments session was closed.

V. CONSENT ITEMS:

1. MINUTES from the November 2, 2023, Regular Meeting.
2. ACCOUNTS PAYABLE in the amount of \$603,268 through November 27, 2023.
3. ACCEPTANCE OF THE PARTICIPATION CHARGE REPORT FOR FISCAL YEAR 2022/23.

Director Mitchell made a motion to approve the consent items; a second was made by Vice President Durfee; a roll call vote was taken, and the motion carried 5-0.

VI. BOARD BUSINESS

1. FISCAL YEAR 2022/23 AUDIT REPORT ACCEPTANCE

Erica Pastor, Partner with Mann, Urrutia, and Nelson CPAs & Associates presented the results of the Fiscal Year 2022/23 Annual Financial Audit. Ms. Pastor shared that this year’s audit found that the District maintained proper internal controls. The District received an Unmodified or “clean” Audit Opinion. There were no compliance exceptions, no material weaknesses, and no significant

deficiencies. The audit resulted in three audit adjustments and one management letter comment related to the reconciliation of unapplied credits for two educational customers. Director Dickinson asked for the dollar amount of the unapplied credits, and Ms. Pastor shared that the adjustment for prior years was \$378,334 and the adjustment for the current year was \$81,415. Director Dickinson asked if all of the revenue from the unapplied credits is being recognized in the current year, and Ms. Pastor shared that current revenues are reported in the current year and the other revenues are posted as an adjustment to prior years. GM Niederberger added that the two educational customers are on legacy contract billing. He shared that he plans to address the billing of these accounts going forward and will place the item on his list of 2024 goals.

Ms. Pastor thanked the ASM and her team for their organization and thoroughness during the audit. The Board President thanked Ms. Pastor for her firm's work in auditing the District and preparing the financial statements.

Director Dickinson made a motion to receive and file the Fiscal Year 2022/23 Audit Report; a second was made by Vice President Durfee; a voice vote was taken, and the motion carried 5-0.

2. RESOLUTION 23-40 TREE REMOVAL SERVICES

DS Nielsen presented a proposal to utilize a cooperative agreement to purchase tree removal services from Tree Pro Services. The tree removal would occur in District easements and is needed to properly maintain the District's sewer facilities.

Director Dickinson asked whether staff is expecting complaints from residents. DS Nielsen shared that the first project to be completed is an anticipated project with agreements already in place, and the second project is on a property where the owners are amenable to the work. Moving forward, the District may encounter complaints. The District will notify impacted property owners in advance of any maintenance work occurring. Director Dickinson asked how long it has been since the District has performed tree maintenance, and GM Niederberger commented that in many cases, trees were last cleared at pipe installation. President Williams asked if there is an annual budget line for these services, and GM Niederberger shared that the District has been budgeting for tree removal for the last few years, but the project is only now mature enough to begin work.

Vice President Durfee made a motion to approve Resolution 23-40 authorizing the General Manager to purchase tree removal services through a piggyback procurement through California Multiple Award Schedule (CMAS) Contract 4-09-03-0378A with Tree Pro Services, Inc./Ross Tree Expert Company for the fiscal year 2023/24 with a not-to-exceed amount of \$125,000; a second was made by Director Jewell; a roll call vote was taken, and the motion carried 5-0.

VIII. REPORTS

1. District General Counsel (A. Brown):

General Counsel Brown had no report for this meeting.

2. General Manager (H. Niederberger):

A. ASD, FSD & TSD Reports:

Director Dickinson asked about the Loomis 2x2 meeting. President Williams commented that it was a good opportunity to share information. Director Jewell asked about the frequency of the 2x2 meetings. GM Niederberger shared that the Committee discussed meeting once every six months.

Director Mitchell asked about the College Park Connection Fee Proposal. President Williams shared that the Fee & Finance Committee met with the developer on December 6th to review their proposal. There were some timing issues in their proforma that the District addressed with them. The developer is exploring methods for potentially freezing the connection fee at the time of permit issuance, even though the fee isn't due until the time of connection. There are concerns that freezing the fee before it is due for this project would constitute a gift of public funds. The District is open to reviewing a revised proposal from the developer.

Director Dickinson asked about the rock discovered during potholing at Del Rio and Delmar. DE Huff shared that at the two northernmost pothole locations they were approximately two feet short of the desired depth due to rock. The Design Engineer is submitting specifications for the District to review tomorrow.

Director Dickinson also asked about the environmental and cultural issues with the Johnson-Springview Creek Crossing. GM Niederberger shared that these items cost time and money; however, the larger issue is the flood control requirements that are impacting the design of the bridge. Director Mitchell commented that a bridge connecting the two large regional parks is advantageous for the City of Rocklin and should merit increased funding from the City if needed. This item will be discussed at the upcoming Rocklin 2x2 meeting.

B. Information Items: No additional items.

3. Director's Comments:

Director Jewell shared that she has accepted a new position as Workforce Development & Career Pathways Manager with the League of CA Cities.

VIII. CLOSED SESSION READOUT

The Board met in Closed Session at 5:03 p.m. to complete the General Manager's performance evaluation. The Board adjourned the closed session at 5:30 p.m.

Action Taken: The Board awarded the General Manager a contribution equal to 5% of his annual salary to his 401(a) Supplemental Retirement account.

IX. ADJOURNMENT

The President adjourned the meeting at 5:35 p.m. to the next regular meeting to be held on January 4, 2024, at 4:30 p.m.



Emilie Costan, Board Secretary



South Placer M.U.D.

Check Report

By Check Number

Date Range: 11/28/2023 - 12/26/2023

Vendor Number	Vendor Name	Payment Date	Payment Type	Discount Amount	Payment Amount	Number
Bank Code: AP Bank-AP Bank						
1240	Placer County Personnel	11/28/2023	Regular	0.00	3,403.67	16619
1007	Advanced Integrated Pest	11/29/2023	Regular	0.00	116.00	16640
1742	Burrell Consulting Group	11/29/2023	Regular	0.00	3,555.00	16641
1828	Carollo Engineers, Inc	11/29/2023	Regular	0.00	3,965.25	16642
1853	Cartwright Nor Cal Inc.	11/29/2023	Regular	0.00	3,788.75	16643
1652	Cintas Corporation	11/29/2023	Regular	0.00	1,092.55	16644
1852	Coastland Civil Engineering LLP	11/29/2023	Regular	0.00	3,706.25	16645
1124	Gold Country Media Publications	11/29/2023	Regular	0.00	78.00	16646
1564	Jensen Landscape Services, LLC	11/29/2023	Regular	0.00	978.00	16647
1163	Joe Gonzalez Trucking, LLC.	11/29/2023	Regular	0.00	2,503.06	16648
1785	Landmark Construction	11/29/2023	Regular	0.00	137,176.25	16649
1599	MUN CPA's	11/29/2023	Regular	0.00	15,500.00	16650
1764	Network Design Associates, Inc.	11/29/2023	Regular	0.00	944.00	16651
1793	NEXGEN Asset Management, Inc.	11/29/2023	Regular	0.00	11,180.00	16652
1244	Preferred Alliance Inc	11/29/2023	Regular	0.00	196.56	16653
1797	Red Dog Shredz	11/29/2023	Regular	0.00	519.00	16654
1518	Sonitrol of Sacramento	11/29/2023	Regular	0.00	1,345.21	16655
1652	Cintas Corporation	12/07/2023	Regular	0.00	567.94	16656
1068	City of Roseville	12/07/2023	Regular	0.00	185,611.68	16657
1775	CPS HR Consulting	12/07/2023	Regular	0.00	678.75	16658
1509	Crystal Communications	12/07/2023	Regular	0.00	311.64	16659
1086	Dataprose	12/07/2023	Regular	0.00	8,872.13	16660
1087	Dawson Oil Co.	12/07/2023	Regular	0.00	6,387.13	16661
1687	Duke's Root Control, Inc	12/07/2023	Regular	0.00	9,545.25	16662
1865	Forklift Services	12/07/2023	Regular	0.00	649.95	16663
1599	MUN CPA's	12/07/2023	Regular	0.00	8,000.00	16664
1762	PAC Machine Company	12/07/2023	Regular	0.00	6,954.52	16665
1218	PCWA	12/07/2023	Regular	0.00	1,319.27	16666
1221	PG&E	12/07/2023	Regular	0.00	1,454.99	16667
1253	Recology Auburn Placer	12/07/2023	Regular	0.00	386.11	16668
1303	State Water Resources Control Board	12/07/2023	Regular	0.00	20,085.00	16669
1685	Streamline	12/07/2023	Regular	0.00	497.00	16670
1330	United Rentals Northwest	12/07/2023	Regular	0.00	4,282.73	16671
1850	WYJO Services Corp	12/07/2023	Regular	0.00	4,033.57	16672
1327	US Bank Corporate Payment	12/13/2023	Regular	0.00	25,253.77	16673
	Void	12/13/2023	Regular	0.00	0.00	16674
	Void	12/13/2023	Regular	0.00	0.00	16675
	Void	12/13/2023	Regular	0.00	0.00	16676
	Void	12/13/2023	Regular	0.00	0.00	16677
	Void	12/13/2023	Regular	0.00	0.00	16678
	Void	12/13/2023	Regular	0.00	0.00	16679
	Void	12/13/2023	Regular	0.00	0.00	16680
1561	19six Architects	12/14/2023	Regular	0.00	1,743.75	16681
1021	ARC	12/14/2023	Regular	0.00	110.49	16682
248	AT&T	12/14/2023	Regular	0.00	8.82	16683
1022	AT&T CalNet	12/14/2023	Regular	0.00	562.60	16684
1768	Capital Program Management Inc.	12/14/2023	Regular	0.00	6,183.25	16685
1861	Capitol Valley Electric	12/14/2023	Regular	0.00	12,960.00	16686
1652	Cintas Corporation	12/14/2023	Regular	0.00	531.90	16687
1864	Flo-Line Technology, Inc	12/14/2023	Regular	0.00	22,481.12	16688
1666	Great America Financial Services	12/14/2023	Regular	0.00	686.82	16689
1139	Hill Rivkins Brown & Associates	12/14/2023	Regular	0.00	8,280.00	16690
1764	Network Design Associates, Inc.	12/14/2023	Regular	0.00	450.00	16691
1218	PCWA	12/14/2023	Regular	0.00	981.86	16692

Check Report

Date Range: 11/28/2023 - 12/26/2023

Vendor Number	Vendor Name	Payment Date	Payment Type	Discount Amount	Payment Amount	Number
1221	PG&E	12/14/2023	Regular	0.00	5,298.38	16693
1473	Pitney Bowes Purchase Power	12/14/2023	Regular	0.00	820.99	16694
1244	Preferred Alliance Inc	12/14/2023	Regular	0.00	196.56	16695
1518	Sonitrol of Sacramento	12/14/2023	Regular	0.00	235.71	16696
1333	SPOK, Inc.	12/14/2023	Regular	0.00	29.49	16697
1698	SwiftComply US Opco, Inc	12/14/2023	Regular	0.00	6,135.00	16698
1338	Verizon Wireless	12/14/2023	Regular	0.00	1,197.26	16699
1343	Water Works Engineers, LLC	12/14/2023	Regular	0.00	69,632.29	16700
1850	WYJO Services Corp	12/14/2023	Regular	0.00	762.76	16701
1828	Carollo Engineers, Inc	12/20/2023	Regular	0.00	23,026.95	16703
1652	Cintas Corporation	12/20/2023	Regular	0.00	531.90	16704
1068	City of Roseville	12/20/2023	Regular	0.00	2,606,750.00	16705
1852	Coastland Civil Engineering LLP	12/20/2023	Regular	0.00	3,136.25	16706
1073	Consolidated Communications	12/20/2023	Regular	0.00	2,131.60	16707
1218	PCWA	12/20/2023	Regular	0.00	581.53	16708
1839	Ralph Andersen & Associates	12/20/2023	Regular	0.00	2,400.00	16709
1253	Recology Auburn Placer	12/20/2023	Regular	0.00	386.11	16710
1518	Sonitrol of Sacramento	12/20/2023	Regular	0.00	1,345.21	16711
1848	Ubora Engineering & Planning	12/20/2023	Regular	0.00	9,375.00	16712
1240	Placer County Personnel	12/22/2023	Regular	0.00	3,465.67	16728
1015	American Fidelity Assurance	12/01/2023	Bank Draft	0.00	420.16	DFT0008691
1230	Pers (EFT)	12/01/2023	Bank Draft	0.00	6,787.18	DFT0008692
1230	Pers (EFT)	12/01/2023	Bank Draft	0.00	37,828.76	DFT0008693
1230	Pers (EFT)	12/01/2023	Bank Draft	0.00	9,076.12	DFT0008694
1230	Pers (EFT)	12/01/2023	Bank Draft	0.00	171.81	DFT0008695
1230	Pers (EFT)	12/01/2023	Bank Draft	0.00	3,926.00	DFT0008696
1230	Pers (EFT)	12/01/2023	Bank Draft	0.00	102.20	DFT0008697
1586	Principal Life Insurance Company	12/01/2023	Bank Draft	0.00	308.97	DFT0008698
1015	American Fidelity Assurance	11/30/2023	Bank Draft	0.00	27,336.98	DFT0008699
1045	Cal Pers 457 Plan (EFT)	12/08/2023	Bank Draft	0.00	775.00	DFT0008700
1135	Empower (EFT)	12/08/2023	Bank Draft	0.00	260.00	DFT0008701
1135	Empower (EFT)	12/08/2023	Bank Draft	0.00	8,581.00	DFT0008702
1135	Empower (EFT)	12/08/2023	Bank Draft	0.00	756.83	DFT0008703
1042	CA State Disbursement (EF	12/08/2023	Bank Draft	0.00	870.00	DFT0008704
1015	American Fidelity Assurance	12/08/2023	Bank Draft	0.00	351.64	DFT0008705
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	49.13	DFT0008706
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	990.73	DFT0008707
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	1,975.26	DFT0008708
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	2,103.58	DFT0008709
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	3,558.07	DFT0008710
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	4,394.79	DFT0008711
1229	Pers (EFT)	12/08/2023	Bank Draft	0.00	4,355.10	DFT0008712
1149	Internal Revenue Service	12/08/2023	Bank Draft	0.00	10,804.78	DFT0008713
1098	EDD (EFT)	12/08/2023	Bank Draft	0.00	4,243.69	DFT0008714
1098	EDD (EFT)	12/08/2023	Bank Draft	0.00	774.50	DFT0008715
1149	Internal Revenue Service	12/08/2023	Bank Draft	0.00	3,278.64	DFT0008716
1149	Internal Revenue Service	12/08/2023	Bank Draft	0.00	9,706.38	DFT0008717
1045	Cal Pers 457 Plan (EFT)	12/22/2023	Bank Draft	0.00	775.00	DFT0008721
1135	Empower (EFT)	12/22/2023	Bank Draft	0.00	260.00	DFT0008722
1135	Empower (EFT)	12/22/2023	Bank Draft	0.00	8,581.00	DFT0008723
1135	Empower (EFT)	12/22/2023	Bank Draft	0.00	756.83	DFT0008724
1042	CA State Disbursement (EF	12/22/2023	Bank Draft	0.00	870.00	DFT0008725
1015	American Fidelity Assurance	12/22/2023	Bank Draft	0.00	351.64	DFT0008726
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	49.13	DFT0008727
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	990.73	DFT0008728
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	1,975.26	DFT0008729
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	2,103.58	DFT0008730
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	3,558.07	DFT0008731
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	4,941.44	DFT0008732
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	4,546.50	DFT0008733
1149	Internal Revenue Service	12/22/2023	Bank Draft	0.00	10,522.36	DFT0008734

Check Report

Date Range: 11/28/2023 - 12/26/2023

Vendor Number	Vendor Name	Payment Date	Payment Type	Discount Amount	Payment Amount	Number
1098	EDD (EFT)	12/22/2023	Bank Draft	0.00	3,911.31	DFT0008735
1098	EDD (EFT)	12/22/2023	Bank Draft	0.00	717.31	DFT0008736
1149	Internal Revenue Service	12/22/2023	Bank Draft	0.00	3,477.03	DFT0008737
1149	Internal Revenue Service	12/22/2023	Bank Draft	0.00	9,708.24	DFT0008738
1229	Pers (EFT)	12/20/2023	Bank Draft	0.00	-535.62	DFT0008741
1229	Pers (EFT)	12/20/2023	Bank Draft	0.00	-180.46	DFT0008742
1098	EDD (EFT)	12/20/2023	Bank Draft	0.00	54.80	DFT0008743
1149	Internal Revenue Service	12/20/2023	Bank Draft	0.00	68.26	DFT0008745
1229	Pers (EFT)	12/22/2023	Bank Draft	0.00	-3,015.12	DFT0008746

Bank Code AP Bank Summary

Payment Type	Payable Count	Payment Count	Discount	Payment
Regular Checks	115	67	0.00	3,267,358.25
Manual Checks	0	0	0.00	0.00
Voided Checks	0	7	0.00	0.00
Bank Drafts	50	50	0.00	198,274.59
EFT's	0	0	0.00	0.00
	165	124	0.00	3,465,632.84

All Bank Codes Check Summary

Payment Type	Payable Count	Payment Count	Discount	Payment
Regular Checks	115	67	0.00	3,267,358.25
Manual Checks	0	0	0.00	0.00
Voided Checks	0	7	0.00	0.00
Bank Drafts	50	50	0.00	198,274.59
EFT's	0	0	0.00	0.00
	165	124	0.00	3,465,632.84

Fund Summary

Fund	Name	Period	Amount
100	GENERAL FUND	11/2023	217,384.53
100	GENERAL FUND	12/2023	3,248,248.31
			3,465,632.84

Account Number	Name	Date	Type	Amount	Reference
102-0002073-01	Pacini, Paul R	11/28/2023	Refund	\$ 113.31	Check #: 16620
102-0003090-01	Smith, Donald R Jr	11/28/2023	Refund	\$ 6.92	Check #: 16621
102-0006064-02	Diaz, Danielle	11/28/2023	Refund	\$ 146.74	Check #: 16622
102-0006111-02	Walker, Jenna	11/28/2023	Refund	\$ 5.66	Check #: 16623
102-0007574-01	Trust, Terry Yoschak	11/28/2023	Refund	\$ 104.76	Check #: 16624
102-0009255-03	Jowza, Regina and Ali	11/28/2023	Refund	\$ 110.75	Check #: 16625
102-0011170-02	Sugie, Kiyotaka and Setsuko	11/28/2023	Refund	\$ 59.41	Check #: 16626
102-0011631-01	Montoya, Thomas	11/28/2023	Refund	\$ 119.44	Check #: 16627
102-0012163-01	Trust, Halvor H Gates Family	11/28/2023	Refund	\$ 6.98	Check #: 16628
106-0016089-01	Bunnell, Robert	11/28/2023	Refund	\$ 22.50	Check #: 16629
106-1025549-02	Ung, Sam	11/28/2023	Refund	\$ 110.95	Check #: 16630
112-1022050-03	Radmand, Adam	11/28/2023	Refund	\$ 28.69	Check #: 16631
112-1024629-02	Genigeorgis, Constantin and Maude	11/28/2023	Refund	\$ 409.59	Check #: 16632
112-1025865-02	Lewis, Kent and Lisa	11/28/2023	Refund	\$ 109.61	Check #: 16633
112-1029138-01	Galvin, Matthew and Kami	11/28/2023	Refund	\$ 7.04	Check #: 16634
112-1029529-01	Javaheri, Monir	11/28/2023	Refund	\$ 493.35	Check #: 16635
112-1030187-00	Toll Brothers	11/28/2023	Refund	\$ 12.50	Check #: 16636
112-1030191-00	The New Home Company	11/28/2023	Refund	\$ 115.98	Check #: 16637
202-0011392-02	Ranch, Lee / Stanford	11/28/2023	Refund	\$ 41.70	Check #: 16638
202-0011658-02	UAIC Golf Resorts Corp	11/28/2023	Refund	\$ 35.41	Check #: 16639
102-0001800-02	Gothold, Christopher and Kirsten	12/18/2023	Refund	\$ 970.68	Check #: 16702
102-0005567-02	Artinian, Kyvele and Ray	12/21/2023	Refund	\$ 112.84	Check #: 16713
103-0016042-03	Larson, Robert	12/21/2023	Refund	\$ 110.88	Check #: 16714
104-0008000-01	Martin, Michael	12/21/2023	Refund	\$ 5.37	Check #: 16715
106-0015822-01	McLaughlin, Robert B Jr	12/21/2023	Refund	\$ 116.40	Check #: 16716
106-0016005-02	Smith, Jason and Kenneth	12/21/2023	Refund	\$ 108.30	Check #: 16717
106-0016032-02	Scandalis, Richard	12/21/2023	Refund	\$ 6.19	Check #: 16718
106-0016375-01	Spadaro, Conrad	12/21/2023	Refund	\$ 5.76	Check #: 16719
112-1023429-02	Apostoli, Justin	12/21/2023	Refund	\$ 243.39	Check #: 16720
112-1028485-01	Sahota, Raman and Ranvir	12/21/2023	Refund	\$ 7.09	Check #: 16721
112-1028513-01	Compton, Joshua and Carey	12/21/2023	Refund	\$2,259.24	Check #: 16722
112-1029851-01	Lao, Jeffrey and Shemeel	12/21/2023	Refund	\$ 117.21	Check #: 16723
112-1029934-00	Tim Lewis Communities	12/21/2023	Refund	\$ 112.32	Check #: 16724
115-1025548-04	Swanson, Gabrielle and Tyler	12/21/2023	Refund	\$ 21.01	Check #: 16725
202-0017107-02	Esway, James and Kathy	12/21/2023	Refund	\$ 5.85	Check #: 16726
102-0003072-02	Schroeder, Eleanor and Samuel	12/21/2023	Refund	\$ 119.15	Check #: 16727
TOTAL REFUNDS				\$ 6,382.97	

**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STAFF REPORT**

To: Board of Directors

From: Eric Nielsen, District Superintendent

Cc: Herb Niederberger, General Manager

Subject: Resolution 24-01 Notice of Completion for the SPMUD Building Addition and Tenant Improvements Project

Meeting Date: January 4, 2024

Overview

The SPMUD Building Addition and Tenant Improvements Project included the construction of a new building addition, tenant improvements in existing buildings, and associated onsite improvements. The District awarded the SPMUD Building Addition and Tenant Improvements Project in May 2022, to Landmark Construction and the project was substantially complete on November 7th, 2023. The original contract price was \$3,838,000.00. The actual cost of construction was \$3,916,796.86 (2.05% increase). The project is ready for District acceptance.

A Notice of Completion has been prepared for the project with the assistance of the District's Legal Counsel. Once executed, the Notice of Completion will be filed at the Placer County Recorder's Office.

Recommendation

Staff recommends that the Board of Directors:

- Accept the improvements constructed as the SPMUD Building Addition and Tenant Improvements Project.
- Adopt Resolution 24-01 authorizing the General Manager to execute the Notice of Completion for the SPMUD Building Addition and Tenant Improvements Project.

Strategic Plan Goal

This action is consistent with the SPMUD Mission:

- Preparing for the future.

This action is consistent with the SPMUD Strategic Priority:

- Leverage existing and applicable technologies to improve efficiencies.

Attachments:

1. Notice of Completion SPMUD Building Addition and Tenant Improvements Project.
2. 24-01 Resolution of Acceptance of the SPMUD Building Addition and Tenant Improvements Project.

Recording Requested By
And Return To:

South Placer Municipal
Utility District
5807 Springview Drive
Rocklin, CA 95677

No Fee per Government
Code § 6103 and 27383

NOTICE OF COMPLETION

Notice is given by the SOUTH PLACER MUNICIPAL DISTRICT (the “District”), a public agency, 5807 Springview Drive, Rocklin California 95677, that the work known as SOUTH PLACER MUNICIPAL UTILITY DISTRICT/ Building Addition and Tenant Improvements Project (5807 Springview Dr, Rocklin, CA) was considered by the District to be completed on the 4th day of January, 2024. The undersigned caused the work to be performed and the contract was made with Landmark Construction (4312 Anthony Court, Suite B, Rocklin, CA 95677), to construct of a new building addition and tenant improvements in existing buildings, along with associated onsite improvements. The surety for said Contractor is Fidelity and Deposit Company of Maryland (1299 Zurich Way, Schaumburg, IL 60196-1056). Said work is situated in the City of Rocklin, Placer County, State of California.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed at Rocklin, California, this 4th day of January 2024.

SOUTH PLACER MUNICIPAL UTILITY DISTRICT

Herb Niederberger, General Manager

[Attach notary acknowledgment]

PROOF OF SERVICE DECLARATION

I, Eric Nielsen, declare that I served copies of the above NOTICE OF COMPLETION,

- a) By personally delivering copies to _____ at _____ on _____, _____, at _____, _____AM/PM.
- b) By Registered of Certified Mail, Express Mail or Overnight Delivery by an express service carrier, addressed to each of the parties at the address shown above on January 5, 2024.
- c) By leaving the notice and mailing a copy in the manner provided in § 415.20 of the California Code of Civil Procedure for service of Summon and Complaint in a Civil Action.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed at Rocklin, California, this 5th day of January 2024.

Signature of Person Making Service

SOUTH PLACER MUNICIPAL UTILITY DISTRICT

RESOLUTION NO. 24-01

ACCEPTANCE OF THE SPMUD BUILDING ADDITION AND TENANT IMPROVEMENTS PROJECT

WHEREAS, the South Placer Municipal Utility District (SPMUD) Board of Directors awarded the SPMUD Building Addition and Tenant Improvements Project (Project) construction contract in May of 2022, to Landmark Construction, and

WHEREAS, Landmark Construction completed the Project per the requirements of the contract documents and plans and specifications.

NOW, THEREFORE BE IT RESOLVED, by the Board of Directors of the South Placer Municipal Utility District to authorize the General Manager to execute the Notice of Completion for the SPMUD Building Addition and Tenant Improvements Project.

PASSED AND ADOPTED at a Regular Meeting of the South Placer Municipal Utility District Board of Directors at Rocklin, CA this 4th day of January 2024.

Signed: _____
James Durfee, President of the Board of Directors

Attest: _____
Emilie Costan, Board Secretary

**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STAFF REPORT**

To: Board of Directors

From: Herb Niederberger, General Manager

Cc: Eric Nielsen, District Superintendent
Emilie Costan, Administrative Services Manager
Carie Huff, District Engineer

Subject: Sewer Participation Charge Analysis

Meeting Date: January 4, 2024

Discussion

In accordance with the Municipal Utility District Act of the State of California (MUD Act) and the South Placer Municipal Utility District Sewer Code, Chapter 2.03, the District collects a Participation Charge (aka Capacity Fee) from all new customers connecting to the sewer collection system.

The Participation Charge, also called a Capacity or Connection Charge, consists of two components: a Local Participation Charge and a Regional Participation Charge. The Local Charge is used to fund the fair share portion of the cost of construction of the trunk sewer upgrades and expansion facilities that have been identified by the District's System Evaluation and Capacity Assurance Plan (SECAP) as necessary to serve new development within the District's service area boundaries. This fee is collected by the District during the construction process and deposited into Fund 300-Capital Expansion and Enlargement. The Regional Fee is also collected by the District and paid to the City of Roseville which oversees the operations and financing of the two regional treatment plants by the South Placer Wastewater Authority (SPWA). The Regional Fee pays for the SPWA debt service, maintains a Rate Stabilization Fund, and provides monies for additional expansions, modifications, or improvements to the Regional Wastewater Facilities.

In accordance with the requirements of State of California Government Code §66013, capacity fees must be based on the "reasonable cost" to accommodate additional demand from new development or the expansion of existing development. In addition to complying with GC §66013, compliance must be achieved with Proposition 26, which amended the State Constitution in 2010. Proposition 26 redefined a "tax" as any levy, charge, or exaction of any kind imposed by a local government. In other words, every charge is considered a tax that must be approved by the electorate, except for certain exemptions identified within Proposition 26. There are seven exemptions within Proposition 26, including a charge imposed for a specific benefit conferred directly to the payor that is not provided to those not charged and which does not exceed the reasonable costs to the local government of conferring the benefit imposed (i.e., capacity fees for service). In 2023, the Board adopted a capacity fee study that connects the proposed fee to the reasonable cost of improvements in compliance with GC §66013 and satisfies the Proposition 26 exemption.

Staff compared the most current Capacity Charges with several local jurisdictions that provide sewer services. With the exception of SASD which is structured similarly to the District., these other jurisdictions are local municipalities or county service areas. Unlike the District, they do not rely solely upon capacity charges to recover the cost of extension or enlargements to their system. Fee structures and the factors influencing them can vary significantly from district to district and municipality to municipality due to infrastructure requirements, financial situations, and local regulations. In California, municipalities, such as the City and County have the authority to establish their own regulations and guidelines for development projects, including sewer infrastructure. Therefore, the process and requirements can differ depending on the local jurisdiction. Independent sewer districts are financially self-sufficient entities that operate independently from local municipal governments. They rely on their own revenue sources, including capacity fees, to fund their costs. Municipal governments have access to a broader range of revenue streams such as sales, property, and other local taxes, as well as other sources, which can help subsidize the cost of sewer services and keep the fees comparatively lower. For example, the City of Citrus Heights has a program in place to reduce sewer impact fees for certain projects using Community and Economic Development funds.

In addition, jurisdictional agencies with authority over land use can mandate development to make certain improvements through the use of Development Agreements. Development Agreements are a tool to facilitate the construction of infrastructure, including sewer facilities. When it comes to sewer facilities, municipalities typically require developers to provide adequate sewage infrastructure to accommodate the increased capacity resulting from their development.

Because of this ability to negotiate Development Agreements, municipalities such as cities and counties can impose requirements such as the installation of backbone infrastructure i.e. sewer mains. A benefit of this is that cities and counties do not have to impose a separate development impact fee, or sewer capacity fee, to pay for sewer trunk facilities. As such they can avoid the regulatory requirements of imposing fees subject to GC §66000, et al. to pay for facilities. The cost of these facilities is simply embedded in the cost of development.

The results of the comparison are shown below. The District’s Sewer Capacity Charge of \$14,767/EDU is among the highest in the region.

Agency	Local Capacity Fee (Collections)	Regional Capacity Fee (Treatment)	Total Sewer Capacity Fee
Folsom	1369	6479	7,848.00
Placer County Livoti	1656	6479	8,135.00
Placer County SMD 1	1271	7698	8,969.00
Roseville	456	9852	10,308.00
SASD	4067	6479	10,546.00
Roseville SBA#3	1147	9852	10,999.00
Lincoln	3332	7699	11,031.00
Placer County SMD 2, 3, Area 28 Sunse	1468	9664	11,132.00
SPMUD	4915	9852	14,767.00
Roseville SBA#4	8159	9852	18,011.00

There remains a concern that the District's Participation Charge renders development within the District's Service Area at a competitive disadvantage to development opportunities in the surrounding areas. Staff has discovered an analysis of competing communities that indicates that communities served by the District are not at a development disadvantage.

In April 2021, the City of Roseville prepared a Regional Development Exaction Comparison that is included as Attachment 2 to this Staff Report. The purpose of Roseville's report is to present a comparative snapshot that examines the City's development exactions relative to surrounding jurisdictions. The City's intent is twofold: 1) to understand the exaction costs associated with development within the City of Roseville when compared to exactions for services and capital improvements associated with new development in other jurisdictions; and 2) to gauge Roseville's overall cost-competitiveness for development.

While the report was intended to highlight Roseville's position, it includes a comparison with the Northwest Rocklin (Whitney Oaks) development that is within the District's service area. This report contains several graphs and tables that conclude that the City of Rocklin is not at a competitive disadvantage to other jurisdictions. Included in this report are excerpts from Roseville's Regional Development Exaction Comparison.

The following two graphs indicate that Rocklin is well below the average exaction for both Single Family and Multi-Family Developments and among the lowest of the comparison group.

Roseville also provided details of the exactions for both Single and Multi-Family developments. District Staff notes that the Sewer Participation Charges are not correctly represented in the tables contained in Roseville's analysis. For example, the local charge for Northwest Rocklin is shown as \$268/EDU¹. This is actually the charge for the Northwest Rocklin Annexation Area refund agreement that is charged by the City of Rocklin to cover the cost of enlargement of the District's existing trunk line to accommodate development of Whitney Ranch (construction was completed in 2022 but acquisition of easements by the City of Rocklin is still outstanding). The Regional Charge of \$12,396 is actually the sum of both the Local Participation Charges and the Regional Charges that were in effect in 2021. Regardless, the sum of the Development Impact Fees that Rocklin exacts for both Single and Multi-Family Residential developments is among the lowest in the comparison group.

In addition, Staff points out the exaction category, Plan Area Impact Fees and Developer Contributions, for each of the comparison areas, indicate huge variances. This would substantiate the prior discussion regarding the ability of municipal governments to negotiate Development Agreements and impose requirements such as the installation of developer-borne backbone infrastructure.

It does not appear that the District's Participation Charges render communities served by the District, such as the City of Rocklin, at a competitive disadvantage for development.

¹ An EDU (Equivalent Dwelling Unit) is the basis for the Participation Charge. An EDU is used to determine design and fee requirements based on the typical average flow and strength of wastewater generated from a single-family residential (SFR) home.

Recommendation

Staff recommends that the Board of Directors receive and file this report:

Strategic Plan Goal

This action is consistent with the following SPMUD Strategic Plan Priorities:
Provide exceptional value for the cost of sewer service.

- 1) Maintain low service charges while meeting established service levels.

Related Policies and Ordinances

Sewer Code Chapter 2.03

Fiscal Impact

There is no fiscal impact from the details of this report.

Attachments

1. City of Roseville Regional Development Exaction Comparison, April 2021
2. SPMUD Sewer Participation Fee -Frequently Asked Questions

Figure S1 - Cumulative Single Family Residential Exactions by Jurisdiction (Per-Unit)

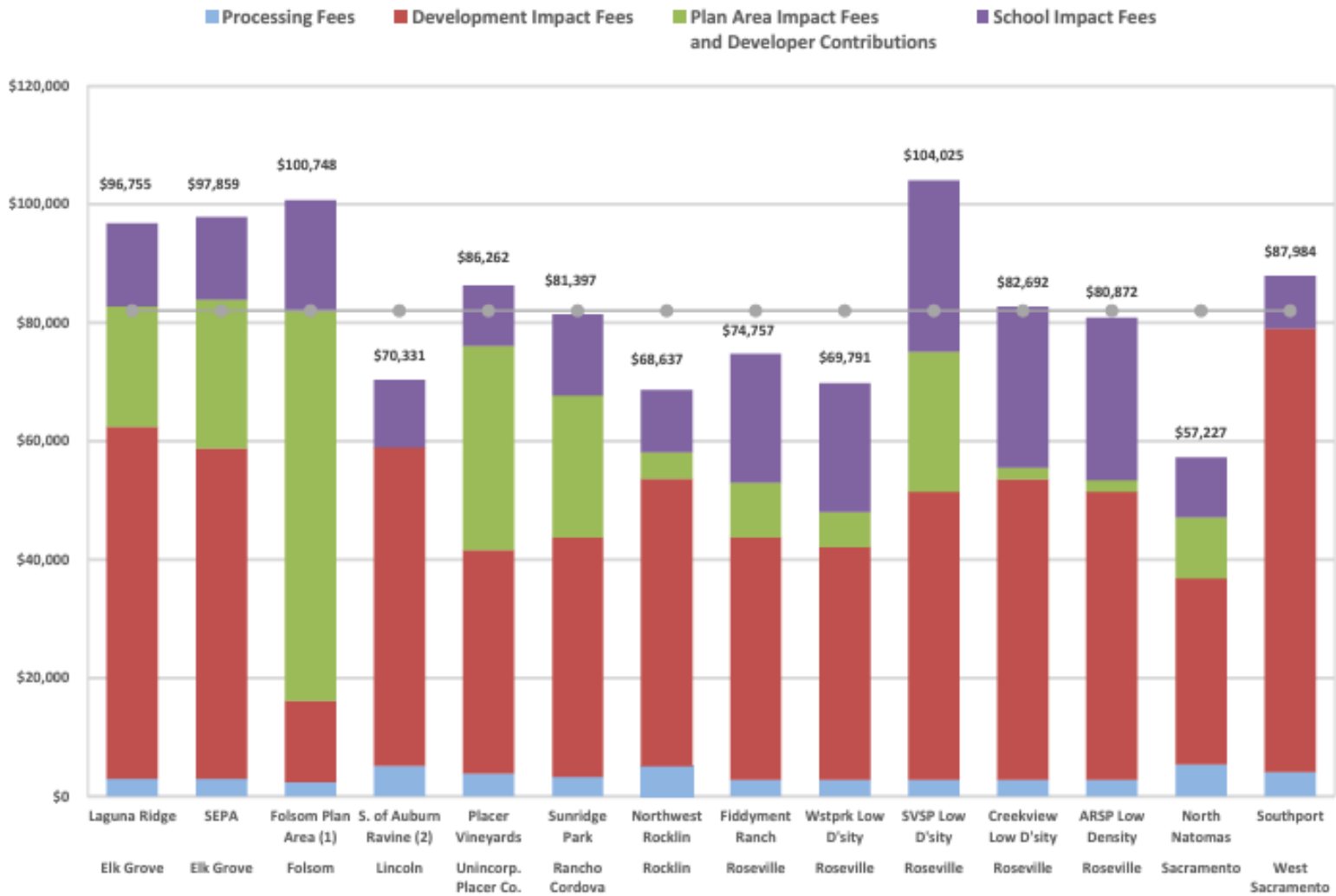


Figure S2 - Cumulative Multi-Family Residential Exactions by Jurisdiction (Per-Unit)



Table 1 - Detailed Single Family Residential Exactions by Jurisdiction

City	Elk Grove Laguna Ridge	Elk Grove SEPA	Folsom Folsom Plan Area (1)	Lincoln S. of Auburn Ravine (2)	Unincorp. Placer Co. Vineyards	Rancho Cordova Sunridge Park	Rocklin Northwest Rocklin	Roseville Fiddymont Ranch	Roseville Wstprk Low D'sity	Roseville SVSP Low D'sity	Roseville Creekview Low D'sity	Roseville ARSP Low Density	Sacramento North Natomas	West Sacramento Southport
Processing Fees														
Processing Fees	\$3,000	\$3,000	\$2,400	\$5,200	\$3,900	\$3,300	\$5,100	\$2,800	\$2,800	\$2,800	\$2,800	\$2,800	\$5,400	\$4,100
Total	\$3,000	\$3,000	\$2,400	\$5,200	\$3,900	\$3,300	\$5,100	\$2,800	\$2,800	\$2,800	\$2,800	\$2,800	\$5,400	\$4,100
Development Impact Fees														
Drainage / Flood	\$3,681			\$1,060	\$212	\$3,681		\$536	\$536	\$536	\$536	\$536	\$4,620	\$8,842
Affordable Housing	\$5,203	\$5,203	\$5,500											
Child Care														\$683
Library														
Conservation													\$3,798	
Police														\$1,306
Public Facilities	\$4,664	\$4,664		\$8,164	\$4,255	\$4,109	\$4,187	\$3,343	\$3,343	\$3,343	\$3,343	\$3,343	\$385	\$1,724
Fire	\$2,208	\$2,208				\$1,356		\$1,283	\$1,283	\$1,283	\$1,283	\$1,283		\$1,331
Parks/Open Space			\$94	\$453			\$2,696	\$6,619	\$7,677	\$6,790	\$7,352	\$7,352	\$5,757	\$17,006
Roadway - City	\$11,323	\$11,323		\$3,636			\$3,774	\$5,314	\$2,595	\$4,931	\$7,411	\$5,226	\$1,864	\$14,966
Roadway - Regional	\$4,634	\$4,634	\$1,329	\$8,859	\$4,624	\$1,329	\$2,999	\$2,330	\$2,330	\$10,288	\$9,394	\$9,394	\$1,356	\$1,382
Sewer - City				\$6,444			\$268	\$382	\$382	\$382	\$382	\$382	\$178	\$6,553
Sewer - Regional	\$9,780	\$9,780	\$6,479		\$8,951	\$9,780	\$12,396	\$8,267	\$8,267	\$8,267	\$8,267	\$8,267	\$9,780	\$6,479
Transit			\$35			\$179								
Water	\$17,985	\$17,985	\$301	\$22,826	\$19,665	\$17,985	\$19,339	\$10,529	\$10,529	\$10,529	\$10,529	\$10,529	\$3,696	\$10,229
Other				\$2,316			\$2,957	\$2,316	\$2,316	\$2,316	\$2,316	\$2,316		\$4,407
Total	\$59,479	\$55,797	\$13,738	\$53,757	\$37,707	\$40,457	\$48,616	\$40,919	\$39,258	\$48,665	\$50,813	\$48,628	\$31,434	\$74,908
Plan Area Impact Fees and Developer Contributions														
Plan Area Impact Fees	\$20,328	\$25,114	\$65,916	\$0	\$34,535	\$23,957	\$4,445	\$9,275	\$5,970	\$23,692	\$1,923	\$2,001	\$10,361	\$0
Total	\$20,328	\$25,114	\$65,916	\$0	\$34,535	\$23,957	\$4,445	\$9,275	\$5,970	\$23,692	\$1,923	\$2,001	\$10,361	\$0
School Impact Fees														
School Impact Fees	\$13,948	\$13,948	\$18,694	\$11,374	\$10,120	\$13,684	\$10,476	\$21,763	\$21,763	\$28,868	\$27,156	\$27,443	\$10,032	\$8,976
Total	\$13,948	\$13,948	\$18,694	\$11,374	\$10,120	\$13,684	\$10,476	\$21,763	\$21,763	\$28,868	\$27,156	\$27,443	\$10,032	\$8,976
Total	\$96,755	\$97,859	\$100,748	\$70,331	\$86,262	\$81,397	\$68,637	\$74,757	\$69,791	\$104,025	\$82,692	\$80,872	\$57,227	\$87,984

Notes:

- Amounts shown are estimates and are intended to provide order of magnitude information rather than exact figures.
- Amounts are based on interpretation of agency published fee schedules and information developed as part of prior regional fee comparisons.
- Amounts exclude impact/developer/mitigation fees for solid waste and electric.
- (1) Folsom Plan Area fees exclude Folsom Heights.
- (2) Lincoln South of Auburn Ravine development assumes SPRTA Tier 2 fees apply.

Table 2 - Detailed Multi-Family Residential Exactions by Jurisdiction

City	Elk Grove Laguna Ridge	Elk Grove SEPA	Folsom Folsom Plan Area (1)	Lincoln S. of Auburn Ravine (2)	Unincorp. Placer Co. Placer Vineyards	Rancho Cordova Sunridge Park	Rocklin Northwest Rocklin	Roseville Fiddymont Ranch	Roseville Sierra Vista	Roseville Creekview	City of Sacramento North Natomas	West Sacramento Southport
Development Area												
Processing Fees												
Processing Fees	\$1,300	\$1,300	\$1,300	\$1,100	\$1,900	\$1,900	\$1,100	\$2,200	\$2,200	\$2,200	\$1,900	\$2,100
Total	\$1,300	\$1,300	\$1,300	\$1,100	\$1,900	\$1,900	\$1,100	\$2,200	\$2,200	\$2,200	\$1,900	\$2,100
Development Impact Fees												
Drainage / Flood	\$1,118			\$254	\$135	\$1,118		\$467	\$467	\$467	\$1,020	\$4,308
Affordable Housing	\$3,121	\$3,121										
Child Care												\$256
Library												
Conservation											\$886	
Police												\$1,029
Public Facilities	\$3,486	\$3,486		\$5,977	\$3,054	\$3,211	\$2,130	\$2,229	\$2,229	\$2,229	\$250	\$1,359
Fire	\$1,454	\$1,454				\$1,059					\$1,059	\$1,048
Parks/Open Space			\$94	\$323			\$2,217	\$5,446	\$4,829	\$6,388	\$2,440	\$13,945
Roadway - City	\$7,868	\$7,868		\$2,618		\$2,073	\$2,378	\$3,295	\$3,057	\$4,595	\$843	\$11,895
Roadway - Regional	\$2,981	\$2,981	\$930	\$5,492	\$2,839	\$930	\$1,859	\$1,445	\$6,379	\$5,824	\$930	\$1,222
Sewer - City				\$5,153			\$268	\$382	\$382	\$382		\$4,915
Sewer - Regional	\$5,849	\$5,849	\$4,859		\$8,525	\$5,849	\$12,396	\$8,267	\$8,267	\$8,267	\$4,859	\$4,859
Transit			\$25			\$363						
Water	\$13,489	\$13,489	\$100	\$9,134	\$8,062	\$13,489	\$8,101	\$4,379	\$4,379	\$4,379	\$2,351	\$6,055
County Impact / Other				\$1,688			\$2,154	\$1,688	\$1,688	\$1,688		\$3,267
Total	\$39,365	\$38,248	\$6,008	\$30,639	\$22,616	\$28,092	\$31,503	\$27,597	\$31,676	\$34,219	\$14,637	\$54,158
Plan Area Impact Fees and Developer Contributions												
Plan Area Impact Fees	\$13,734	\$18,083	\$42,347	\$0	\$23,662	\$17,868	\$2,657	\$7,655	\$14,468	\$1,453	\$6,779	\$0
Total	\$13,734	\$18,083	\$42,347	\$0	\$23,662	\$17,868	\$2,657	\$7,655	\$14,468	\$1,453	\$6,779	\$0
School Impact Fees												
School Impact Fees	\$5,389	\$5,389	\$6,112	\$4,395	\$3,910	\$5,287	\$4,468	\$8,992	\$11,116	\$9,338	\$3,876	\$3,468
Total	\$5,389	\$5,389	\$6,112	\$4,395	\$3,910	\$5,287	\$4,468	\$8,992	\$11,116	\$9,338	\$3,876	\$3,468
Total	\$59,788	\$63,020	\$55,767	\$36,133	\$52,087	\$53,147	\$39,728	\$46,443	\$59,461	\$47,210	\$27,192	\$59,726

Notes:

- Amounts shown are estimates and are intended to provide order of magnitude information rather than exact figures.

- Amounts are based on interpretation of agency published fee schedules and information developed as part of prior regional fee comparisons.

DEVELOPMENT SERVICES DEPARTMENT

REGIONAL DEVELOPMENT EXACTION COMPARISON

APRIL 2021



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Development Exaction Comparative Analysis

Development Services Department
City of Roseville

Prepared by:

Development Services Department staff

Contact:

311 Vernon Street, Roseville CA 95678
(916) 774-5285

developmentservicesdept@roseville.ca.us

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OVERVIEW

The Development Services Department frequently collects data to compare the City's development exactions to those of surrounding jurisdictions. The content of this report reflects and builds on similar past efforts conducted periodically since 2012.

In 2012, the City commissioned Willdan Financial Services to provide a benchmark study comparing exactions for public services, facilities, and amenities required as a condition of land development approvals. The Willdan effort produced a side-by-side comparison of the exactions associated with six land use types and prototypical projects on twelve development sites.

The Department aims to update this document every four to five years, or as significant fee updates occur throughout the region that may warrant revisions. This document is produced by Development Services staff, with research assistance from ClearSource Financial Consulting (CSFC). ClearSource uses current year data published by other regional agencies to reflect a range of currently applicable fees for various project development scenarios. For consistency, the general format of reporting mirrors the format of prior studies, focusing on five specific land use types, including: single family residential, multi-family residential, retail/commercial, office, and industrial. The data presented herein compares Roseville's processing/permitting fees, development impact fees, plan area fees, required developer contributions, and school impact fees to project areas in other jurisdictions in the Sacramento region, including: Elk Grove, Folsom, Lincoln, Placer County, and the Cities of Rancho Cordova, Sacramento, and West Sacramento.

The purpose of this report is to present a comparative snapshot that examines the City's development exactions relative to surrounding jurisdictions. The City's intent is twofold: 1) to understand the exaction costs associated with development within the city of Roseville when compared to exactions for services and capital improvements associated with new development in other jurisdictions; and, 2) to gauge Roseville's overall cost-competitiveness for development.

Disclaimer: all development projects are unique. This document attempts to present exactions associated with "typical" land use types as a rough order of magnitude within specific geographic areas at a specific point in time. Therefore, fees assessed to individual projects may differ from those presented in this study.

SUMMARY OF FINDINGS

As indicated in Tables S1-S5, Roseville's fee structure remains competitive with the region, and is equal to or below median in all five land use types, as follows:

- **Single Family Residential** – The five representative project areas in the City of Roseville for single family residential development range from a high of \$104,025 to a low of \$69,791 per unit. The *median* exaction of the five Roseville project areas is \$80,872 per unit, which is 1% lower than the regional median of \$82,045 per unit.
- **Multi-Family Residential** – The three representative project areas in the City of Roseville for multi-family residential development range from a high of \$59,461 to a low of \$46,443 per unit. The *median* exaction of the four Roseville project areas is \$47,210 per unit, which is 10% lower than the regional median of \$52,617.
- **Retail** – The four representative project areas in the City of Roseville for retail development range from a high of \$43,736 to a low of \$16,854 per thousand square feet. The *median* exaction of the four Roseville project areas is \$17,552 per thousand square feet, which is 44% lower than the regional median of \$31,308.
- **Office** – The four representative project areas in the City of Roseville for office development range from a high of \$20,478 to a low of \$19,429 per thousand square feet. The *median* exaction of the four Roseville project areas is \$20,268 per thousand square feet, which is 26% lower than the regional median of \$27,328.
- **Industrial** – The three representative project areas in the City of Roseville for industrial development range from a high of \$7,857 to a low of \$6,672 per thousand square feet. The *median* exaction among the three Roseville project areas is \$7,404 per thousand square feet, which is 6% lower than the regional median of \$7,857.

Figure S1 - Cumulative Single Family Residential Exactions by Jurisdiction (Per-Unit)

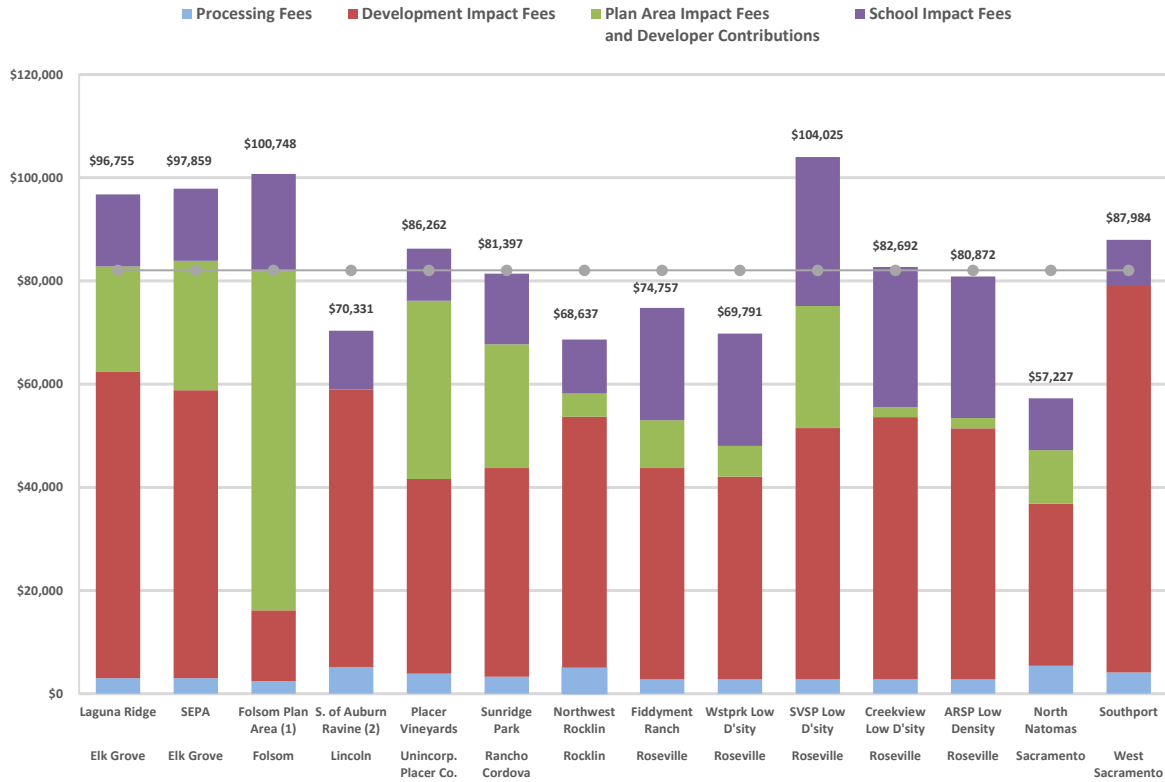


Figure S2 - Cumulative Multi-Family Residential Exactions by Jurisdiction (Per-Unit)



Figure S3 - Cumulative Retail Exactions by Jurisdiction (Per 1,000 Square-Feet)

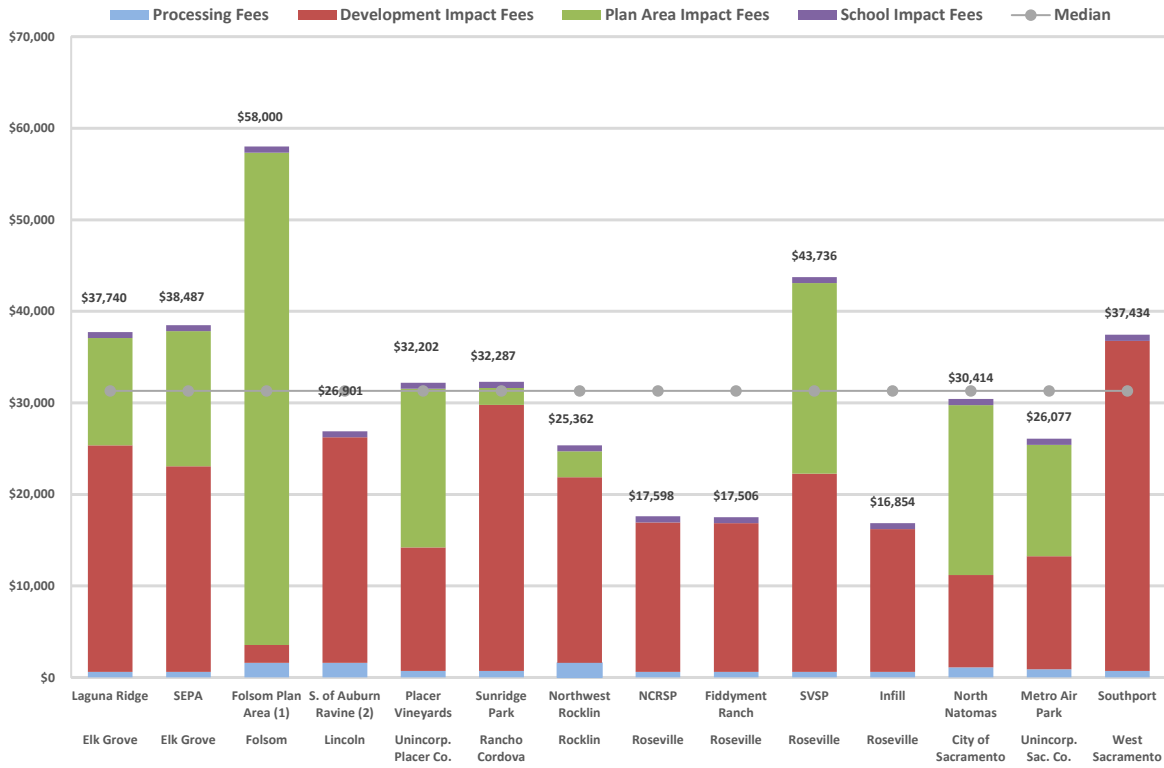


Figure S4 - Cumulative Office Exactions by Jurisdiction (Per 1,000 Square-Feet)

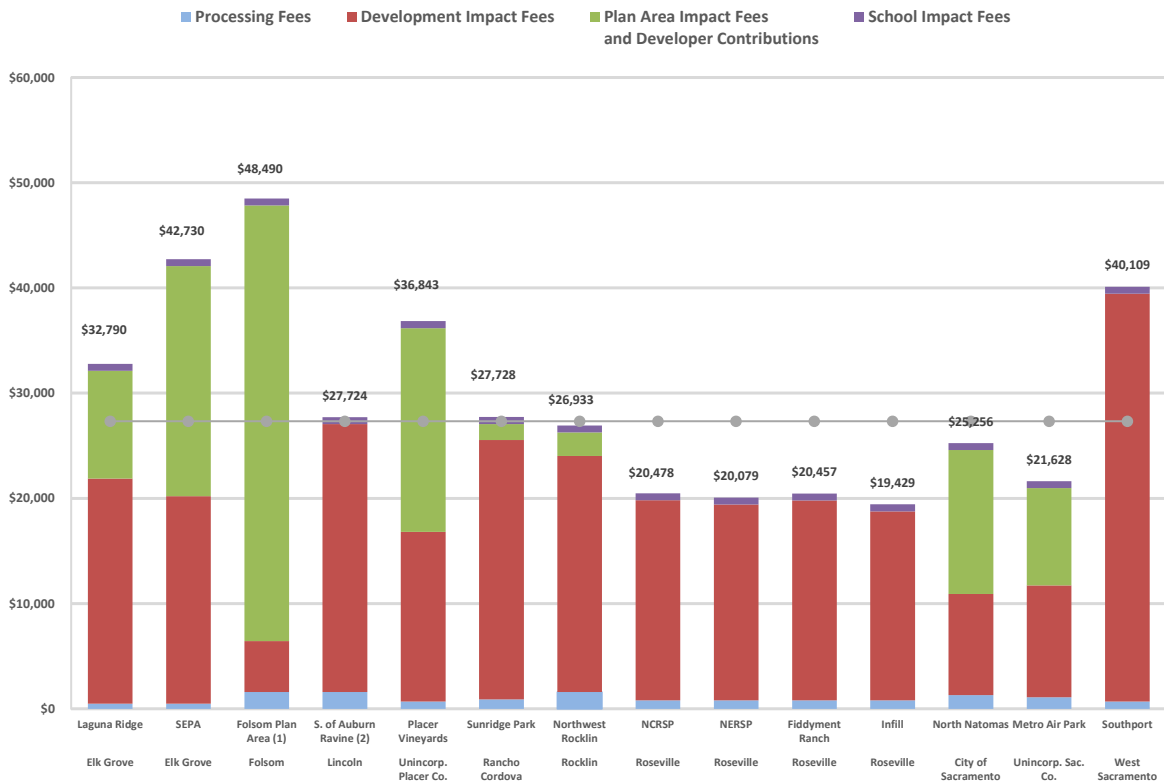


Figure S5 - Cumulative Industrial Exactions by Jurisdiction (Per 1,000 Square-Feet)



STUDY APPROACH

This report relies on data collected by surveying surrounding jurisdictions and quantifying the results for the five exaction categories. It also provides a cumulative cost associated with exactions in each of these jurisdictions, as well as an individual comparison of the Roseville-project median to the comparative regional-project median in the various exaction categories.

The approach and methodology was to determine the amount of exactions imposed on comparable plan areas compared to costs associated with similar project areas that have development potential in Roseville. The survey attempts to quantify and categorize all fees associated with the construction of the typical land use types within Roseville compared to the surveyed jurisdictions.

Exceptions

Note that the information presented is a best attempt to align exactions between the surveyed jurisdictions for each land use type. Each jurisdiction has a different approach to exactions and fees. This report attempts to align the fees/exactions as closely as possible; however, exceptions to keep in mind include:

1. Fees shown are intended to represent a rough order of magnitude rather than exact figures.
2. Fees are based on interpretation of agency published fee schedules.
3. Consistent with past analyses, solid waste and electric fees have been excluded due to unreconcilable variations between service providers for the project areas analyzed.
4. The surveyed project areas were approved at different points in time, making them subject to different fee schedules and unique development-specific obligations. For example, residential development in the Westpark component of the West Roseville Specific Plan (WRSP) does not have the same fee obligations as the Fiddymont Ranch neighborhood of the WRSP, where a downtown benefit fee was implemented through the development agreement amendment associated with a specific plan amendment. This situation is also true of surrounding regional projects.
5. The date on which projects were approved has a significant influence on the cumulative fee total. For example, more recent projects are being assessed regional capital improvement fees (e.g., Tier 2 traffic fees) that might not have been in place at the time an older project was approved. The same is true for a project that does not result in regional impacts requiring mitigation.

Exaction Categories

The following defines the exactions contained in the survey results compiled by CSFC:

- **Processing Fees:** Building and permit fees charged by planning and building departments as part of the planning and land use entitlement stage.
- **Development Impact Fees:** One-time charges imposed on new development to finance infrastructure that must be built or expanded as a result of the new development. These fees are designed to offset the impact of new development and associated population growth on the municipality's infrastructure and services. Impact fees are typically for improvements in or near a specific project area, within larger zones or plan areas, or city- or county-wide capital improvements.

- **Plan Area Impact Fees and Developer Contributions:**

- Plan Area Impact Fees: One-time fees assessed on new development within specific plan areas necessary to fund the facilities required to accommodate growth and mitigate specific plan impacts. These fees are not typically applied on a citywide basis, but are associated with development of a specific plan area and are contained within corresponding development agreements. Examples include the community benefit fee, various joint powers authority fees, and the South Placer Regional Transportation Authority fee. Plan area fees may also include costs resulting from project litigation, such as the air quality fee in the WRSP.
- Developer Contributions: A Developer assumes repayment for financing of exactions not included in fee programs. These can include, but are not limited to, capital funding provisions within development agreements. Project areas may also provide credits for impact fees and reimbursements from future impact fees paid by other developers served by the same facilities.

- **School Impact Fees**: School fees are one-time fees assessed on new development that must be spent on school-related capital improvements required to increase capacity to accommodate growth. School fees are directly established and collected by the local school districts; the City exercises no control or discretion over school impact fees.

Surveyed Projects

Five typical land use types were examined from a sampling of specific/master plan areas in Roseville and surrounding jurisdictions.

Single Family Development - Fourteen project areas, including five from Roseville, were examined for single family residential development costs:

Surrounding Jurisdictions

- Laguna Ridge – City of Elk Grove
- South East Plan Area – City of Elk Grove
- Folsom Plan Area – City of Folsom
- South of Auburn Ravine – City of Lincoln
- Placer Vineyards – Placer County
- Sunridge Park – City of Rancho Cordova
- Northwest Rocklin- City of Rocklin
- North Natomas – City of Sacramento
- Southport – City of West Sacramento

Roseville

- Amoruso Ranch Specific Plan
- Sierra Vista Specific Plan
- Creekview Specific Plan
- West Roseville Specific Plan (Fiddymont Ranch and Westpark)

Multi-Family Development - Twelve project areas, including three from Roseville, were examined for multi-family development costs:

Surrounding Jurisdictions

- Laguna Ridge – City of Elk Grove
- South East Plan Area – City of Elk Grove
- Folsom Plan Area – City of Folsom
- South of Auburn Ravine – City of Lincoln
- Placer Vineyards – Placer County
- Sunridge Park – City of Rancho Cordova
- Northwest Rocklin- City of Rocklin
- North Natomas – City of Sacramento
- Southport – City of West Sacramento

Roseville

- West Roseville Specific Plan (Fiddymont Ranch)
- Creekview Specific Plan
- Sierra Vista Specific Plan

Retail/Commercial Development – Fourteen project areas, including four from Roseville, were examined for retail/commercial development costs:

Surrounding Jurisdictions

- Laguna Ridge – City of Elk Grove
- South East Plan Area – City of Elk Grove
- Folsom Plan Area – City of Folsom
- Lincoln Crossing – City of Lincoln
- Placer Vineyards – Placer County
- Sunridge Park – City of Rancho Cordova
- Northwest Rocklin- City of Rocklin
- North Natomas – City of Sacramento
- Southport – City of West Sacramento
- Metro Air Park – Sacramento County

Roseville

- West Roseville Specific Plan (Fiddymont Ranch)
- North Central Roseville Specific Plan
- Infill
- Sierra Vista Specific Plan

Office Development - Fourteen project areas, including four from Roseville, were examined for retail and office development costs:

Surrounding Jurisdictions

- Laguna Ridge – City of Elk Grove
- South East Plan Area – City of Elk Grove
- Folsom Plan Area – City of Folsom
- Lincoln Crossing – City of Lincoln
- Placer Vineyards – Placer County
- Sunridge Park – City of Rancho Cordova
- Northwest Rocklin- City of Rocklin
- North Natomas – City of Sacramento
- Southport – City of West Sacramento
- Metro Air Park – Sacramento County

Roseville

- West Roseville Specific Plan (Fiddymont Ranch)
- North Central Roseville Specific Plan
- Infill
- Northeast Roseville Specific Plan

Industrial Development - Five project areas, including three from Roseville, were examined for industrial development costs:

Surrounding Jurisdictions

- North Natomas – City of Sacramento
- Metro Air Park – Sacramento County

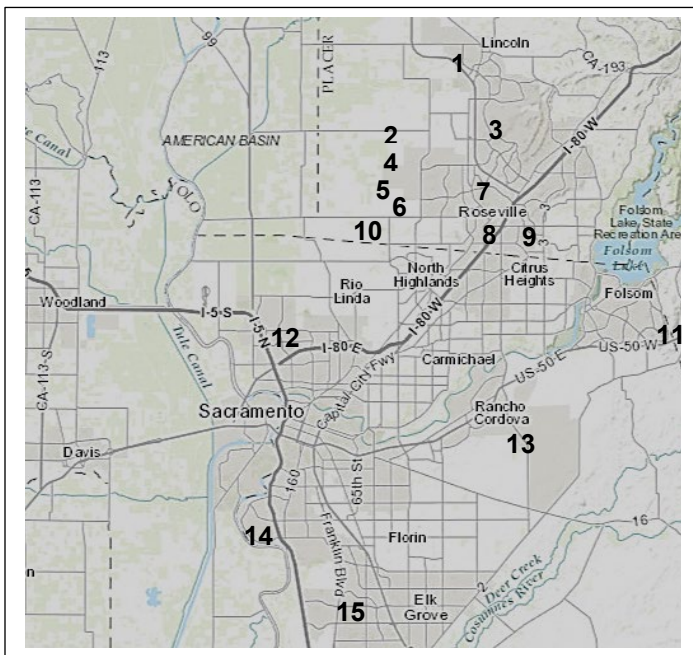
Roseville

- West Roseville Specific Plan (Westpark)
- North Central Roseville Specific Plan
- North Industrial Plan Area

Since many of the growth areas have limited or no industrial development potential, the sample size for industrial exactions is smaller than that for the other land uses surveyed.

Figure 1 identifies the locations of the project areas examined in this study.

Figure 1 - Surveyed Project Areas



1. Lincoln – South of Auburn Ravine
2. Amoruso Ranch Specific Plan
3. Whitney Ranch
4. Creekview Specific Plan
5. West Roseville Specific Plan
6. Sierra Vista Specific Plan
7. North Central Roseville Specific Plan
8. Roseville Infill Area
9. Northeast Roseville Specific Plan
10. Placer Vineyards
11. Folsom Specific Plan Area
12. North Natomas
13. Sunridge Park
14. Southport
15. Laguna Ridge and South East Plan Area

FEES BY LAND USE TYPE

This segment addresses each of the five land use types examined in the survey. The following presents a regional fee comparison that summarizes the total exactions associated with the development of each use type. The exaction categories include: processing fees, development impact fees, plan area fees and developer contributions, and school impact fees. The exaction categories are further highlighted to reflect how Roseville compares with surrounding jurisdictions.

Single Family Residential Land Use

The following evaluates the five exaction categories associated with development of single family residential units throughout the region. Fourteen project areas, including five from Roseville, were examined. The five Roseville projects include:

- West Roseville Specific Plan (Fiddymnt Ranch)
- Amoruso Ranch Specific Plan
- Creekview Specific Plan
- Sierra Vista Specific Plan
- West Roseville Specific Plan (Westpark)

Individual Roseville projects are higher and lower, but for purposes of comparison to the regional median, the five Roseville projects are combined and presented as the “Roseville median.”

1. CUMULATIVE RESULTS

All single-family residential exactions are presented on a per-unit basis. The cumulative results are summarized by exaction category in Figure 2.

Figure 2 - Cumulative Single Family Residential Exactions by Jurisdiction (Per-Unit)

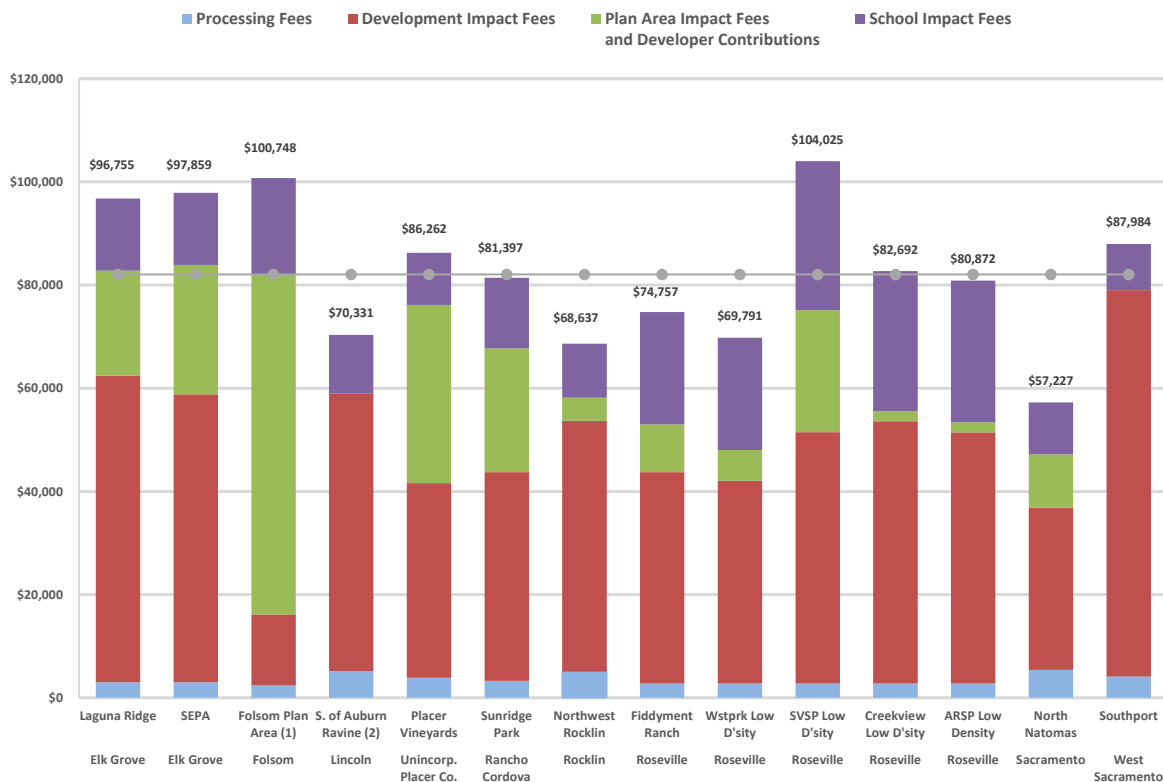


Figure 2 indicates that the North Natomas project area in the city of Sacramento has the lowest cumulative fees at \$57,227 per unit. In contrast, the Sierra Vista Specific Plan in the city of Roseville has the highest cumulative total at \$104,025 per unit.

The five representative project areas in the City of Roseville for single family residential development range from a high of \$104,025 to a low of \$69,791 per unit. The median exaction of the five Roseville project areas is 1% lower than the regional median of \$82,045 per unit.

Table 1 provides a detailed breakdown of costs by jurisdiction.

Table 1 - Detailed Single Family Residential Exactions by Jurisdiction

City	Elk Grove Laguna Ridge	Elk Grove SEPA	Folsom Folsom Plan Area (1)	Lincoln S. of Auburn Ravine (2)	Unincorp. Placer Co. Placer Vineyards	Rancho Cordova Sunridge Park	Rocklin Northwest Rocklin	Roseville Fiddymnt Ranch	Roseville Wstprk Low D'sity	Roseville SVSP Low D'sity	Roseville Creekview Low D'sity	Roseville ARSP Low Density	Sacramento North Natomas	West Sacramento Southport
Processing Fees														
Processing Fees	\$3,000	\$3,000	\$2,400	\$5,200	\$3,900	\$3,300	\$5,100	\$2,800	\$2,800	\$2,800	\$2,800	\$2,800	\$5,400	\$4,100
Total	\$3,000	\$3,000	\$2,400	\$5,200	\$3,900	\$3,300	\$5,100	\$2,800	\$2,800	\$2,800	\$2,800	\$2,800	\$5,400	\$4,100
Development Impact Fees														
Drainage / Flood	\$3,681			\$1,060	\$212	\$3,681		\$536	\$536	\$536	\$536	\$536	\$4,620	\$8,842
Affordable Housing	\$5,203	\$5,203	\$5,500											
Child Care														\$683
Library													\$3,798	
Conservation														
Police														\$1,306
Public Facilities	\$4,664	\$4,664		\$8,164	\$4,255	\$4,109	\$4,187	\$3,343	\$3,343	\$3,343	\$3,343	\$3,343	\$385	\$1,724
Fire	\$2,208	\$2,208				\$1,356		\$1,283	\$1,283	\$1,283	\$1,283	\$1,283		\$1,331
Parks/Open Space			\$94	\$453			\$2,696	\$6,619	\$7,677	\$6,790	\$7,352	\$7,352	\$5,757	\$17,006
Roadway - City	\$11,323	\$11,323		\$3,636		\$2,038	\$3,774	\$5,314	\$2,595	\$4,931	\$7,411	\$5,226	\$1,864	\$14,966
Roadway - Regional	\$4,634	\$4,634	\$1,329	\$8,859	\$4,624	\$1,329	\$2,999	\$2,330	\$2,330	\$10,288	\$9,394	\$9,394	\$1,356	\$1,382
Sewer - City				\$6,444			\$268	\$382	\$382	\$382	\$382	\$382	\$178	\$6,553
Sewer - Regional	\$9,780	\$9,780	\$6,479		\$8,951	\$9,780	\$12,396	\$8,267	\$8,267	\$8,267	\$8,267	\$8,267	\$9,780	\$6,479
Transit			\$35			\$179								
Water	\$17,985	\$17,985	\$301	\$22,826	\$19,665	\$17,985	\$19,339	\$10,529	\$10,529	\$10,529	\$10,529	\$10,529	\$3,696	\$10,229
Other				\$2,316			\$2,957	\$2,316	\$2,316	\$2,316	\$2,316	\$2,316		\$4,407
Total	\$59,479	\$55,797	\$13,738	\$53,757	\$37,707	\$40,457	\$48,616	\$40,919	\$39,258	\$48,665	\$50,813	\$48,628	\$31,434	\$74,908
Plan Area Impact Fees and Developer Contributions														
Plan Area Impact Fees	\$20,328	\$25,114	\$65,916	\$0	\$34,535	\$23,957	\$4,445	\$9,275	\$5,970	\$23,692	\$1,923	\$2,001	\$10,361	\$0
Total	\$20,328	\$25,114	\$65,916	\$0	\$34,535	\$23,957	\$4,445	\$9,275	\$5,970	\$23,692	\$1,923	\$2,001	\$10,361	\$0
School Impact Fees														
School Impact Fees	\$13,948	\$13,948	\$18,694	\$11,374	\$10,120	\$13,684	\$10,476	\$21,763	\$21,763	\$28,868	\$27,156	\$27,443	\$10,032	\$8,976
Total	\$13,948	\$13,948	\$18,694	\$11,374	\$10,120	\$13,684	\$10,476	\$21,763	\$21,763	\$28,868	\$27,156	\$27,443	\$10,032	\$8,976
Total	\$96,755	\$97,859	\$100,748	\$70,331	\$86,262	\$81,397	\$68,637	\$74,757	\$69,791	\$104,025	\$82,692	\$80,872	\$57,227	\$87,984

Notes:

- Amounts shown are estimates and are intended to provide order of magnitude information rather than exact figures.
- Amounts are based on interpretation of agency published fee schedules and information developed as part of prior regional fee comparisons.
- Amounts exclude impact/developer/mitigation fees for solid waste and electric.
- (1) Folsom Plan Area fees exclude Folsom Heights.
- (2) Lincoln South of Auburn Ravine development assumes SPRTA Tier 2 fees apply.

2. ROSEVILLE VS. REGIONAL MEDIAN BY EXACTION CATEGORY (SINGLE FAMILY)

This section examines the median exactions for the five Roseville project areas compared to the regional median.

Figure 3 - Processing Fees (Single Family)

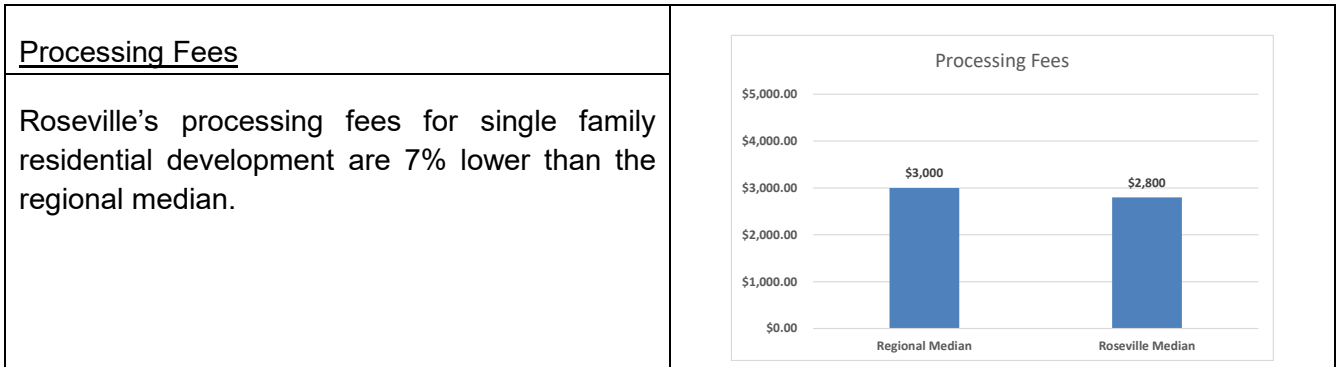


Figure 4 - Development Impact Fees (Single Family)

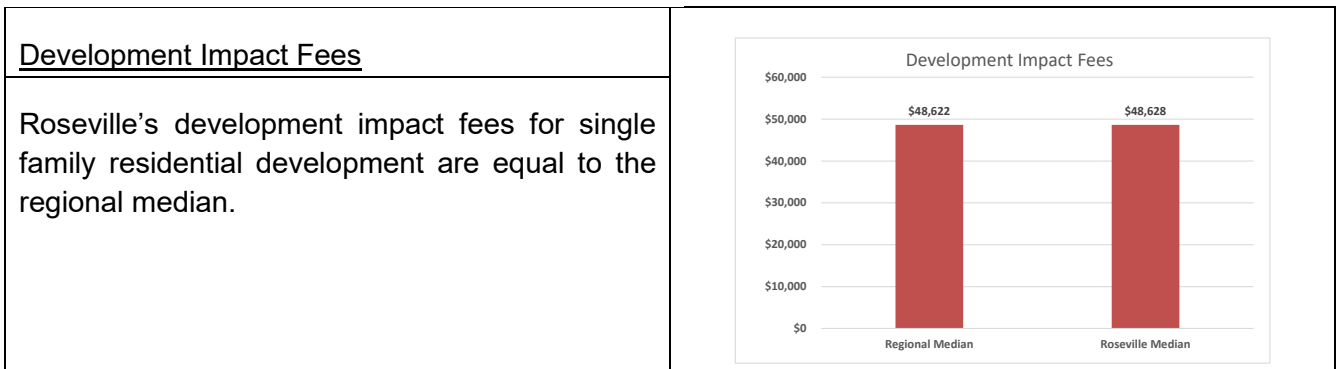


Figure 5 - Plan Area Fees and Developer Contributions (Single Family)

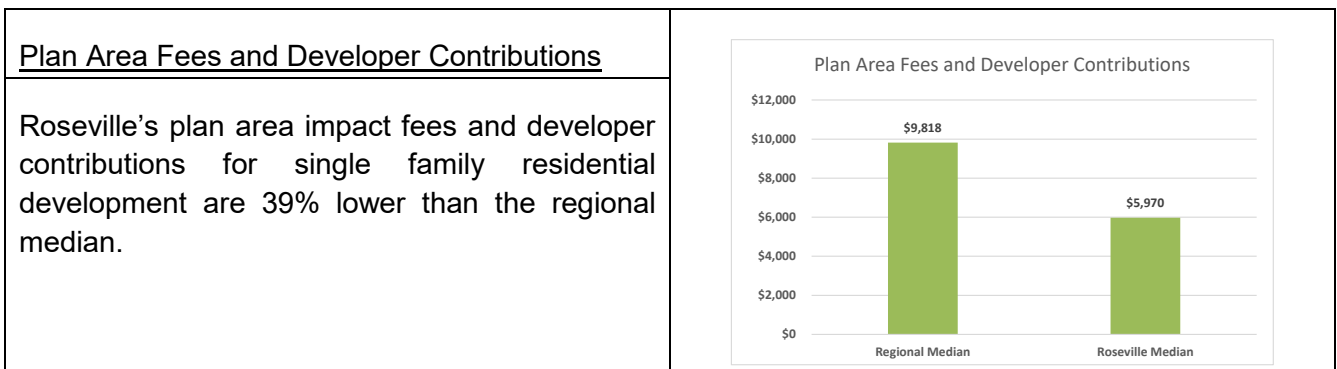
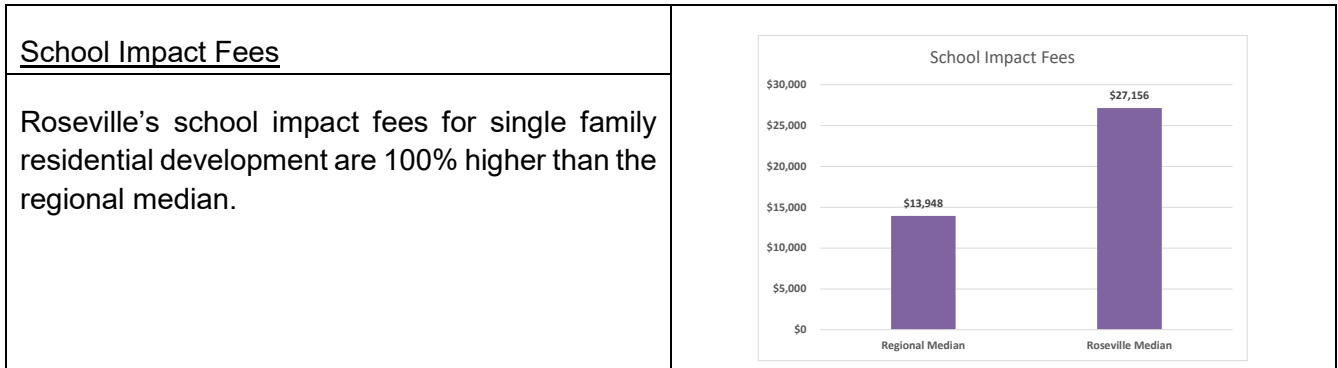


Figure 6 – School Impact Fees (Single Family)



3. SINGLE FAMILY RESIDENTIAL FINDINGS

At \$80,872 per unit, the City of Roseville’s median single family residential development exactions are 1% lower than the regional median of \$82,045 per unit

Multi-Family Residential Land Use

The following evaluates the five exaction categories associated with development of multi-family residential units throughout the region. Twelve project areas, including three from Roseville, were examined. The three Roseville projects include:

- West Roseville Specific Plan (Fiddymment Ranch)
- Creekview Specific Plan
- Sierra Vista Specific Plan

Individual Roseville projects are higher and lower, but for purposes of comparison to the regional median, the four Roseville projects are combined and presented as the “Roseville median.”

1. CUMULATIVE RESULTS

All exactions are presented on a per-unit basis. The cumulative results are summarized by exaction category in Figure 7.

Figure 7 - Cumulative Multi-Family Residential Exactions by Jurisdiction (Per-Unit)

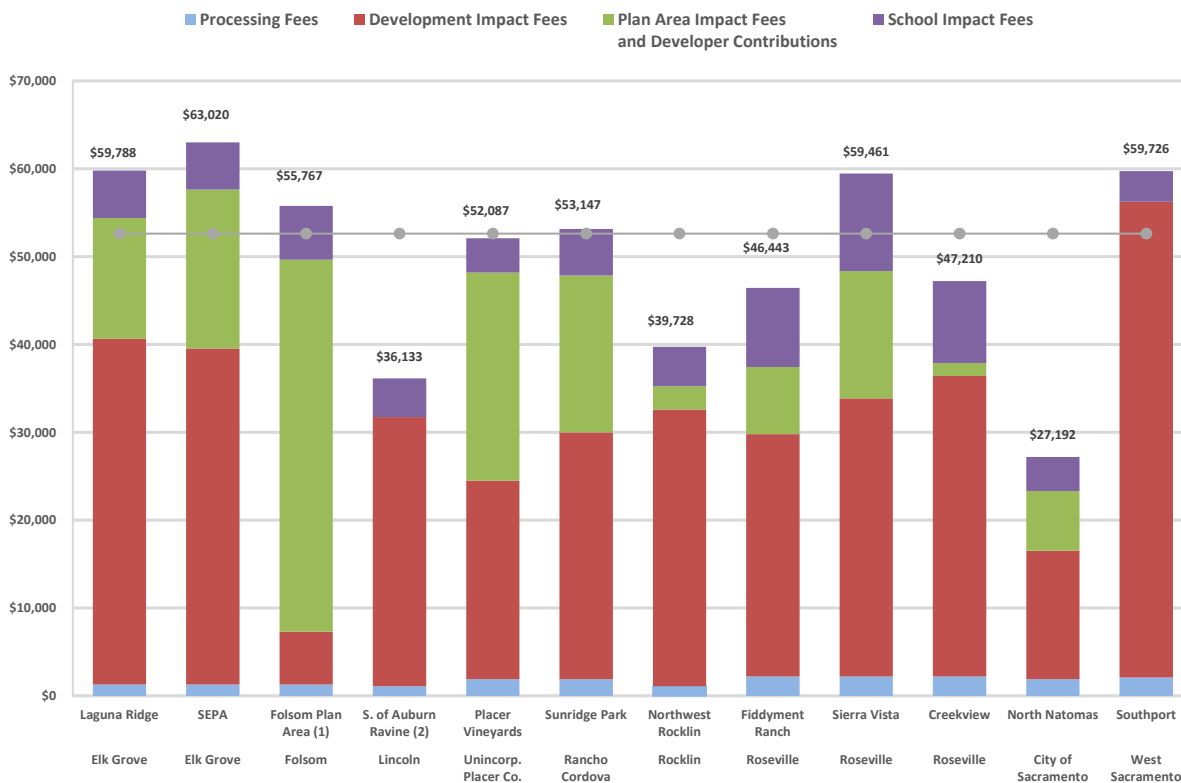


Figure 7 indicates that the North Natomas project area in the city of Sacramento has the lowest cumulative fees at \$27,192 per unit. In contrast, the South East Plan Area of Elk Grove has the highest cumulative total at \$63,020 per unit.

The three representative project areas in the city of Roseville for multi-family residential development range from a high of \$59,461 (SVSP) to a low of \$46,443 per unit (West Roseville Specific Plan –

Fiddymment Ranch). The median exaction of the three Roseville project areas is 10% lower than the regional median of \$52,617 per unit.

Table 2 provides a detailed breakdown of costs by jurisdiction.

Table 2 - Detailed Multi-Family Residential Exactions by Jurisdiction

City	Elk Grove Laguna Ridge	Elk Grove SEPA	Folsom Folsom Plan Area (1)	Lincoln S. of Auburn Ravine (2)	Unincorp. Placer Co. Placer Vineyards	Rancho Cordova Sunridge Park	Rocklin Northwest Rocklin	Roseville Fiddymment Ranch	Roseville Sierra Vista	Roseville Creekview	City of Sacramento North Natomas	West Sacramento Southport
Processing Fees												
Processing Fees	\$1,300	\$1,300	\$1,300	\$1,100	\$1,900	\$1,900	\$1,100	\$2,200	\$2,200	\$2,200	\$1,900	\$2,100
Total	\$1,300	\$1,300	\$1,300	\$1,100	\$1,900	\$1,900	\$1,100	\$2,200	\$2,200	\$2,200	\$1,900	\$2,100
Development Impact Fees												
Drainage / Flood	\$1,118			\$254	\$135	\$1,118		\$467	\$467	\$467	\$1,020	\$4,308
Affordable Housing	\$3,121	\$3,121										\$256
Child Care												
Library											\$886	
Conservation												\$1,029
Police											\$250	\$1,359
Public Facilities	\$3,486	\$3,486		\$5,977	\$3,054	\$3,211	\$2,130	\$2,229	\$2,229	\$2,229	\$1,059	\$1,048
Fire	\$1,454	\$1,454				\$1,059					\$1,059	\$1,048
Parks/Open Space			\$94	\$323			\$2,217	\$5,446	\$4,829	\$6,388	\$2,440	\$13,945
Roadway - City	\$7,868	\$7,868		\$2,618		\$2,073	\$2,378	\$3,295	\$3,057	\$4,595	\$843	\$11,895
Roadway - Regional	\$2,981	\$2,981	\$930	\$5,492	\$2,839	\$930	\$1,859	\$1,445	\$6,379	\$5,824	\$930	\$1,222
Sewer - City				\$5,153			\$268	\$382	\$382	\$382		\$4,915
Sewer - Regional	\$5,849	\$5,849	\$4,859		\$8,525	\$5,849	\$12,396	\$8,267	\$8,267	\$8,267	\$4,859	\$4,859
Transit			\$25			\$363						
Water	\$13,489	\$13,489	\$100	\$9,134	\$8,062	\$13,489	\$8,101	\$4,379	\$4,379	\$4,379	\$2,351	\$6,055
County Impact / Other				\$1,688			\$2,154	\$1,688	\$1,688	\$1,688		\$3,267
Total	\$39,365	\$38,248	\$6,008	\$30,639	\$22,616	\$28,092	\$31,503	\$27,597	\$31,676	\$34,219	\$14,637	\$54,158
Plan Area Impact Fees and Developer Contributions												
Plan Area Impact Fees	\$13,734	\$18,083	\$42,347	\$0	\$23,662	\$17,868	\$2,657	\$7,655	\$14,468	\$1,453	\$6,779	\$0
Total	\$13,734	\$18,083	\$42,347	\$0	\$23,662	\$17,868	\$2,657	\$7,655	\$14,468	\$1,453	\$6,779	\$0
School Impact Fees												
School Impact Fees	\$5,389	\$5,389	\$6,112	\$4,395	\$3,910	\$5,287	\$4,468	\$8,992	\$11,116	\$9,338	\$3,876	\$3,468
Total	\$5,389	\$5,389	\$6,112	\$4,395	\$3,910	\$5,287	\$4,468	\$8,992	\$11,116	\$9,338	\$3,876	\$3,468
Total	\$59,788	\$63,020	\$55,767	\$36,133	\$52,087	\$53,147	\$39,728	\$46,443	\$59,461	\$47,210	\$27,192	\$59,726

Notes:

- Amounts shown are estimates and are intended to provide order of magnitude information rather than exact figures.
- Amounts are based on interpretation of agency published fee schedules and information developed as part of prior regional fee comparisons.
- Amounts exclude impact/developer/mitigation fees for solid waste and electric.

(1) Folsom Plan Area fees exclude Folsom Heights.

(2) Lincoln South of Auburn Ravine development assumes SPRTA Tier 2 fees apply.

2. ROSEVILLE VS. REGIONAL MEDIAN BY EXACTION CATEGORY (MULTI-FAMILY)

This section examines the median exactions for the three Roseville project areas compared to the regional median.

Figure 8 - Processing Fees (Multi-Family)

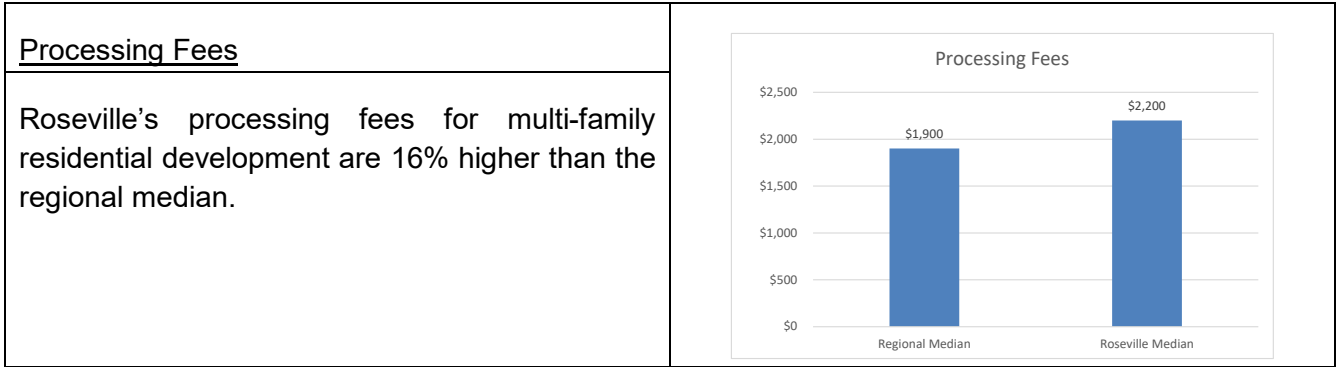


Figure 9 - Development Impact Fees (Multi-Family)

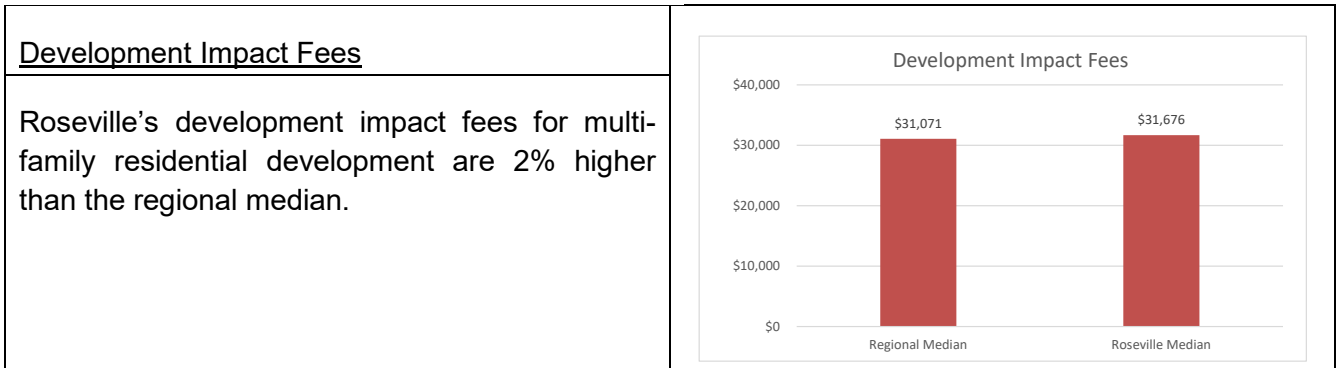


Figure 10 - Plan Area Fees and Developer Contributions (Multi-Family)

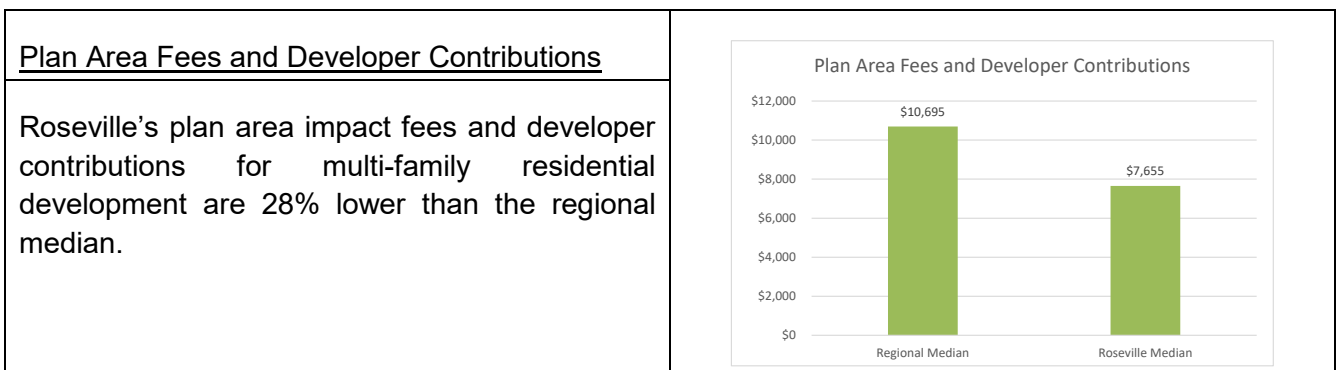
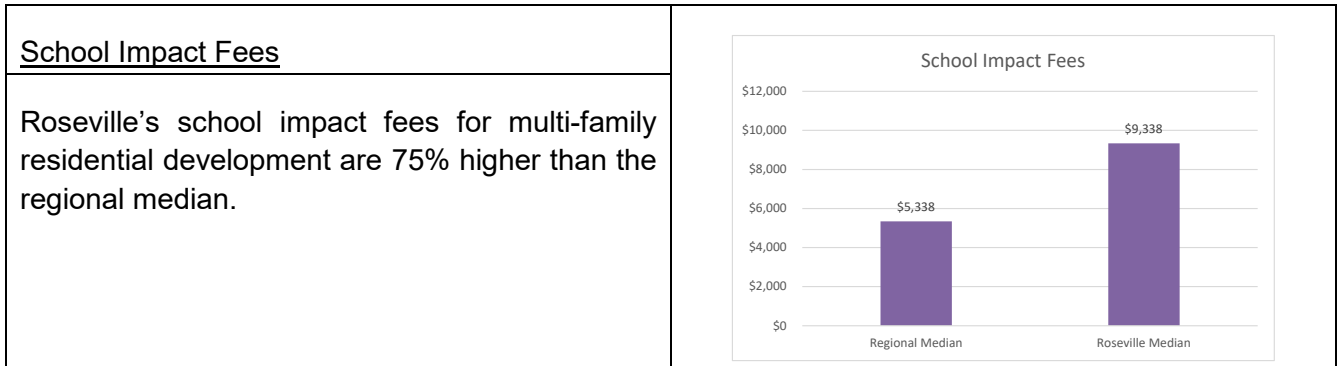


Figure 11 – School Impact Fees (Multi-Family)



3. MULTI-FAMILY RESIDENTIAL FINDINGS

At \$47,210 per unit, the City of Roseville’s *median* multi-family residential development exactions are 10% lower than the regional median of \$52,617.

Retail Land Use

The following evaluates the five exaction categories associated with development of retail projects throughout the region. Fourteen project areas, including four from Roseville, were examined. The four Roseville projects include:

- West Roseville Specific Plan (Fiddymment Ranch)
- Infill
- North Central Roseville Specific Plan
- Sierra Vista Specific Plan

Individual Roseville projects are higher and lower, but for purposes of comparison to the regional median, the five Roseville projects are combined and presented as the “Roseville median.”

1. CUMULATIVE RESULTS

All exactions are presented per-one thousand square feet. The cumulative results are summarized by exaction category in Figure 12.

Figure 12 - Cumulative Retail Exactions by Jurisdiction (Per 1,000 Square-Feet)

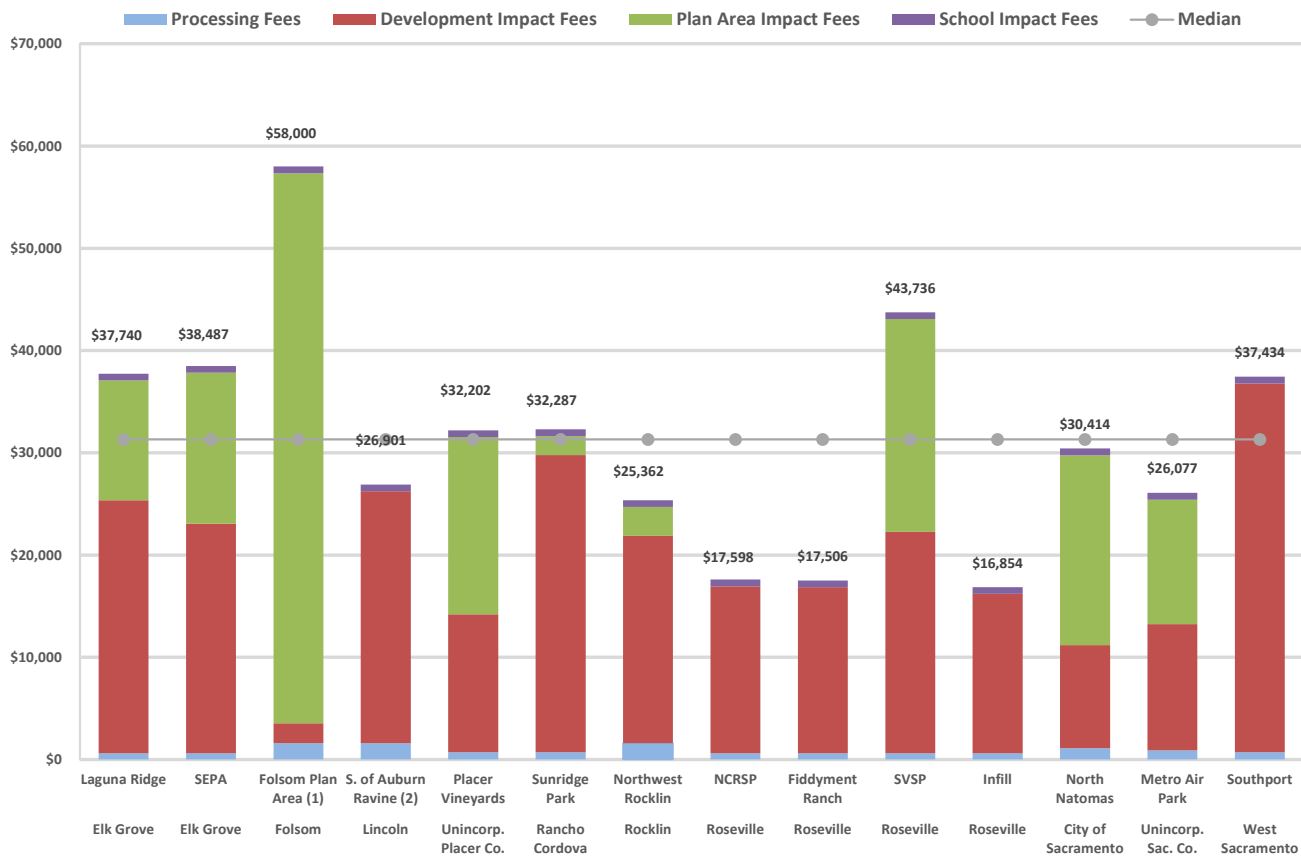


Figure 12 indicates that the Infill area in the city of Roseville has the lowest cumulative fees at \$16,854 per thousand square feet. In contrast, the Folsom Plan Area in the city of City of Folsom has the highest cumulative total at \$58,000 per thousand square feet.

The four representative project areas in the city of Roseville for retail development range from a high of \$43,736 (SVSP) to a low of \$16,854 (Infill) per thousand square feet. The *median* exaction of the four Roseville project areas is \$17,552, which is 44% lower than the regional median of \$31,308 per thousand square feet.

Table 3 provides a detailed breakdown of costs by jurisdiction.

Table 3 - Detailed Retail Exactions by Jurisdiction (Per 1,000 Square Feet)

City	Elk Grove Laguna Ridge	Elk Grove SEPA	Folsom Folsom Plan Area (1)	Lincoln S. of Auburn Ravine (2)	Unincorp. Placer Co. Placer Vineyards	Rancho Cordova Sunridge Park	Rocklin Northwest Rocklin	Roseville NCRSP	Roseville Fiddymont Ranch	Roseville SVSP	Roseville Infill	City of Sacramento North Natomas	Unincorp. Sac. Co. Metro Air Park	West Sacramento Southport
Development Area														
Processing Fees														
Processing Fees	\$600	\$600	\$1,600	\$1,600	\$700	\$700	\$1,600	\$600	\$600	\$600	\$600	\$1,100	\$900	\$700
Total	\$600	\$600	\$1,600	\$1,600	\$700	\$700	\$1,600	\$600	\$600	\$600	\$600	\$1,100	\$900	\$700
Development Impact Fees														
Drainage / Flood	\$2,274			\$519	\$37	\$2,274		\$640	\$640	\$640	\$640	\$1,600	\$1,600	\$8,546
Affordable Housing	\$850	\$850	\$1,700			\$770								\$513
Child Care														
Library														
Conservation												\$3,044		
Police														\$792
Public Facilities	\$1,350	\$1,350		\$2,883	\$577	\$520	\$1,120	\$640	\$640	\$640	\$640			\$1,045
Fire	\$1,870	\$1,870				\$715		\$312	\$312	\$312	\$312	\$715		\$806
Parks/Open Space				\$413								\$470		\$1,470
Roadway - City	\$10,250	\$10,250	\$20	\$4,625		\$17,020	\$6,038	\$7,347	\$6,759	\$6,272	\$7,347	\$499		\$16,214
Roadway - Regional	\$3,153	\$3,153		\$7,043	\$6,439	\$1,995	\$3,814	\$2,468	\$2,964	\$8,861	\$2,035	\$1,995	\$7,535	\$1,575
Sewer - City				\$3,451			\$156	\$127	\$127	\$127	\$127			\$1,554
Sewer - Regional	\$3,118	\$3,118			\$2,984	\$3,118	\$4,132	\$2,756	\$2,756	\$2,756	\$2,756	\$1,296	\$1,767	\$1,296
Transit			\$150			\$790								
Water	\$1,885	\$1,885	\$70	\$5,349	\$3,456	\$1,885	\$4,641	\$1,689	\$1,689	\$1,689	\$1,689	\$479	\$1,434	\$1,763
Other				\$360			\$360	\$360	\$360	\$360	\$360			\$500
Total	\$24,750	\$22,476	\$1,940	\$24,641	\$13,493	\$29,087	\$20,262	\$16,338	\$16,246	\$21,656	\$15,594	\$10,098	\$12,336	\$36,074
Plan Area Impact Fees and Developer Contributions														
Plan Area Impact Fees	\$11,730	\$14,751	\$53,800	\$0	\$17,349	\$1,840	\$2,840	\$0	\$0	\$20,820	\$0	\$18,556	\$12,180	\$0
Total	\$11,730	\$14,751	\$53,800	\$0	\$17,349	\$1,840	\$2,840	\$0	\$0	\$20,820	\$0	\$18,556	\$12,180	\$0
School Impact Fees														
School Impact Fees	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660
Total	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660
Total	\$37,740	\$38,487	\$58,000	\$26,901	\$32,202	\$32,287	\$25,362	\$17,598	\$17,506	\$43,736	\$16,854	\$30,414	\$26,077	\$37,434

Notes:

- Amounts shown are estimates and are intended to provide order of magnitude information rather than exact figures.
- Amounts are based on interpretation of agency published fee schedules and information developed as part of prior regional fee comparisons.
- Amounts exclude impact/developer/mitigation fees for solid waste and electric.

(1) Folsom Plan Area fees exclude Folsom Heights.

(2) Lincoln South of Auburn Ravine development assumes SPRTA Tier 2 fees apply.

2. ROSEVILLE VS. REGIONAL MEDIAN BY EXACTION CATEGORY (RETAIL)

This section examines the median exactions for the four Roseville project areas compared to the regional median.

Figure 13 - Processing Fees (Retail-Commercial)

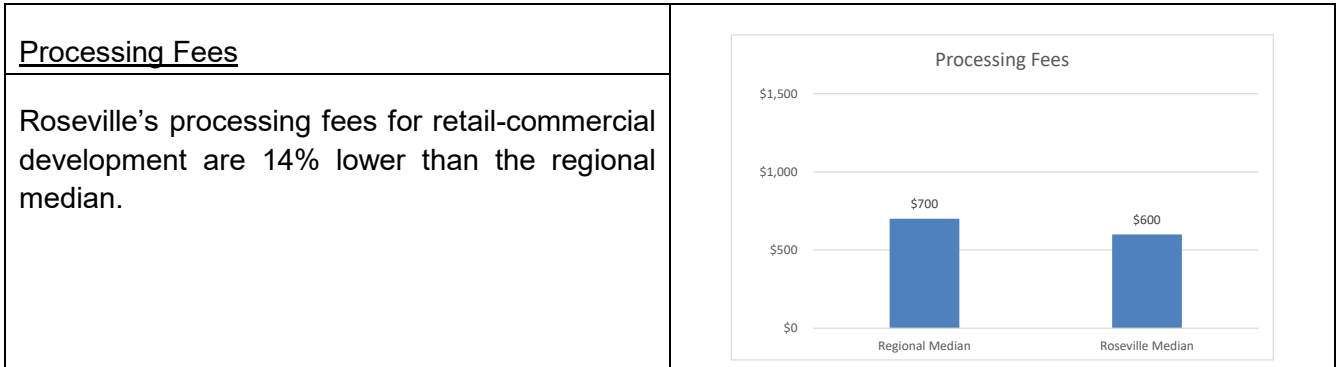


Figure 14 - Development Impact Fees (Retail-Commercial)

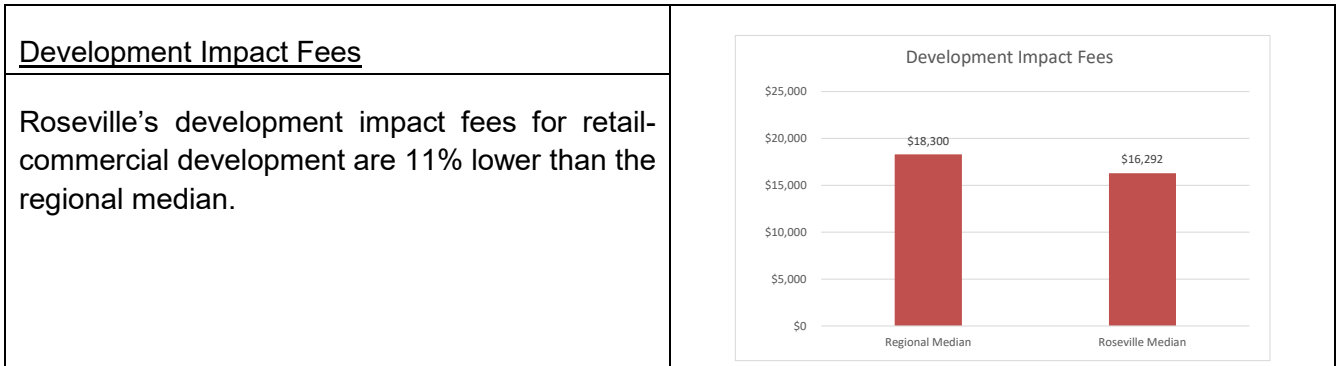


Figure 15 - Plan Area Fees and Developer Contributions (Retail-Commercial)

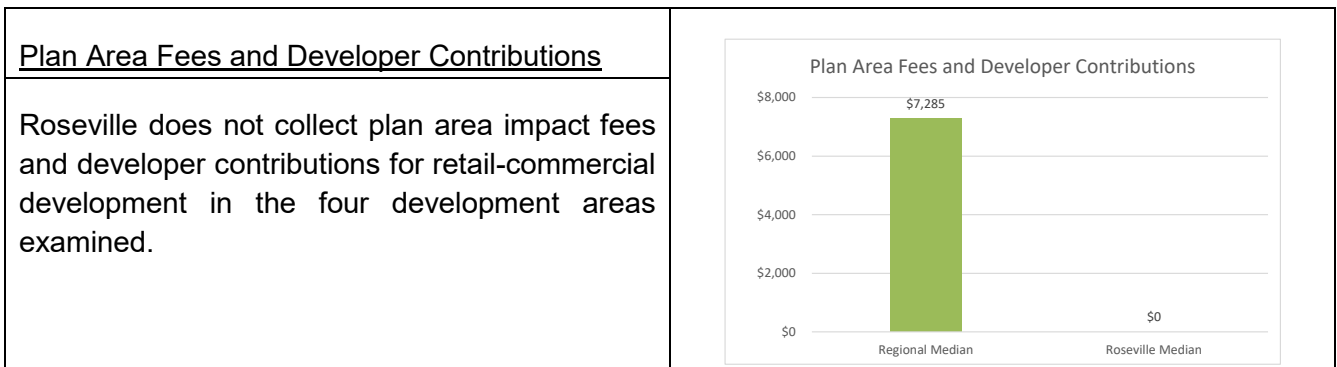
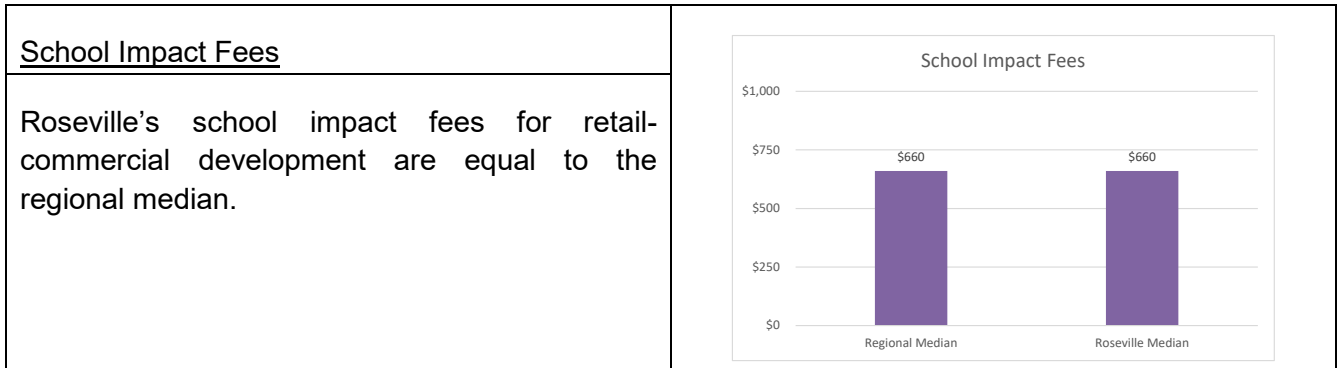


Figure 16 – School Impact Fees (Retail-Commercial)



3. RETAIL LAND USE FINDINGS

At \$17,552 per thousand square feet, the City of Roseville’s *median* retail development exactions are 44% lower than the regional median of \$31,308.

Office Land Use

The following evaluates the five exaction categories associated with development of office projects throughout the region. Fourteen project areas, including four from Roseville, were examined. The four Roseville projects include:

- West Roseville Specific Plan (Fiddymment Ranch)
- Infill
- North Central Roseville Specific Plan
- Northeast Roseville Specific Plan

Individual Roseville projects are lower than the regional median. For purposes of comparison to the regional median, the four Roseville projects are combined and presented as the “Roseville median.”

1. CUMULATIVE RESULTS

All exactions are presented per-one thousand square feet. The cumulative results are summarized by exaction category in Figure 17.

Figure 17 - Cumulative Office Exactions by Jurisdiction (Per 1,000 Square-Feet)

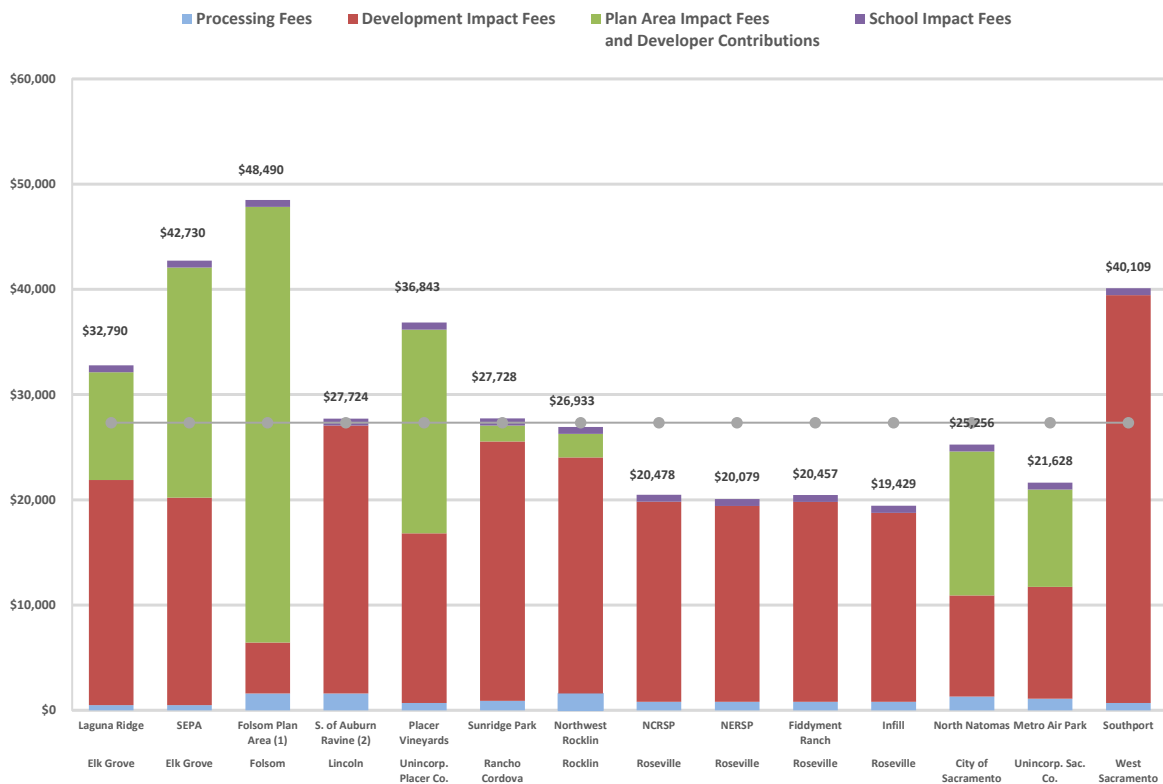


Figure 17 indicates that the Infill area in the city of Roseville has the lowest cumulative fees at \$19,429 per thousand square feet. In contrast, the Folsom Plan Area in the city of City of Folsom has the highest cumulative total at \$48,490 per thousand square feet.

The four representative project areas in the city of Roseville for office development range from a high of \$20,478 (NCRSP) to a low of \$19,429 (Infill) per thousand square feet. The *median* exaction of the four Roseville project areas is \$20,268, which is 26% lower than the regional median of \$27,328 per unit.

Table 4 provides a detailed breakdown of costs by jurisdiction.

Table 4 - Detailed Office Exactions by Jurisdiction (Per 1,000 Square Feet)

City	Elk Grove Laguna Ridge	Elk Grove SEPA	Folsom Folsom Plan Area (1)	Lincoln S. of Auburn Ravine (2)	Unincorp. Placer Co. Placer Vineyards	Rancho Cordova Sunridge Park	Rocklin Northwest Rocklin	Roseville NCRSP	Roseville NERSP	Roseville Fiddymnt Ranch	Roseville Infill	City of Sacramento North Natomas	Unincorp. Sac. Co. Metro Air Park	West Sacramento Southport
Processing Fees														
Processing Fees	\$500	\$500	\$1,600	\$1,600	\$700	\$900	\$1,600	\$800	\$800	\$800	\$800	\$1,300	\$1,100	\$700
Total	\$500	\$500	\$1,600	\$1,600	\$700	\$900	\$1,600	\$800	\$800	\$800	\$800	\$1,300	\$1,100	\$700
Development Impact Fees														
Drainage	\$1,681			\$519	\$37	\$1,681		\$473	\$241	\$473	\$473	\$1,600	\$1,600	\$6,829
Affordable Housing			\$1,700		\$970									
Child Care														\$683
Library														
Conservation												\$2,250		
Police														\$1,318
Public Facilities	\$1,670	\$1,670		\$2,883	\$937	\$850	\$1,490	\$840	\$840	\$840	\$840			\$1,740
Fire	\$1,870	\$1,870				\$1,186		\$442	\$442	\$442		\$1,186		\$1,343
Parks/Open Space			\$20	\$413								\$640		\$2,370
Roadway - City	\$9,740	\$9,740		\$6,483		\$13,610	\$6,604	\$8,947	\$8,947	\$8,231	\$8,947	\$707		\$16,857
Roadway - Regional	\$2,384	\$2,384	\$1,600	\$6,392	\$8,549	\$1,596	\$5,347	\$3,459	\$2,853	\$4,154	\$2,853	\$1,596	\$6,466	\$2,122
Sewer - City				\$3,451			\$156	\$127	\$127	\$127	\$127			\$1,942
Sewer - Regional	\$2,643	\$2,643	\$1,300		\$2,984	\$2,643	\$4,132	\$2,756	\$2,756	\$2,756	\$2,756	\$1,296	\$1,651	\$1,296
Transit			\$150			\$710								
Water	\$1,393	\$1,393	\$70	\$4,754	\$3,600	\$1,393	\$4,126	\$1,404	\$1,843	\$1,404	\$1,404	\$335	\$916	\$1,583
Other				\$570			\$570	\$570	\$570	\$570	\$570			\$666
Total	\$21,380	\$19,700	\$4,840	\$25,464	\$16,107	\$24,638	\$22,424	\$19,018	\$18,619	\$18,997	\$17,969	\$9,610	\$10,633	\$38,749
Plan Area Impact Fees and Developer Contributions														
Plan Area Impact Fees	\$10,250	\$21,870	\$41,390	\$0	\$19,376	\$1,530	\$2,249	\$0	\$0	\$0	\$0	\$13,685	\$9,235	\$0
Total	\$10,250	\$21,870	\$41,390	\$0	\$19,376	\$1,530	\$2,249	\$0	\$0	\$0	\$0	\$13,685	\$9,235	\$0
School Impact Fees														
School Impact Fees	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660
Total	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660	\$660
Total	\$32,790	\$42,730	\$48,490	\$27,724	\$36,843	\$27,728	\$26,933	\$20,478	\$20,079	\$20,457	\$19,429	\$25,256	\$21,628	\$40,109

Notes:
 - Amounts shown are estimates and are intended to provide order of magnitude information rather than exact figures.
 - Amounts are based on interpretation of agency published fee schedules and information developed as part of prior regional fee comparisons.
 - Amounts exclude impact/developer/mitigation fees for solid waste and electric.
 (1) Folsom Plan Area fees exclude Folsom Heights.
 (2) Lincoln South of Auburn Ravine development assumes SPRTA Tier 2 fees apply.

2. ROSEVILLE VS. REGIONAL MEDIAN BY EXACTION CATEGORY (OFFICE)

This section examines the median exactions for the four Roseville project areas compared to the regional median.

Figure 18 - Processing Fees (Office)

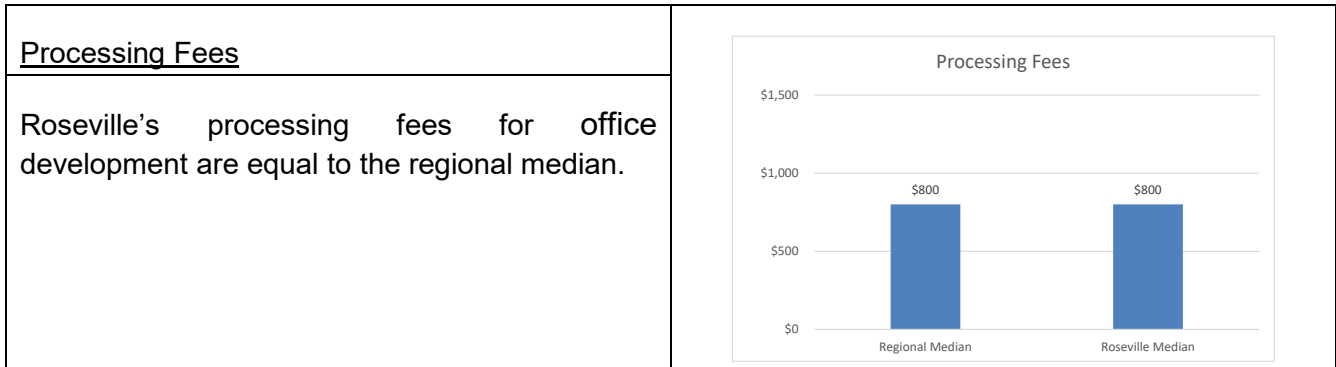


Figure 19 - Development Impact Fees (Office)

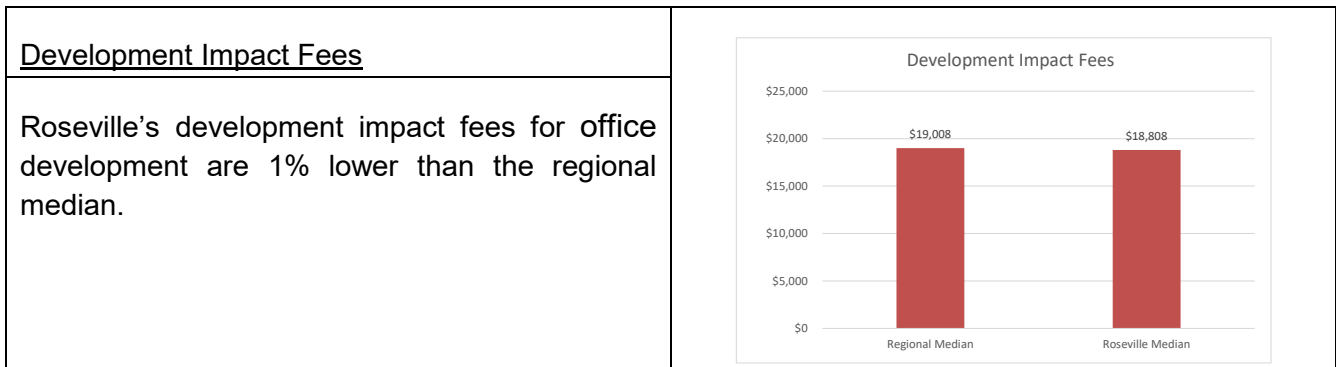


Figure 20 - Plan Area Fees and Developer Contributions (Office)

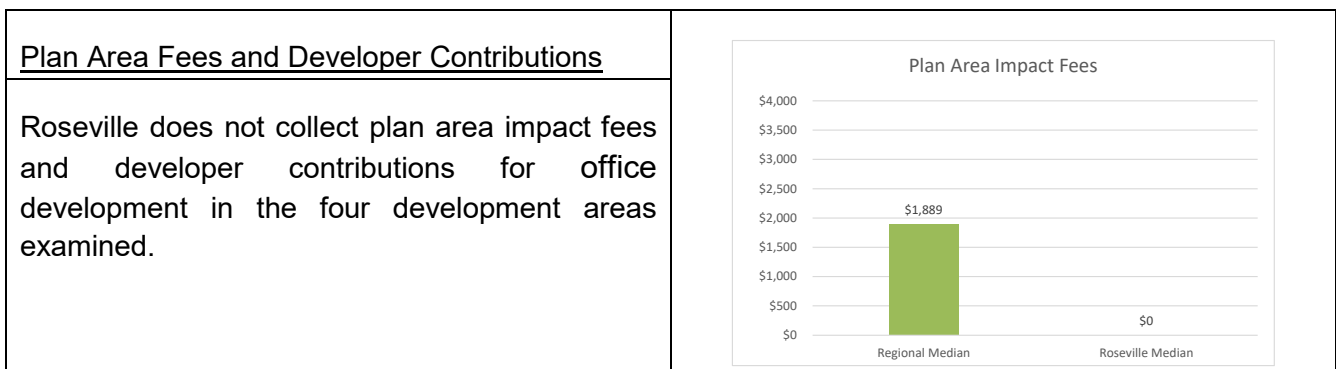
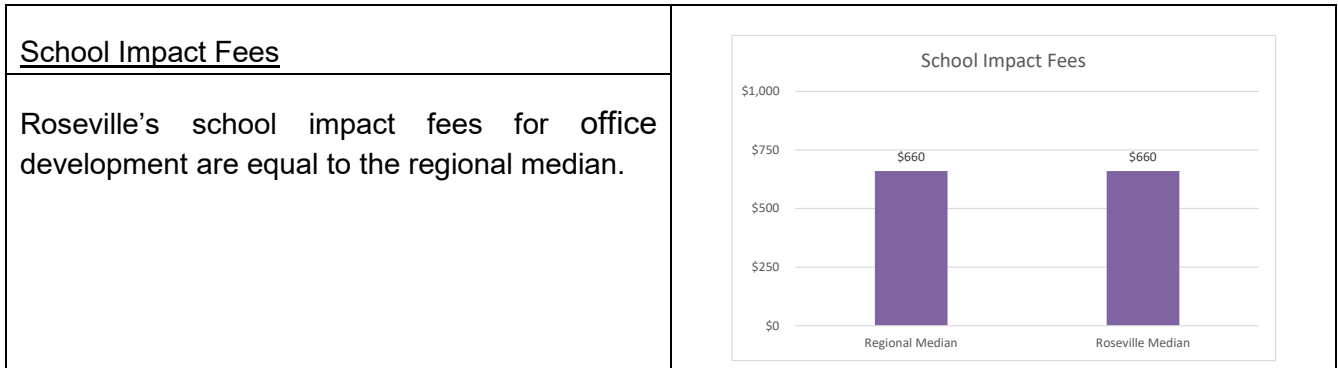


Figure 21 – School Impact Fees (Office)



3. OFFICE LAND USE FINDINGS

At \$20,268 per thousand square feet, the City of Roseville’s *median* office development exactions are 26% lower than the regional median of \$27,328.

Industrial Land Use

The following evaluates the five exaction categories associated with development of industrial projects throughout the region. Five project areas, including three from Roseville, were examined. The three Roseville projects include:

- West Roseville Specific Plan (Westpark)
- North Central Roseville Specific Plan
- North Industrial Plan Area

1. CUMULATIVE RESULTS

All exactions are presented per-one thousand square feet. The cumulative results are summarized by exaction category in Figure 22.

Figure 22 - Cumulative Industrial Exactions by Jurisdiction (Per 1,000 Square-Feet)



Figure 22 indicates that the West Roseville Specific Plan area (Westpark) in the city of Roseville has the lowest cumulative fees at \$6,672 per thousand square feet. In contrast, North Natomas in the City of Sacramento has the highest cumulative total at \$12,991 per thousand square feet.

The three representative project areas in the city of Roseville for industrial development range from a high of \$7,857 (NIPA) to a low of \$6,672 (Westpark) per thousand square feet. The *median* exaction of the three Roseville project areas is \$7,404, which is 6% lower than the regional median of \$7,857 per thousand square feet.

Table 5 provides a detailed breakdown of costs by jurisdiction.

Table 5 - Detailed Industrial Exactions by Jurisdiction (Per 1,000 Square Feet)

City	Roseville	Roseville	Roseville	City of Sacramento	Unincorp. Sac. Co.
Development Area	NCRSP	NIPA	Westpark	North Natomas	Metro Air Park
<u>Processing Fees</u>					
Processing Fees	\$500	\$500	\$500	\$900	\$1,000
Total	\$500	\$500	\$500	\$900	\$1,000
<u>Development Impact Fees</u>					
Drainage	\$396	\$396	\$396	\$1,160	\$1,160
Affordable Housing					
Child Care					
Library					
Conservation				\$1,886	
Police					
Public Facilities	\$420	\$420	\$420		
Fire	\$247	\$247	\$247	\$643	
Parks/Open Space				\$190	
Roadway - City	\$1,508	\$2,015	\$677	\$395	
Roadway - Regional	\$582	\$547	\$699	\$1,064	\$1,243
Sewer - City	\$76	\$76	\$76		
Sewer - Regional	\$1,653	\$1,653	\$1,653	\$1,115	\$1,115
Transit					
Water	\$1,071	\$1,053	\$1,053	\$251	\$768
Other	\$290	\$290	\$290		
Total	\$6,244	\$6,697	\$5,512	\$6,705	\$4,286
<u>Plan Area Impact Fees and Developer Contributions</u>					
Plan Area Impact Fees	\$0	\$0	\$0	\$4,726	\$2,898
Total	\$0	\$0	\$0	\$4,726	\$2,898
<u>School Impact Fees</u>					
School Impact Fees	\$660	\$660	\$660	\$660	\$660
Total	\$660	\$660	\$660	\$660	\$660
Total	\$7,404	\$7,857	\$6,672	\$12,991	\$8,844

2. ROSEVILLE VS. REGIONAL MEDIAN BY EXACTION CATEGORY (INDUSTRIAL)

This section examines the median exactions for the three Roseville project areas compared to the regional median.

Figure 23 - Processing Fees (Warehouse-Industrial)

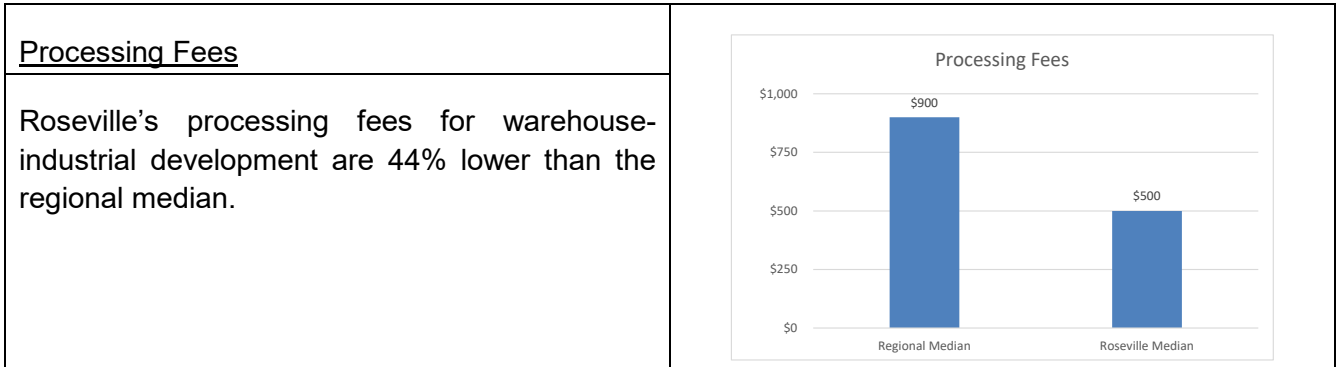


Figure 24 - Development Impact Fees (Warehouse-Industrial)

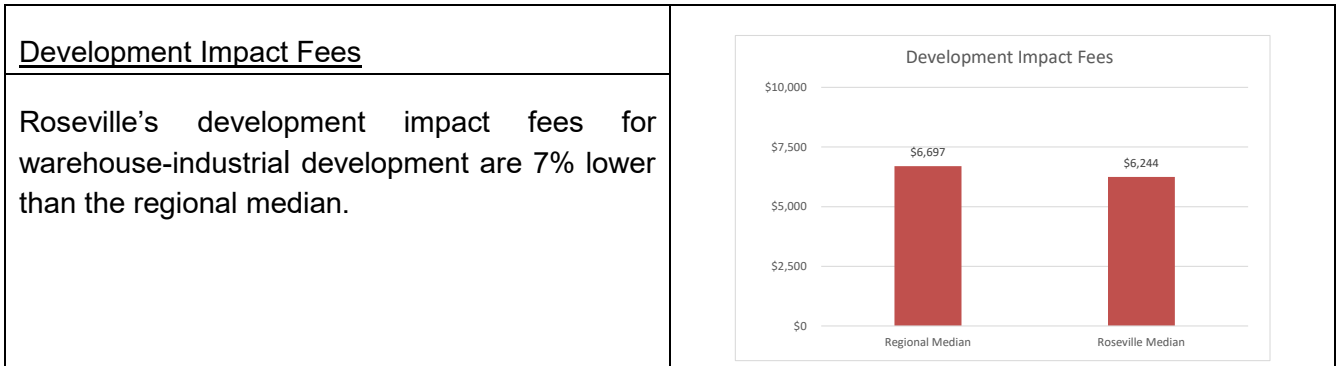


Figure 25 - Plan Area Fees and Developer Contributions (Warehouse-Industrial)

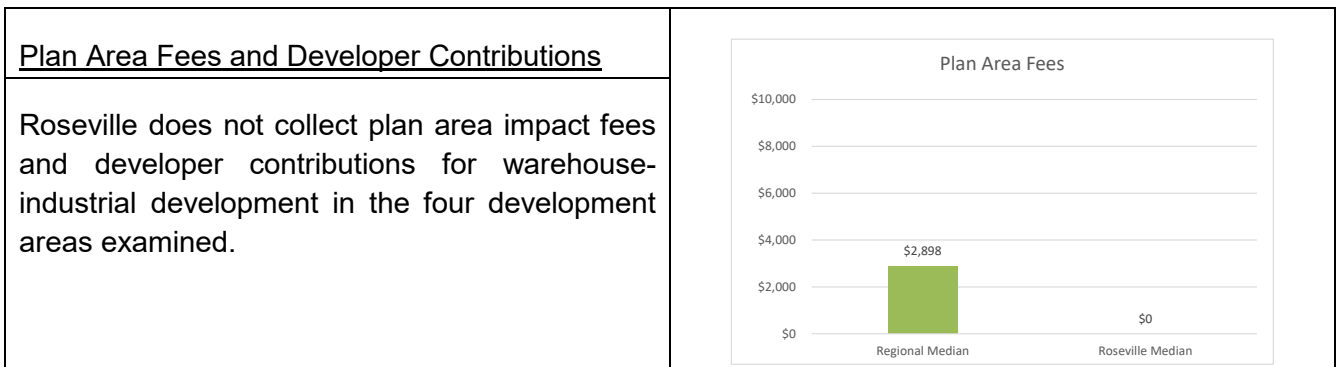
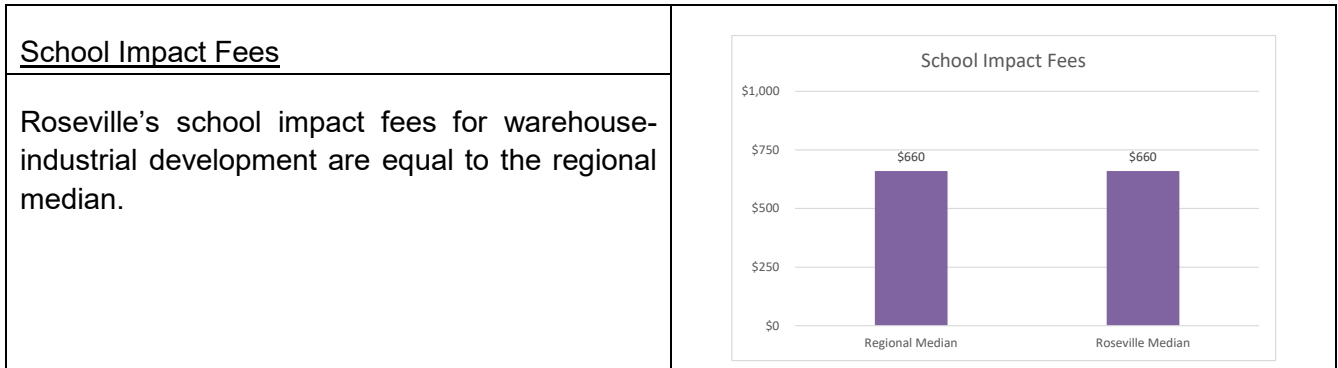


Figure 26 – School Impact Fees (Warehouse-Industrial)



3. INDUSTRIAL LAND USE FINDINGS

At \$7,404 per thousand square feet, the City of Roseville’s *median* industrial development exactions are 16% lower than the regional median of \$8,844 per thousand square feet.

**FREQUENTLY ASKED QUESTIONS (FAQS)
REGARDING THE SOUTH PLACER MUNICIPAL UTILITY DISTRICT
PARTICIPATION CHARGE DETERMINED BY
CHAPTER 2.03 OF THE SEWER CODE**

What is a Participation Charge?

The Participation Charge, also called a Capacity or Connection Fee, is paid to the District for the privilege of connecting to the District's facilities. The District's facilities shall include local collection systems, trunk lines, treatment plants, and capacity. The Participation Charge consists of two components: a Local Participation Charge and a Regional Participation Charge.

How is the Local Participation Charge Different from the Regional Participation Charge?

The Local Charge is used to fund required enlargements and expansion of the sewer collection system as identified by the District's System Evaluation and Capacity Assurance Plan (SECAP). The cost of growth-related future facilities is allocated to the new development to be served by the facilities. An allowance is made for existing capacity that may also serve new connections. Under this approach, new customers pay for the incremental investment necessary for system expansion. The Regional Charge is also collected by the District and paid to the City of Roseville, which oversees the operations and financing of the two regional treatment plants by the South Placer Wastewater Authority (SPWA). The Regional Charge pays for the SPWA debt service; maintains a Rate Stabilization Fund; provides monies for additional expansions, modifications, or improvements to the Regional Wastewater Facilities

How is the Participation Charge Determined?

California Government Code §66013 requires that capacity fees be based on the "reasonable cost" to accommodate additional demand from new development or the expansion of existing development. Fees must comply with Propositions 26 and 218.

How is the District's Participation Charge Determined?

The District's Local Participation Charge is a capacity fee based on an Incremental-Cost Approach as the District has a detailed listing of capital improvements necessary to serve new development identified within its SECAP. The SECAP identifies the upsizing of existing sewer trunk lines and new sewer trunk lines to convey flow from future developments within the service area to the regional treatment plants. Contingency, design, and administration costs are also included for these projects. These system improvements will serve the additional demand generated by new developments.

The basis for both the Monthly Service Charge and the Participation Charge is the Equivalent Dwelling Unit (EDU). An EDU is used to determine design and fee requirements based on the typical average flow and strength of wastewater generated from a single-family residential (SFR) home Charges and fees for wastewater generated from non-residential, commercial, or industrial

uses are calculated using factors found in Chapter 2.03.03 of the Sewer Code. Multi-family residential (MFR) users are assessed similarly to an SFR at 1 EDU per residential unit. In addition, there is no differentiation among MFR, age-restricted or low-income units. All residential units are assessed at the rate of 1 EDU per unit.

What is the District's Current Participation Charge?

The current Participation Charge is \$14,767 per Equivalent Dwelling Unit (EDU). This Charge is comprised of a \$4,915 Local Charge and a \$9,852 Regional Charge. The Participation Charge is reviewed regularly to ensure that the District is collecting sufficient revenue to pay for necessary system expansions and enlargements due to development. The Participation Charge is adjusted annually to keep up with construction costs. A history of the increases in the District (Local) and SPWA (Regional) Participation Charges for the years 2012 through 2024 is included as Attachment 1.

The District does not charge a Capacity Charge for Accessory Dwelling Units (ADU) as defined in the District Sewer Code, Chapter 2.03.05 and California Government Code Section 65852.2. Those ADUs that do not meet the definition within the Sewer Code and are created for individual home ownership are charged a Participation Charge.

Are there Other Funding Sources to Offset Participation Charges for Specific Uses?

In recent discussions, it has been suggested that the District use a portion of its ad valorem property tax revenues to reduce the Local Participation Charge for proposed low-income housing units. State and local government may expend public funds to achieve goals such as facilitating affordable housing solutions, so long as the expenditure is rationally related to a legitimate government interest, does not constitute a gift of public funds, and complies with Propositions 218 and 26.

Ad-Valorem taxes collected for the District are deposited into Fund 100 to supplement revenues and offset the Monthly Service Charge. As they are currently sourced, it renders these charges subject to Article XIII of the California State Constitution (Proposition 218). Prop 218 requires the following conditions:

1. An agency cannot collect revenue beyond what is necessary to provide service.
2. Revenues derived from the fee shall not be used for any other purpose other than that for which the charge was imposed.
3. The amount of the fee may not exceed the proportional cost-of-service for the parcel.
4. No fee may be imposed for a service unless that service is actually used or immediately available to the owner of a property.

There is a legitimate interest by local governments to assist in the development of affordable housing, even if the expenditure of public funds to further that objective benefits a private developer. However, it must be a legitimate expenditure and cannot constitute a gift of public funds. The problem faced by the District relates to the availability of discretionary funds to subsidize such objectives. The District does not have discretionary funds as does a city or county. The District's financial resources are exclusively dedicated to the enterprise of providing sewer

collection and treatment to ratepayers within its service area. Shifting already dedicated funds to enable such a subsidy would run afoul of Proposition 218's prohibition of rates and charges exceeding the reasonable cost of providing service, and would be considered an impermissible tax without voter approval as required by Proposition 26. A reduction in participation fees for one class of development may result in other developments or current customers paying a higher fee to cover the portion of the costs that were to have been paid by the property owner for whom the charges were reduced.

Based on the foregoing, it is the opinion of the District's General Counsel that the District is precluded under the law from using its ad valorem tax revenues to subsidize participation charges for one class of customers over another because the District's ad valorem tax revenues are dedicated to funding the District's sewer enterprise and are included within the District's rate structure. Unless the District chose to submit a special tax for voter approval for this purpose, another funding source would be needed to subsidize the enterprise fund.

Why are the District's Participation Charges Higher than Other Local Agencies?

Fee structures and the factors influencing them can vary significantly from district to district and municipality to municipality due to infrastructure requirements, financial situations, and local regulations. In California, municipalities, such as the City and County have the authority to establish their own regulations and guidelines for development projects, including sewer infrastructure. Therefore, the process and requirements can differ depending on the local jurisdiction. Independent sewer districts are financially self-sufficient entities that operate independently from local municipal governments. They rely on their own revenue sources, including capacity fees, to fund their costs. Municipal governments have access to a broader range of revenue streams such as sales, property, and other local taxes, as well as other sources, which can help subsidize the cost of sewer services and keep the fees comparatively lower.

In addition, jurisdictional agencies with authority over land use can mandate development to make certain improvements through the use of Development Agreements. Development agreements are a tool to facilitate the construction of infrastructure, including sewer facilities. When it comes to sewer facilities, municipalities typically require developers to provide adequate sewage infrastructure to accommodate the increased capacity resulting from their development.

Because of this ability to negotiate Development Agreements, municipalities such as cities and counties can impose requirements such as the installation of backbone infrastructure, streets, storm drains, water distribution systems, and sewer mains. A benefit of this is that cities and counties do not have to impose a separate development impact fee, or sewer capacity fee, to pay for sewer trunk facilities. As such they can avoid the regulatory requirements of imposing fees subject to GC §66000, et al. to pay for facilities. The cost of these facilities is simply embedded in the cost of development. City and County Governments and other jurisdictional agencies have the ability to include the District in a development agreement for a proposed development project so that sewer infrastructure could be provided to the District to offset the Local Participation Charge.

Can the District lower participation charges to stimulate economic development? Can costs be recovered later by increasing service fees?

California Government Code §66013 requires that capacity fees be based on the "reasonable cost" to accommodate additional demand from new development or the expansion of existing development. Fees must comply with Propositions 26 and 218. They cannot be arbitrarily reduced or increased without a nexus to development needs. State and local government may expend public funds to achieve goals such as facilitating affordable housing solutions, so long as the expenditure is rationally related to a legitimate government interest, does not constitute a gift of public funds, and complies with Propositions 218 and 26.

Furthermore, shifting the burden of new development participation fees to existing customers via the monthly service charge would be a violation of Prop 218. Article XIII of the California State Constitution (Proposition 218) requires the following conditions:

1. An agency cannot collect revenue beyond what is necessary to provide service.
2. Revenues derived from the fee shall not be used for any other purpose other than that for which the charge was imposed.
3. The amount of the fee may not exceed the proportional cost-of-service for the parcel.
4. No fee may be imposed for a service unless that service is actually used or immediately available to the owner of a property.

Can the District finance new development through the issuance of debt and spread the burden to all customers?

This would violate the tenant, "Development Pays for Development" by shifting the burden to existing customers via a continuing debt repayment. In many ways, this would violate not only Article XIII of the California State Constitution (Proposition 218) and Government Code §66,000 (the Mitigation Fee Act) but also Prop 26.

The District can secure debt to pay for needed replacements and rehabilitation of the sewage collection system. Debt issuance would be in concert with the District's existing pay-as-you-go (paygo) financing for replacement and rehabilitation of the system.

Has the District Considered Varying Participation Charges for Residential Uses?

The South Placer Wastewater Authority is currently conducting an EDU analysis of the various residential sewer uses and their impacts on the sewer system. In addition, the District has been asked to consider a Participation Charge based upon the square footage of the unit, fixture unit analysis, or the number of persons per household (PPH).

Based on the most recent data available which does not include the SPWA EDU Analysis, there are compelling reasons that make it problematic for the District to accommodate this request:

The District studies have shown that while MFR's average daily discharge may be lower, the peak hourly discharge of MFR is 34% higher than SFR. Also, the strength of flow (measured using biological, chemical, and solids components of flow) of MFR is 40% higher than SFR.

Since most MFRs are typically smaller in square footage than SFRs, there does not appear to be a justification for reducing the participation charge based on housing size. Ensuring that sewer collection and treatment facilities are sized to handle peak discharges and strength of flow is one of the many efforts the District implements to comply with the State General Waste Discharge Requirements for Sanitary Sewer Systems, Water Quality Order (Order 2022-0103-DWQ).

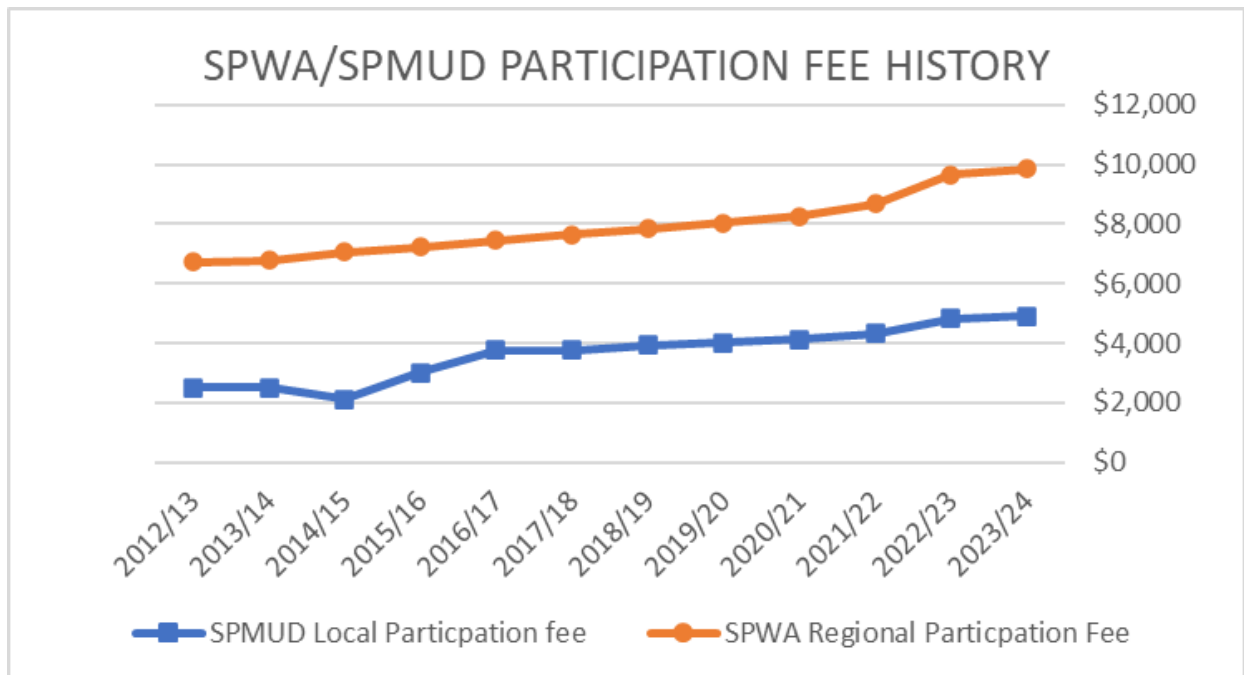
All three partners of the SPWA (the City of Roseville, the County of Placer, and the District) have been calculating participation charges in a similar manner for decades. If the District lowers fees for one class of users, we must raise fees for others. This would require extensive analysis of the impact and fairness of the charge and public hearings at which these findings could be challenged.

SPWA has built a funding mechanism to ensure its fiduciary responsibility to not only the partnering agencies but also the bondholders who have financed regional improvements serving the District in reliance on the established Participation Charge methodology. Altering the fee structure would undermine that obligation and could trigger a violation of bond covenants.

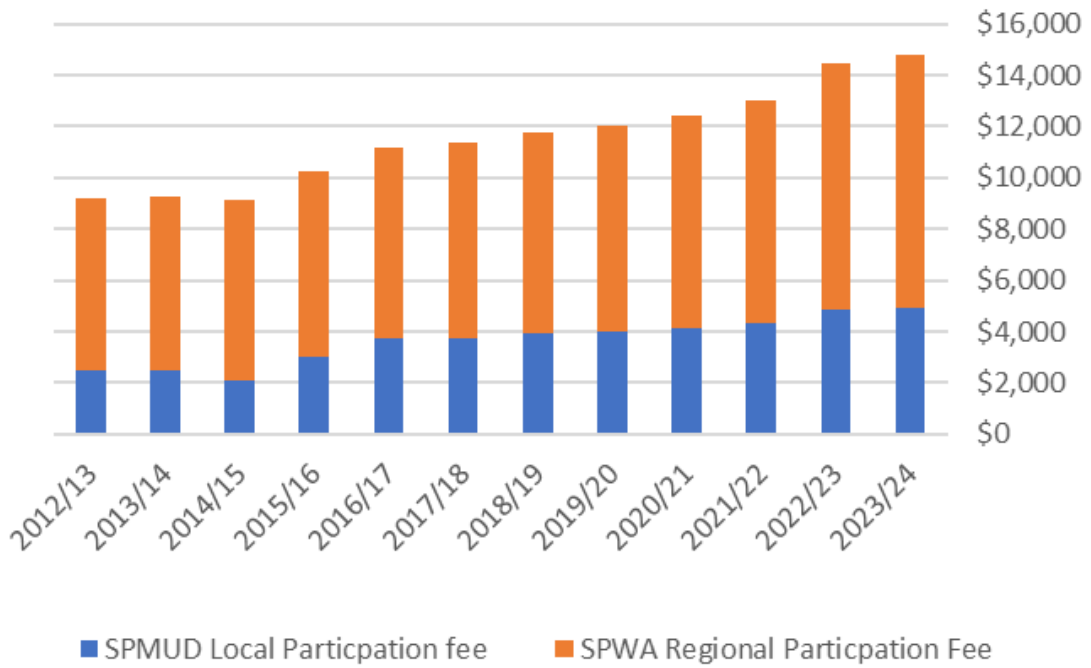
While the proposal for a Participation Charge for MFR based upon the square footage, fixture unit analysis, or PPH addresses emerging changes in housing, the proposal would not be able to reflect the variability in PPH per square footage and the lowering of some EDU assessments. Nor is such a change in assessment methods warranted by prior District studies. In addition, in order for the change to be a “zero-sum game,” in which revenue remains constant, the use of square footage, fixture unit analysis, or PPH in the determination of the Participation Charge would require the increase in assessment for other housing types. This would also place a huge ongoing administrative burden on the District to confirm the housing data and fairly apply the fees.

Attachment 1:
SPMUD (Local) & SPWA (Regional) Participation Charge History 2012-2024

Year	SPMUD Local Participation fee	% change over previous year	Authorization	SPWA Regional Participation Fee	% change over previous year	Authorization
2023/24	\$ 4,915	2%	Ord 23-02	\$ 9,852	2%	SPWA Res 2008-01
2022/23	\$ 4,827	11%	Res 22-22	\$ 9,664	11%	"
2021/22	\$ 4,330	5%	Res 21-19	\$ 8,669	5%	"
2020/21	\$ 4,129	3%	Res 20-18, Res 20-07	\$ 8,267	3%	"
2019/20	\$ 4,014	2%	Res 19-14	\$ 8,037	2%	"
2018/19	\$ 3,923	5%	Res 18-21	\$ 7,854	3%	"
2017/18	\$ 3,750	0%	Ord 17-03, Res 17-16	\$ 7,634	2%	"
2016/17	\$ 3,750	25%	Res 16-13	\$ 7,457	3%	"
2015/16	\$ 3,000	43%	Ord 15-02, Res 15-17	\$ 7,232	2%	"
2014/15	\$ 2,100	-16%	Res 14-01	\$ 7,057	4%	"
2013/14	\$ 2,500	0%	Ord 09-04	\$ 6,787	1%	"
2012/13	\$ 2,500		Ord 09-04	\$ 6,711		"



SPWA/SPMUD PARTICIPATION FEE HISTORY



**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STAFF REPORT**

To: Board of Directors
From: Herb Niederberger, General Manager
Cc: Emilie Costan, Administrative Services Manager
Subject: **Approval of General Manager’s Goals for 2024**
Meeting Date: January 04, 2024

Overview

The Board has requested that the General Manager’s goals for the upcoming year be reviewed. Listed below are goals for 2024, along with a list of long-term agenda items programmed for 2024. These items were reviewed by the President’s Committee on December 20, 2023, and are being forwarded to the Board for discussion and approval.

GENERAL MANAGER GOALS FOR 2024

- Address the 2023 Financial Statement comment regarding unapplied credits by negotiating the restructuring of the billings for Del Oro HS and Sierra College
- Transfer those assets south of Highway 65 to the City of Roseville
- Transfer the Rogersdale assets to the County of Placer
- Manage the recruitment of a new General Manager

3 Months

1. Initiate discussions with Placer Union HS (Del Oro) and Sierra College for rate reconstruction
2. Initiate discussion with City of Roseville for transfer of sewer trunk within City Limits
3. Initiate discussion with Placer County to transfer Rogersdale Service Area to the County SMD 2

6 Months

1. Solicit RFPs for Recruitment Firm – GM Recruitment
2. Execute Agreements with Placer Union HS (Del Oro) and Sierra College for rate reconstruction
3. Engage Placer Couty LAFCO in Rogersdale transfer

9 Months

1. LAFCO approval of Rogersdale transfer
2. Execute agreement with City of Roseville for transfer of sewer trunk within City Limits
3. GM Recruitment

1. Oversee Interviews
2. Hire by 12/1/2024
4. Obtain GFOA Certification of Award (COA) for Excellence in Financial Reporting
5. Obtain GFOA Distinguished Budget Presentation Award

12 Months

1. Retire effective 12/31/2024

Programmed 2024 Agenda Items:

January

- President Change-over, Dissolution of Advisory Committees
- Selection of Officers
- Appointments to Advisory Committee and SPWA Board
- Approve GM 2024 Goals

February

- Mid-Year Budget Adjustments
- Report on SPWA Board Meeting
- Quarterly Investment Report

March

- Award Janitorial Services Contract

May

- Quarterly Investment Report
- Consolidation of Election with Placer County

June

- FY 2024/25 Budget Workshop
- Adopt FY 2024/25 Fee Schedule
- Delinquent Account Assignment

July

- Adopt FY 2024/25 Budget
- Report on SPWA Board Meeting

August

- Quarterly Investment Report
- OPEB Funding Update

September

- Strategic Plan Annual Report
- SSMP update

November

- Quarterly Investment Report
- Annual Investment Report

December

- Final Audit and Consolidated Annual Financial Report FY 2023/24
- Participation Charge Report for FY 2023/24

Recommendation

The General Manager requests that the Board of Directors review, comment, edit, and approve the list of 2024 Goals and Programmed Items and return them to the General Manager for implementation.

Strategic Plan Goals

The General Manager's goals for 2024 are in accordance with the District's Strategic Plan Priorities.

Related District Ordinances or Policies

Policy 4041 – Delegation to the General Manager

Policy 4042 – Board-General Manager Relationship and Responsibilities

Fiscal Impact

The specific fiscal impact associated with these actions will be addressed at the time of project approval or budget.

GENERAL MANAGER REPORT

To: Board of Directors
From: Herb Niederberger, GM
Date: January 4, 2024
Subject: General Manager Monthly Staff Report – December 2023

1) DEPARTMENT REPORTS

Attached are the monthly status reports for the Board’s information:

- A. Administrative Services Department,
- B. Field Services Department, and
- C. Technical Services Department.

The Department Managers are prepared to answer any questions from the Board.

2) INFORMATION ITEMS

- A. On December 1, 2023, the General Manager met with District General Counsel to discuss the following: a) pending litigation regarding sewer service at 2325 Taylor Road; b) USA Properties, College Park Fee Deferral proposal; and c) Unapplied Credits/Need to revise Service Agreements for Sierra College and Del Oro High School
- B. On December 4, 2023, the General Manager, District Engineer, Carie Huff, and District Superintendent, Eric Nielsen, participated in a Microsoft Teams virtual meeting with representatives of Water Works Engineers, to discuss the status of the design of the Johnson Springview Park/Sunset Whitney Recreation Area sewer pipe creek crossing that included a) Summary of Field Site Reconnaissance; b) Spot Survey and Lidar Analysis; c) 100-year Flood, Base Flood Elevation and Impacts of these on Bridge Design; d) Layout of Pipe Alternatives and Bridge Alternatives; and e) Environmental Findings and Impacts on Project Feasibility, Costs and Schedule.
- C. On December 7, 2023, the General Manager and Administrative Services Manager, Emilie Costan, participated in a Zoom Meeting with a representative of SageView Advisory Group to discuss the possibility of opening an additional IRS 457 deferred compensation account option.
- D. On December 13, 2023, the General Manager along with Director Jewell attended the Loomis and Auburn Chamber of Commerce Joint Economic Development & Government Affairs Meeting to hear a presentation from California's Newest Appointed State Fire Marshall, Daniel Berlant.

- E. On December 14, 2023, the General Manager and Administrative Services Manager, Emilie Costan, participated in a Zoom Meeting with a representative of Nationwide to discuss the possibility of opening an additional IRS 457 deferred compensation account option.
- F. On December 20, 2023, the General Manager met with President Williams and Vice-President Durfee to go over the annual goals for the General Manager and the programmed agenda items for 2024.
- G. On December 21, 2023, the General Manager attended a webinar “Mastering Grant Writing for Urban Forestry, Ecosystem Restoration, & Wetland Improvement Projects” presented by the Davey Resource Group.
- H. Also on December 21, 2023, the General Manager along with Director Mitchell, attended the District’s Holiday Team Building Lunch.
- I. Advisory Committee Meetings:
 - i. On December 6, 2023, the Fee and Finance Advisory Committee, along with the General Manager, and District Engineer, Carie Huff, met with representatives of USA Properties to discuss a fee deferral proposal for the College Park Senior Housing Project. The pro forma was based upon inaccurate assumptions. The project proponent agreed to revisit the timing and payments for the project.
 - ii. On December 14, 2023, the General Manager joined Directors Dickinson and Mitchell in a 2x2 meeting with representatives from the City of Rocklin to discuss a) Status of Johnson Spring View Park-Sunset Whitney Recreation Area Pipeline Crossing and Bridge; b) Status of the City’s acquisition of sewer easements for Northwest Rocklin Trunk Sewer/Atherton Trunk; and c) Status of the District’s Participation Fee.

3) PURCHASE ORDERS/CONTRACTS INITIATED UNDER GENERAL MANAGER AUTHORITY

PO Req#	Date	Vendor	Description	Amount
383	12/08/23	California Surveying and Drafting Supply	Radio Detection Cable & Pipe Locator	\$11,541.17
384	12/11/23	SwiftComply.	FOG Management Software	\$6,135
385	12/14/23	TRC Companies	Del Rio/Del Mar Environmental Services	\$19,510
386	12/22/23	Wolf Creek Portable Piping	300 LF Bypass Pump Discharge Piping	\$15,540.99

4) **LONG RANGE AGENDA**

February 2024

- Quarterly Investment Report
- Mid-Year Budget Adjustments
- Report on SPWA Board Meeting

March 2024

- Award Janitorial Services Contract

May 2024

- Quarterly Investment Report
- Consolidation of Election with Placer County

June 2024

- FY 2024/25 Budget Workshop
- Adopt FY 2024/25 Fee Schedule
- Delinquent Account Assignment

July 2024

- Adopt FY 2024/25 Budget
- Report on SPWA Board Meeting

ITEM VIII. ASD REPORT

To: Board of Directors

From: Emilie Costan, Administrative Services Manager

cc: Herb Niederberger, General Manager

Subject: Administrative Services Department Monthly Report

Board Date: January 4, 2024

FY23/24 Mid-Year Budget Adjustments

The Administrative Services Manager has begun working on the Fiscal Year 2023/2024 Mid-Year Budget Adjustments. The proposed adjustments will be presented at the February Board meeting.

457 Providers

The Administrative Services Manager is continuing to meet with 457 and 401 service providers to better understand the cost and service structures, fund choices, and the best overall options available for District participants.

Application of the Certificate of Achievement in Financial Reporting

The Administrative Services Manager submitted the Fiscal Year 2022/2023 Annual Comprehensive Financial Report to the Government Financial Officers Association for consideration for the Certificate of Achievement in Financial Reporting.

Unclaimed Property Letters

In accordance with Board Policy 3175, unclaimed property letters were mailed to 25 customers with unclaimed balances on inactive accounts that are over two years old. The unclaimed property page on the District website was updated to include all unclaimed balances.

Labor & Employment Law Update

The Administrative Services Manager attended a Webinar on December 5th presented by law firm BB&K on annual labor and employment law changes. The webinar went over changes to wage and hour requirements, reproductive loss leave, the new requirement for a Workplace Violence Prevention Plan, benefit changes, and several other new requirements and legal cases impacting labor and employment.

Year-End & 2024 Payroll Updates

The Administrative Services Manager attended a Webinar on December 8th presented by CalCPA called Payroll: Wrapping up 2023 with an Eye Toward 2024. The webinar reviewed changes to wage bases, annual limits, deductions, and thresholds. The presenters shared 2024 increases for Federal Unemployment Insurance and State Disability Insurance, changes to California paid sick leave, reporting of holiday fringe benefits, and new CA laws impacting employee pay.

December Monthly Investment Transactions per GC §53607

DEPOSITS, TRANSFERS, OR WITHDRAWALS

CalTRUST:	None
CA CLASS:	Deposit of \$5M
LAIF:	None
Placer County:	Withdrawal of \$5M
Five Star MM:	Transfer \$300,000 to Cash

ITEM VII. FSD REPORT

To: Board of Directors
From: Eric Nielsen, Superintendent
Cc: Herb Niederberger, General Manager
Subject: Field Services Department Monthly Report
Meeting Date: January 4, 2024

Department Overview

This section provides the Board an update on the news and major tasks from the Field Services Department (FSD).

- 1. Training/Break Room Addition, Locker Room, and Lobby Improvements**
 - a. Work on the project was substantially complete in November and passed the final City of Rocklin inspection in December.
 - b. The Notice of Completion for the project is being presented to the Board for its review and approval at the January Board Meeting.

- 2. Supervisory Control and Data Acquisition (SCADA) Replacement**
 - a. The in-field radio path testing was completed the week of December 4.
 - b. The design team is moving forward with 60% plans.

- 3. Taylor Road Lift Station Damage Repair**
 - a. District staff is preparing the final invoice to send to the contractor who damaged the District's power pole, conduit, and wiring for reimbursement.

- 4. SPWA Partners Operations Meeting**
 - a. The District hosted representatives from the County of Placer and City of Roseville operations and engineering groups on November 30. This meeting occurs three times every year and provides an opportunity for the operations and engineering groups to coordinate, share, innovate, and plan. The group discussed many topics including mutual aid agreements and verification of points of connection between the three agencies.

- 5. Pesticide Use Permit**
 - a. District staff met with staff from the County of Placer Department of Agriculture to review and renew the District Pesticide Use Permit for 2024. This permit allows the District to apply herbicide to easement roads and root foam lower laterals.

6. Tree Removal

- a. District staff met with a representative from Tree Pro Services, Inc. to develop the scope for the removal of trees within District easements.

7. Regulatory Updates and Professional Development

- a. The District Superintendent attended several 1-2 hour webinars during the month which are listed below.
 - i. California Air Resources Board (CARB) webinar on the Advanced Clean Fleet (ACF) Rule contracting requirements.
 - ii. ITpipes webinar on enhancements to its CCTV software used by the District.
 - iii. Lucity/CentralSquare webinar on optional asset management tools compatible with its software.

Reporting

This section provides the Board an overview of the Field Services Department operations and maintenance activities through 11/30/2023. The work listed is not all inclusive.

1. Lost Time Accidents/Injuries (OSHA 300)

- a. Zero (0)
 - i. 2648 days (7.3 years) without a Lost Time Accident/Injury

2. Safety/Training/Professional Development

- a. Field Services employees participated in training for the following:
 - i. Defensive Driving Series
 - ii. Respirable Silica Safety and Awareness Training

3. Customer Service Calls

- a. Response Time Goals over the Last 12 Months

	Goal	Average	Success Rate
During Business Hours	< 30 minutes	19 min	97%
During Non-Business Hours	< 60 minutes	44 min	

Service Calls - November

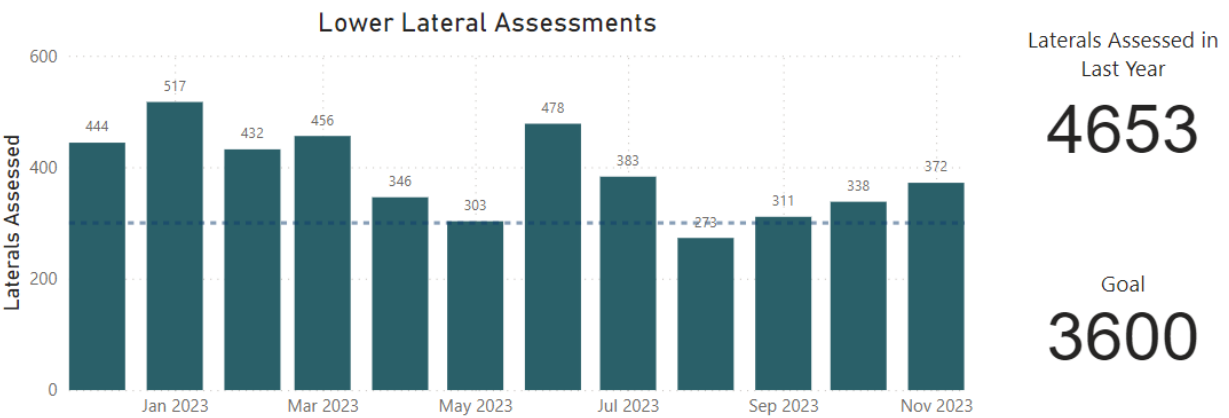
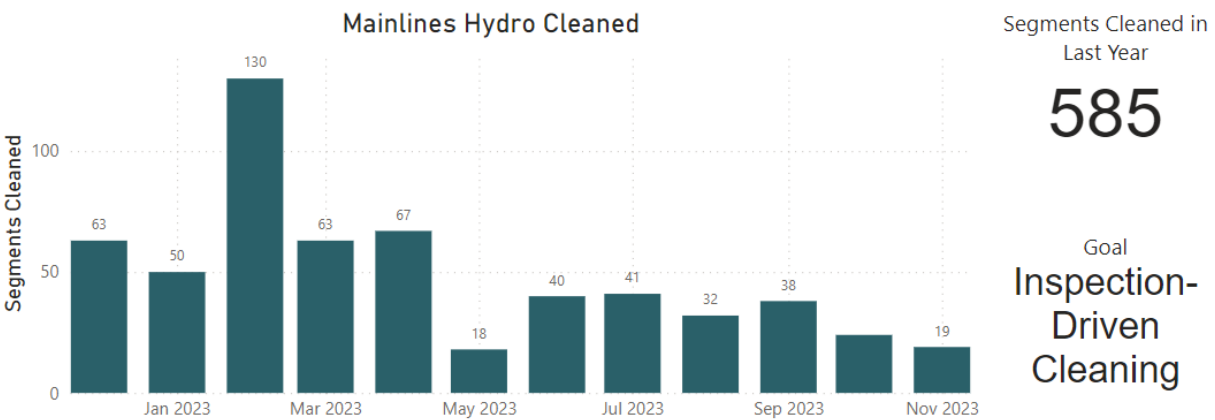
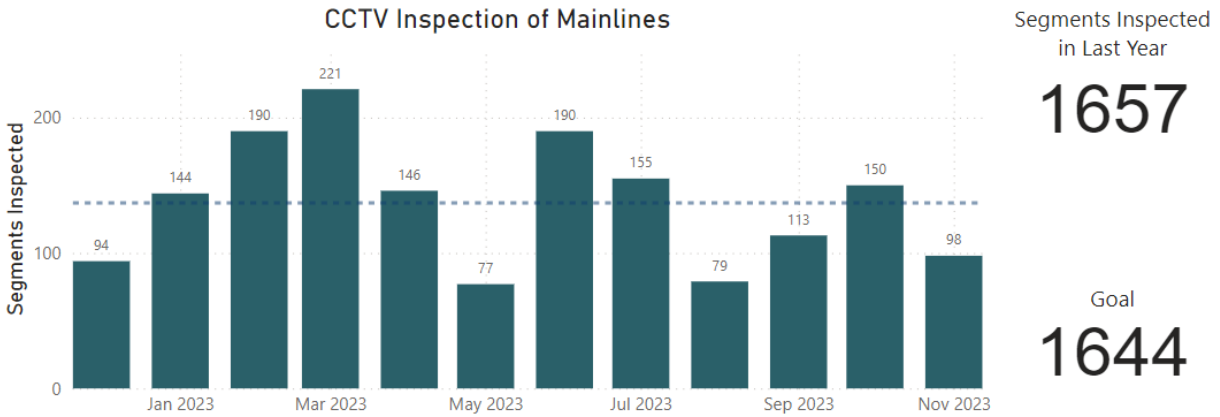
Responsibility	Spill	Stoppage	Odor	Alarm	PLSD	Vermin	Misc
SPMUD Responsibility	2	2	1	1			
Owner Responsibility		1	1		5		1
N/A			1				1
Total	2	3	3	1	5		2

Total Service Calls

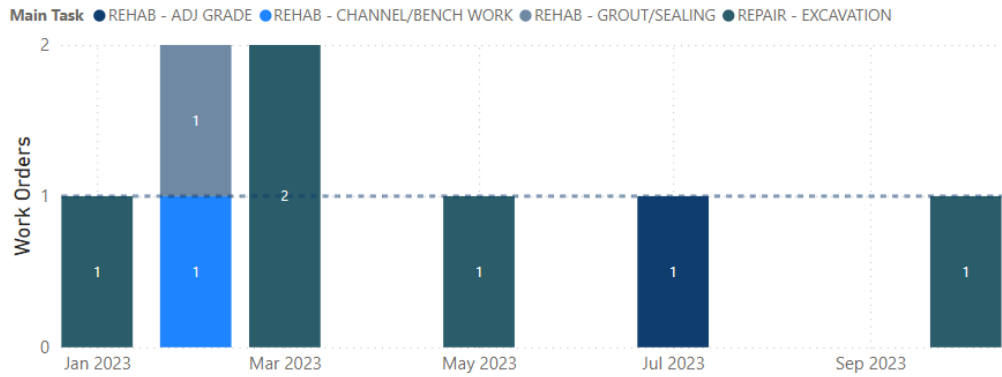
16

4. Production

- a. The information provided below shows the work performed in key areas of focus. It does not represent all the work completed in the department.



Sewer Main & Manhole Rehabilitation & Repair

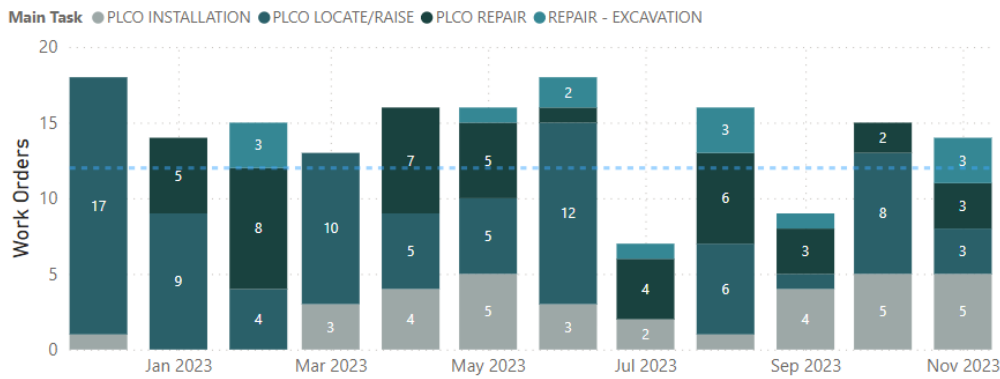


Assets Repaired in Last Year

8

Goal
12

Improved Lateral Access

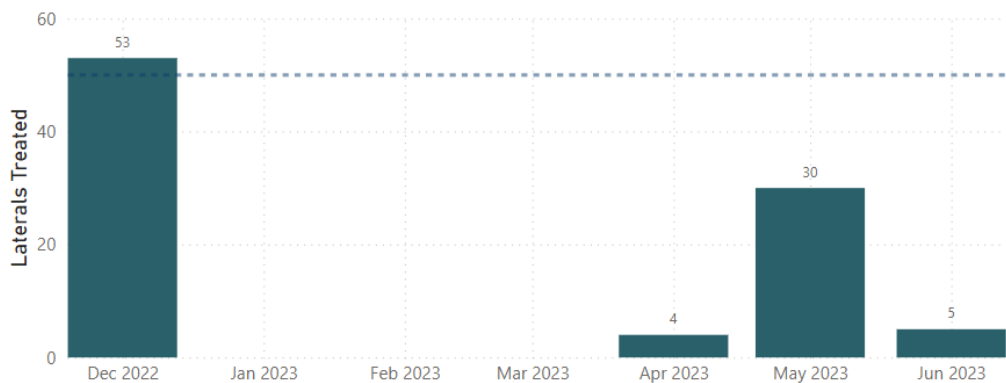


PLCOs Installed in Last Year

171

Goal
144

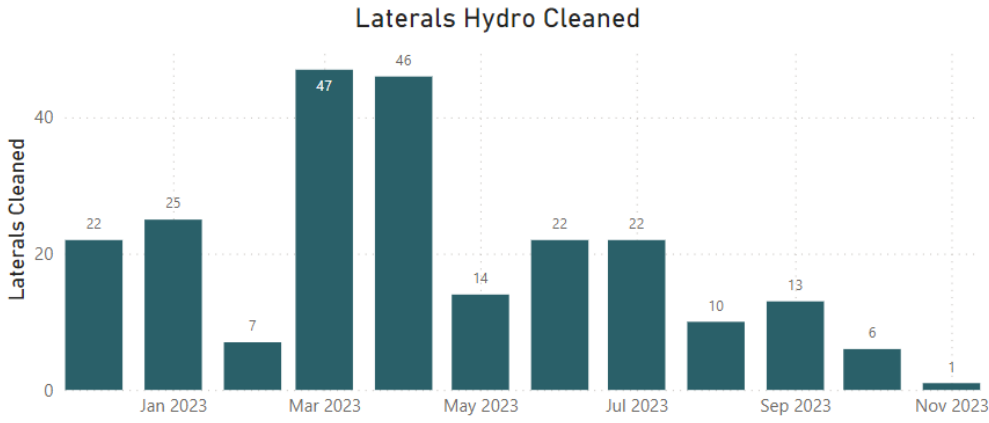
Lateral Chemical Root Treatment



Laterals Treated in Last Year

92

Goal
600



Laterals Cleaned in
Last Year

235

Goal
**Inspection-
Driven
Cleaning**

ITEM VII. TSD REPORT

To: Board of Directors
From: Carie Huff, District Engineer
Cc: Herb Niederberger, General Manager
Subject: Technical Services Department Monthly Report
Board Date: January 4, 2024

TSD Updates:

- ❖ TSD staff attended biennial CPR Training on December 7th.
- ❖ TSD staff participated in the EEC meeting on December 12th to plan the holiday team-building event.
- ❖ The District Engineer attended the Exceptional Leader class on December 11, 12, and 13 through CPS HR.
- ❖ The District Engineer participated in the Rocklin 2x2 meeting to discuss the Johnson Springview Creek Crossing, Northwest Rocklin Sewer Annexation Construction easement acquisition, College Park Senior Apartments, and rates and fees.
- ❖ The repairs at the Taylor Road Lift Station associated with the damage caused by a Caltrans contractor are complete. The District will be submitting the costs of the pole and conduit repair, generator rental, fueling costs, and staff time as part of the claim.
- ❖ The second quarter commercial audit of FY2023/24 is complete.
- ❖ TSD staff is working on updates to the District's Standard Specifications and Improvement Standards for Sanitary Sewer to align with the Sewer Code updates and to Chapter 4 – Wastewater Pump Stations. Updates to the Wastewater Pump Station standards are anticipated in the Spring of 2024.

Northwest Rocklin Sewer Annexation Construction Project (formerly known as Atherton Trunk)

There is no update on the City's acquisition of easements, which is the last remaining item for project acceptance.

Sierra College Trunk and Lift Station Abandonment, Rocklin

TSD staff is coordinating access with property owners to complete a preliminary survey in early 2024.

Cameo Court Trunk and Lift Station Abandonment, Rocklin

WaterWorks Engineers completed the preliminary survey, and they are working on potential alignments.

PCWA / Newcastle Construction Cooperation Project

GHD is in the process of completing the final design. The District Engineer, PCWA, and GHD met onsite with a property owner to discuss the project scope. Additional meetings will be required as the design is finalized.

Jack in the Box Sewer Replacement Project

Uhora is moving forward with the design.

Del Rio Court and Delmar Sewer Extension Project

Staff is reviewing the final improvement plans and specifications and anticipates that the project will go to bid in January with an award in April 2024.

Johnson Springview Park Creek Crossing, Rocklin

As previously shared in last month's TSD report, WaterWorks Engineers and their subconsultant, Helix Environmental Planning, completed preliminary biological and cultural resource field surveys and records searches for the project. The preliminary results indicate close proximity to sensitive tribal resources and that this segment of Antelope Creek is identified as an essential fish habitat for listed salmonids. These findings along with preliminary cost estimates were shared with the City of Rocklin at the recent 2x2 meeting. Further coordination and refinement of the project will occur in the next few weeks to be presented to the board for consideration.

Taylor Road Crossing, Newcastle

The survey is complete and design is underway.

Main Street, Newcastle

The survey is complete and design is underway.

Newcastle Data Collection

The data collection in Newcastle is ongoing with anticipated completion in April.

Farron Street Sewer Trunk Replacement

TSD staff is currently working on the contract documents to release for bidding.

Proposed Annexation of the Castle City Mobile Home Park in Newcastle

The District has been preparing documentation for Coleman Engineering to submit as part of the funding application to the state of California.

Local Agency Formation Commission (LAFCO)

The District reviewed LAFCO's Request for Proposals for the Municipal Services Review and Sphere of Influence Study. Proposals are due on January 15th.

FOG Program

The District's FOG Inspector completed three core sample inspections of grease control devices (GCD) in November. The core sample inspections occurred at 5400, 5406, and 5410 Crossings Drive. All three grease control devices were found to be in satisfactory condition, and the core sample readings were within compliance. In addition, a new hydro-mechanical GCD for Paquita's Mexican Grill (formerly Lorenzo's in Loomis) has been installed and a rough inspection has been approved. In addition, the interior grease lines were replaced due to age and poor condition.

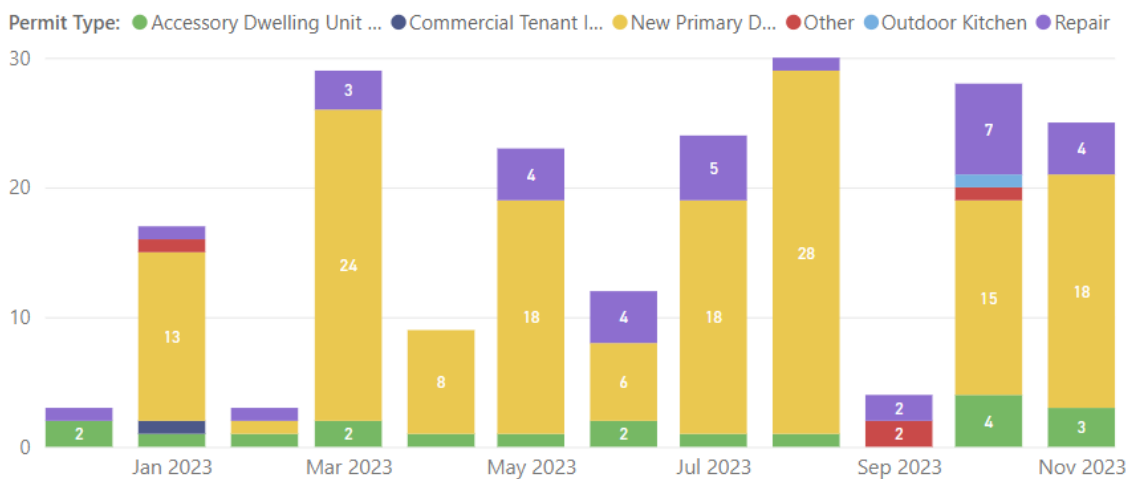
Industrial Pretreatment

District staff continues to coordinate with the City of Roseville’s Industrial Waste Department regarding the Industrial Pretreatment Program. The City provided a draft Brewery Characterization Study for the District’s review.

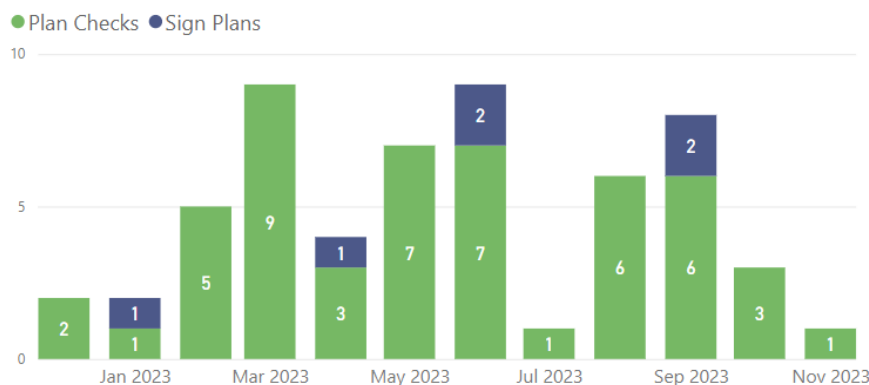
Department Performance Indicators

The following charts depict the efforts and performance of the department in the following areas of work as of November 30, 2023. The charts are being created in a new reporting tool that directly connects to the District’s data, improving the timeliness of reporting efforts and leveraging the District’s investment in technology. Additional charts may be added in the future for other areas of work in the department.

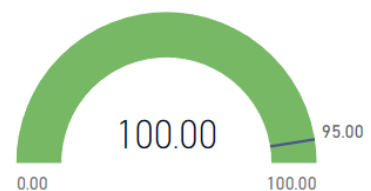
Sewer Permits - Completed - Monthly Totals



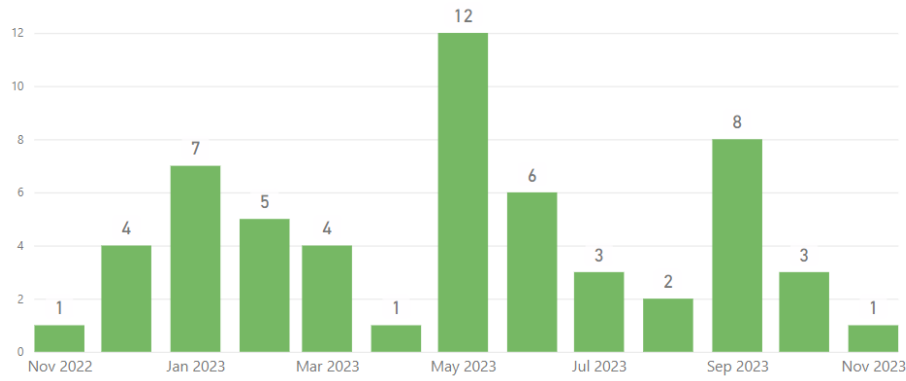
Plan Checks Completed - Monthly Totals



% "In Time" Plan Checks



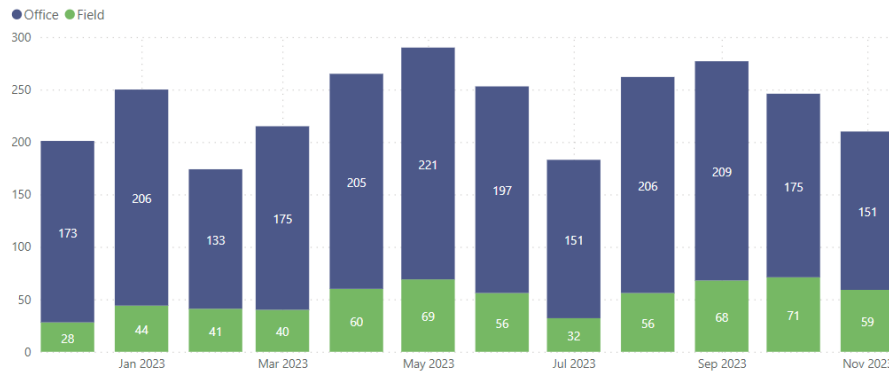
Tenant Improvement Reviews Completed - Monthly Totals



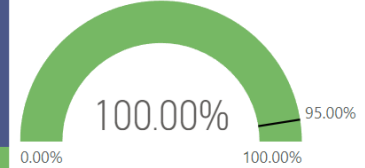
% "In Time" Tenant Improvements



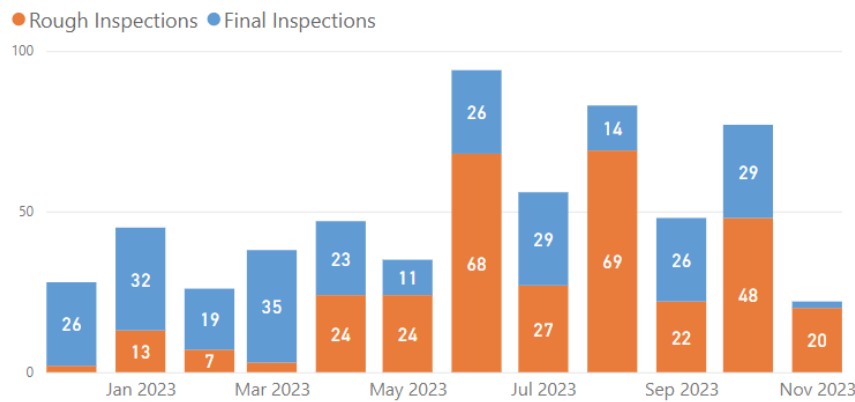
811 Responses



% "In Time" Responses



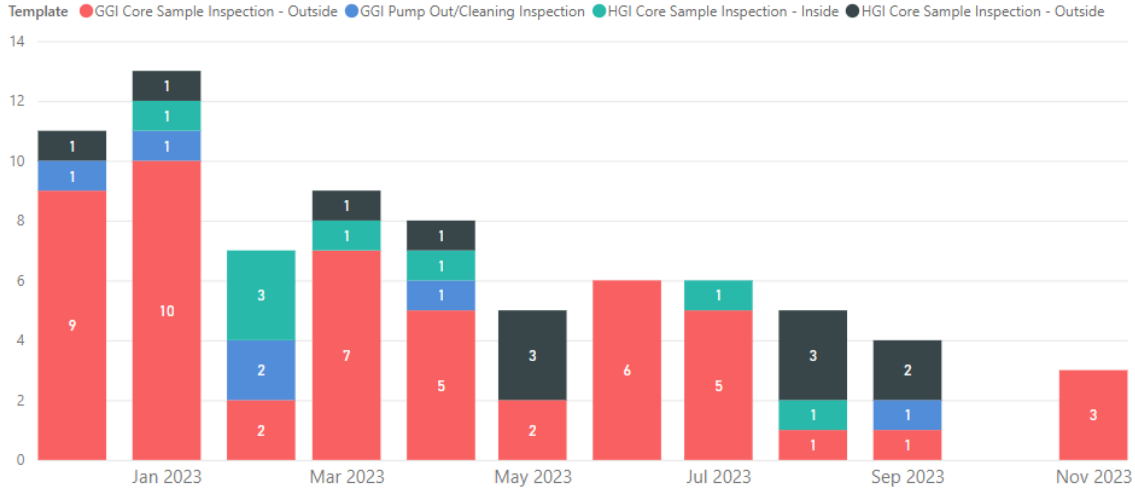
Building Sewer Inspections - Monthly Totals



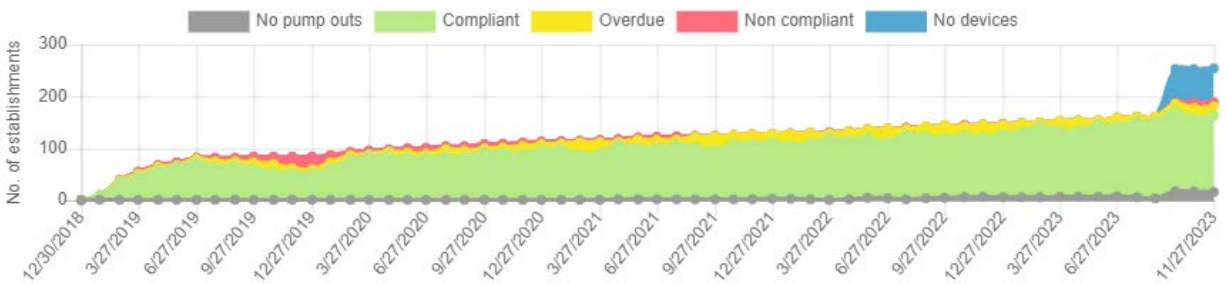
% "In Time" Inspections



Grease Interceptor Inspections



FOG Compliance History



SwiftComply updated the program to include facilities that do not have a grease control device. This blue area indicates food service establishments that either have no devices or have not been investigated or inspected yet.

FOG Pickups - Monthly Totals

