

**ENGINEER'S REPORT
CALAVERAS ESTATES UNIT NO. 4 - ZONE 14
CITY OF STOCKTON
STOCKTON CONSOLIDATED STORM DRAINAGE
MAINTENANCE ASSESSMENT DISTRICT No. 2005-1
(PURSUANT TO THE MUNICIPAL IMPROVEMENT ACT OF 1913 AND
STOCKTON IMPROVEMENT PROCEDURE CODE, PART V)**

**FISCAL YEAR
2019-2020**

**PREPARED BY:
NORTHSTAR ENGINEERING GROUP, INC.**

JULY 18, 2018

**ENGINEER'S REPORT
FOR THE 2019 – 2020 FISCAL YEAR**

**CALAVERAS ESTATES UNIT NO. 4 - ZONE 14
STOCKTON CONSOLIDATED STORM DRAINAGE MAINTENANCE
ASSESSMENT DISTRICT No. 2005-1**

(Pursuant to the Municipal Improvement Act of 1913 and Stockton Improvement
Procedure Code, Part V)

The undersigned respectfully submits the enclosed annual report as directed by the City Council.



Northstar Engineering Group, Inc.
Engineer of Work

BY: _____

DATED: July 31, 2018

I HEREBY CERTIFY that the enclosed Engineer's Report together with Assessment Roll and Assessment Diagram thereto attached, was filed with me on the _____ day of _____, 2018.

City Clerk, City of Stockton
San Joaquin County, California

BY: _____

I HEREBY CERTIFY that the enclosed Engineer's Report together with Assessment Roll and Assessment Diagram thereto attached, was approved and confirmed by the City Council of the City of Stockton, California on the _____ day of _____, 2018.

City Clerk, City of Stockton
San Joaquin County, California

BY: _____

I HEREBY CERTIFY that the enclosed Engineer's Report together with Assessment Roll and Assessment Diagram thereto attached, was filed with the Auditor of the County of San Joaquin on the _____ day of _____, 2018.

City Clerk, City of Stockton
San Joaquin County, California

BY: _____

July 6, 2018

The Honorable Mayor and
City Council of The City
of Stockton, CA

Ladies and Gentlemen:

This report is prepared pursuant to and in compliance with the requirements of the Municipal Improvement Act of 1913 and Stockton Improvement Procedure Code, Part V, as amended.

BACKGROUND

The Calaveras Estates, Unit No. 4 project is an 8.19-acre 40 lot residential subdivision development in the northeastern portion of the City of Stockton. The development is being pursued by Florsheim Homes. The Calaveras Estates Unit 4 development includes a mechanical storm water filter that will require ongoing maintenance. The filter box and all associated bypass mechanisms are 100% special benefit to these parcels and 0% general benefit as these amenities are located to serve these parcels. This report is relative to the formation of the proposed Zone 14, Calaveras Estates Unit No. 4 of the Stockton Storm Drainage Maintenance Assessment District No. 2005-1 to provide annual funds for the maintenance of the Contech storm water filter and any bypass piping or structures within the boundaries of Zone 14.

ASSESSMENT DISTRICT AREA

The area of Zone 14, Calaveras Estates, Unit No. 4 is described as a portion of the property within the following assessor's parcels identified by assessor's number (APN):

<u>Book</u>	<u>Page</u>	<u>Parcel</u>
115	030	02

The assessment diagrams for Zone 14, Calaveras Estates, Unit No. 4 are attached to the Engineer's Report. Exhibit "A" is the proposed assessment roll; Exhibit "B" is the boundary map; and Exhibit "C" is the assessment diagram.

PLANS AND SPECIFICATIONS

As this project is developed, plans and specifications for the landscaped improvements to be maintained by the funds generated by Zone 14, Calaveras Estates, Unit No. 4 are filed separately with the City of Stockton and are incorporated in this report by reference.

DESCRIPTION OF AREAS TO BE MAINTAINED (SEE EXHIBIT D)

Zone 14, Calaveras Estates, Unit No. 4 is created to provide funding for the continued maintenance of the public improvements, which are described below.

The following improvements shall be included in the District upon their completion. (Also see Exhibit D).

1. Improvements located in Unit No. 4:
 - A. Maintenance of the Contech mechanical storm water filter.

ALLOCATION OF COSTS

Assessments for the Calaveras Estates, Unit No. 4 Storm Drainage Maintenance District are apportioned in a manner intended to fairly distribute the amounts among all assessable developed parcels in proportion to the estimated benefits to be received by each such parcel. A parcel is considered as being developed by reason of having been included as a lot or parcel in Calaveras Estates, Unit No. 4 recorded Final Map or being included within the active developed area in the case of an existing parcel. The criteria for apportioning the costs for the Contech storm water filter maintenance makes use of dwelling unit equivalent Factor (dueF) to calculate the benefit for all uses in terms of equivalent dwelling units. The terms, definitions, and procedures followed to develop the annual assessments are as follows:

1. Dwelling Unit Equivalent Factor (dueF)

The dueF for each use are as follows:

- a. Single-Family Residential

All parcels determined to be developed for single-family use shall have a dueF of 1.0 for each parcel. The subdivision shall have no less than 40 dueF.

2. Area Adjustments

Parcels which have an assessment determined by area and which have a portion of the parcel occupied by public or public utility uses separate from the entitled use and located in easements, prior to the multiplication by the dueF, shall have the area of the parcel adjusted to a usable area to reflect to loss or partial loss of the entitled use in those areas. This reduction shall not apply for normal and interior lot line public utility easements generally existing over the whole subdivision.

3. Compilation

Annually, about May 15, following the determination of the dwelling unit equivalent Factor (dueF) for all developed parcels and the determination of the list of developed parcels by APN for the next fiscal year, all single-family residential parcels shall have a dwelling unit equivalent (due) assigned to each parcel equal to the dueF for that parcel. For developed and undeveloped parcels, the sum of the due assigned to each single-family due for each other

parcels shall equal the total due for the next fiscal year. The total amount of revenue required for the next fiscal year shall then be divided by the total due to calculate the assessment per due for the next fiscal year.

4. Allocation of Assessments

The assessment for storm drainage maintenance for the next fiscal year shall then be set for each parcel as the product of the calculated dwelling unit equivalent (due) for each parcel multiplied by the assessment per due for the next fiscal year.

METHOD OF ASSESSMENT SPREAD

In compliance with the provisions of Proposition 218, adding Article XIII D to the California Constitution, the benefits conferred on each parcel within the Stockton Storm Drainage Maintenance Assessment District No. 2005-1 are particular and distinct benefits (hereinafter "special benefits") over and above general benefits conferred on such property or to the public at large, in that the individual letter designated zones in the District each represents a common unit to provide landscape, park, and related amenity maintenance, monitored irrigation, maintenance of wall for privacy and traffic noise reduction to the individual lots or parcels which maintenance and irrigation is required for the development of the property within the individual letter designated zones in the District generally for residential and related urban uses. Benefits are determined to be 100% special benefits and 0% general benefits. Also, in keeping with the requirements of Proposition 218, no annual individual assessments shall be increased above the amounts assessed under the established criteria for each Zone for the proceeding fiscal year without an election approval.

The base objective of the assessment spread is to distribute costs in accordance with the benefits received. Costs will be spread equally to each residential lot as follows:

Lots 1-40 in Unit No. 4, shall be assessed equally for the estimated costs of maintenance for each fiscal year.

ANNUAL ESCALATOR

The maximum assessment amount for each fiscal year shall be increased in amount equal to the greater of:

1) Three percent (3.0%);

OR

2) The percentage increase in of the Local Consumer Price Index (CPI). Consumer Price Index applied is for the San Francisco-Oakland-San Jose County Area for All Urban

Consumers, as developed by U.S. Bureau of Labor Statistics for a similar period of time.

ADMINISTRATION

It is intended that the City of Stockton, either directly or by subcontract, shall have the responsibility to establish an ongoing Storm Drainage Maintenance Management entity to be known as The Storm Drainage Maintenance District Manager which shall be responsible to establish the annual budget, keep an accounting of the maintenance and operational administrative costs, administer and perform the storm drainage maintenance either directly or by subcontract, pay all fees, utility costs, taxes and any and all other operating costs.

ESTIMATE OF COSTS

The estimated costs are for maintenance of the Contech mechanical stormwater filter only. The developer will install the mechanical filter at no cost to the Storm Drainage Maintenance Assessment District. The improvements will be maintained by the Developer until June 30, the start of the next fiscal year, and thereafter by the Storm Drainage Maintenance District. If there are not sufficient funds in Zone 14 on June 30, the developer shall continue to maintain the improvements until sufficient revenue has been generated by Zone 14 to fund the maintenance. Items considered in the maintenance cost include, but are not limited to: maintenance of the mechanical filter. The supplier of the mechanical device has stated that no replacement will be necessary, so we have not included any cost of replacement of the unit.

The annual costs estimated to be collected with the 2019-2020 taxes for the developed areas are as follows:

ZONE 14, CALAVERAS ESTATES UNIT 4 ANNEXATION

BUDGET PROJECTIONS/ESTIMATES

OPERATION COSTS

Contech mechanical storm water filter	
Yearly Cleaning & Inspection	\$ 3,450.00 per year
Material Handling Fee	\$ 450.00 per year
Maintenance – replace 31 filters every 3 years	\$ 3,875.00 per year
StormVault Replacement Cost – Every 75 years	\$ 1,093.34 per year

Estimated Total Operation Costs **\$ 8,868.34**

DISTRICT ADMINISTRATION COSTS

Annual Engineer's Report	\$ 1,600.00
Publication	\$ 68.00
Attorneys' Fee	\$ 750.00
City Administration Fee	\$ 5,000.00
County Administration Fee	\$ 120.00

Estimated Total Administration Costs \$ 7,538.00

TOTAL MAXIMUM ESTIMATED REVENUE REQUIRED ANNUALLY \$16,406.34
 TOTAL APPROPRIATION REQUIRED FROM EXISTING FUND BALANCE \$ 0.00
 TOTAL MAXIMUM ANNUAL ASSESSMENT \$16,406.34

Total due 40
 Maximum Annual Assessment per due \$ 410.16
 Maximum Assessment \$ 410.16

Maximum Annual Assessment per Parcel
 APN 115-030-02 \$16,406.34

ASSESSMENT ROLL

The assessment roll for the proposed annexation to Zone 14 for the fiscal year 2019-2020 is as follows:

Assess- ment No.	APN No.	Future Lot Nos.	Owner	No. of dueF's	Maximum Annual Assessment
1	TBD	Calaveras Estates Unit 4, Lot 1	TBD	1	\$410.16
2	TBD	Calaveras Estates Unit 4, Lot 2	TBD	1	\$410.16
3	TBD	Calaveras Estates Unit 4, Lot 3	TBD	1	\$410.16
4	TBD	Calaveras Estates Unit 4, Lot 4	TBD	1	\$410.16
5	TBD	Calaveras Estates Unit 4, Lot 5	TBD	1	\$410.16
6	TBD	Calaveras Estates Unit 4, Lot 6	TBD	1	\$410.16
7	TBD	Calaveras Estates Unit 4, Lot 7	TBD	1	\$410.16
8	TBD	Calaveras Estates Unit 4, Lot 8	TBD	1	\$410.16
9	TBD	Calaveras Estates Unit 4, Lot 9	TBD	1	\$410.16
10	TBD	Calaveras Estates Unit 4, Lot 10	TBD	1	\$410.16
11	TBD	Calaveras Estates Unit 4, Lot 11	TBD	1	\$410.16
12	TBD	Calaveras Estates Unit 4, Lot 12	TBD	1	\$410.16
13	TBD	Calaveras Estates Unit 4, Lot 13	TBD	1	\$410.16
14	TBD	Calaveras Estates Unit 4, Lot 14	TBD	1	\$410.16
15	TBD	Calaveras Estates Unit 4, Lot 15	TBD	1	\$410.16
16	TBD	Calaveras Estates Unit 4, Lot 16	TBD	1	\$410.16
17	TBD	Calaveras Estates Unit 4, Lot 17	TBD	1	\$410.16
18	TBD	Calaveras Estates Unit 4, Lot 18	TBD	1	\$410.16
19	TBD	Calaveras Estates Unit 4, Lot 19	TBD	1	\$410.16
20	TBD	Calaveras Estates Unit 4, Lot 20	TBD	1	\$410.16
21	TBD	Calaveras Estates Unit 4, Lot 21	TBD	1	\$410.16
22	TBD	Calaveras Estates Unit 4, Lot 22	TBD	1	\$410.16
23	TBD	Calaveras Estates Unit 4, Lot 23	TBD	1	\$410.16
24	TBD	Calaveras Estates Unit 4, Lot 24	TBD	1	\$410.16
25	TBD	Calaveras Estates Unit 4, Lot 25	TBD	1	\$410.16
26	TBD	Calaveras Estates Unit 4, Lot 26	TBD	1	\$410.16
27	TBD	Calaveras Estates Unit 4, Lot 27	TBD	1	\$410.16
28	TBD	Calaveras Estates Unit 4, Lot 28	TBD	1	\$410.16
29	TBD	Calaveras Estates Unit 4, Lot 29	TBD	1	\$410.16
30	TBD	Calaveras Estates Unit 4, Lot 30	TBD	1	\$410.16
31	TBD	Calaveras Estates Unit 4, Lot 31	TBD	1	\$410.16

32	TBD	Calaveras Estates Unit 4, Lot 32	TBD	1	\$410.16
33	TBD	Calaveras Estates Unit 4, Lot 33	TBD	1	\$410.16
34	TBD	Calaveras Estates Unit 4, Lot 34	TBD	1	\$410.16
35	TBD	Calaveras Estates Unit 4, Lot 35	TBD	1	\$410.16
36	TBD	Calaveras Estates Unit 4, Lot 36	TBD	1	\$410.16
37	TBD	Calaveras Estates Unit 4, Lot 37	TBD	1	\$410.16
38	TBD	Calaveras Estates Unit 4, Lot 38	TBD	1	\$410.16
39	TBD	Calaveras Estates Unit 4, Lot 39	TBD	1	\$410.16
40	TBD	Calaveras Estates Unit 4, Lot 40	TBD	1	\$410.16

The parcels in the proposed Calaveras Estates Unit No. 4 are expected to subdivide upon the formation of Zone 14. The proposed subdivision will contain a total of 40 parcels and will have a proposed assessment roll based on the above criteria and budget set forth on Exhibit "A".

This annexation will result in approval of a maximum assessment. The actual 2019-2020 fiscal year levy on developed parcels will be determined at the City's 2019-2020 Annual Stockton Consolidated Storm Drainage Maintenance District 2005-1 budget process.

The foregoing Engineer's Report and the estimate of costs, as well as the Assessment Diagram and Assessment Roll, which are attached hereto, are presented for your approval by resolution dated this _____ day of _____, 2018.



Northstar Engineering Group, Inc.
Engineer of Work

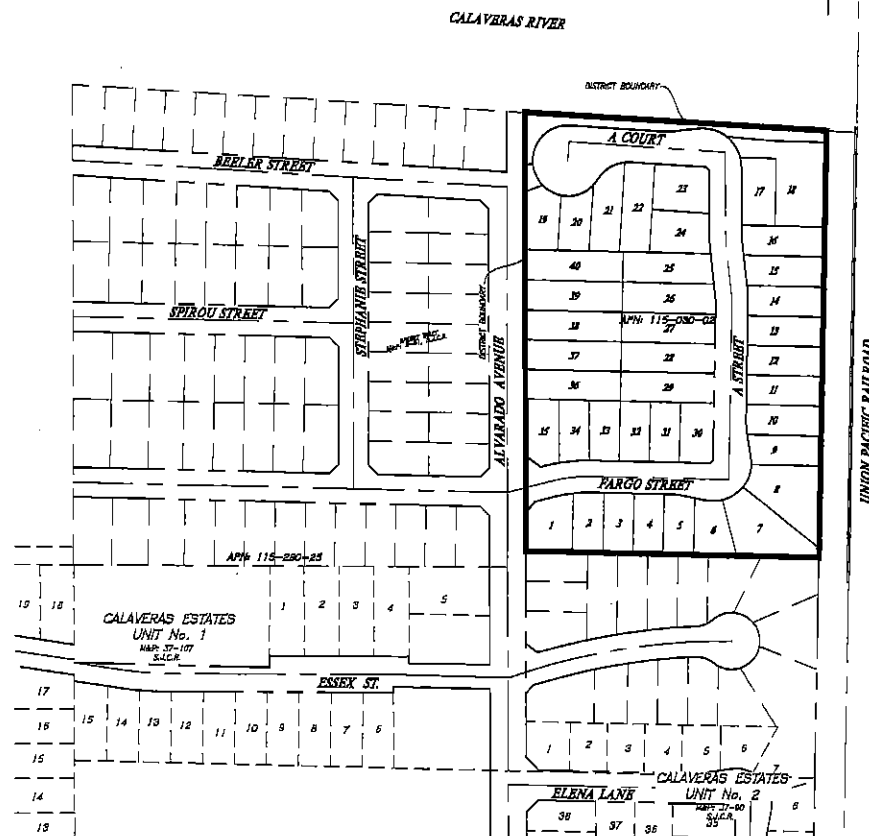
BY: _____

EXHIBIT "A"
PROPOSED ASSESSMENT ROLL
CALAVERAS ESTATES UNIT NO. 4 - ZONE 14
STOCKTON CONSOLIDATED STORM DRAINAGE MAINTENANCE ASSESSMENT
DISTRICT No. 2005-1

ASSESSMENT DIAGRAM NUMBER	COUNTY ASSESSOR NUMBER (APN)	LOT NO. AND UNIT NO.	MAXIMUM ANNUAL ASSESSMENT AMOUNT
1	*115-300-01	Lot 1, Unit No. 4	\$410.16
2	*115-300-01	Lot 2, Unit No. 4	\$410.16
3	*115-300-01	Lot 3, Unit No. 4	\$410.16
4	*115-300-01	Lot 4, Unit No. 4	\$410.16
5	*115-300-01	Lot 5, Unit No. 4	\$410.16
6	*115-300-01	Lot 6, Unit No. 4	\$410.16
7	*115-300-01	Lot 7, Unit No. 4	\$410.16
8	*115-300-01	Lot 8, Unit No. 4	\$410.16
9	*115-300-01	Lot 9, Unit No. 4	\$410.16
10	*115-300-01	Lot 10, Unit No. 4	\$410.16
11	*115-300-01	Lot 11, Unit No. 4	\$410.16
12	*115-300-01	Lot 12, Unit No. 4	\$410.16
13	*115-300-01	Lot 13, Unit No. 4	\$410.16
14	*115-300-01	Lot 14, Unit No. 4	\$410.16
15	*115-300-01	Lot 15, Unit No. 4	\$410.16
16	*115-300-01	Lot 16, Unit No. 4	\$410.16
17	*115-300-01	Lot 17, Unit No. 4	\$410.16
18	*115-300-01	Lot 18, Unit No. 4	\$410.16
19	*115-300-01	Lot 19, Unit No. 4	\$410.16
20	*115-300-01	Lot 20, Unit No. 4	\$410.16
21	*115-300-01	Lot 21, Unit No. 4	\$410.16
22	*115-300-01	Lot 22, Unit No. 4	\$410.16
23	*115-300-01	Lot 23, Unit No. 4	\$410.16
24	*115-300-01	Lot 24, Unit No. 4	\$410.16
25	*115-300-01	Lot 25, Unit No. 4	\$410.16
26	*115-300-01	Lot 26, Unit No. 4	\$410.16
27	*115-300-01	Lot 27, Unit No. 4	\$410.16
28	*115-300-01	Lot 28, Unit No. 4	\$410.16
29	*115-300-01	Lot 29, Unit No. 4	\$410.16

30	*115-300-01	Lot 30, Unit No. 4	\$410.16
31	*115-300-01	Lot 31, Unit No. 4	\$410.16
32	*115-300-01	Lot 32, Unit No. 4	\$410.16
33	*115-300-01	Lot 33, Unit No. 4	\$410.16
34	*115-300-01	Lot 34, Unit No. 4	\$410.16
35	*115-300-01	Lot 35, Unit No. 4	\$410.16
36	*115-300-01	Lot 36, Unit No. 4	\$410.16
37	*115-300-01	Lot 37, Unit No. 4	\$410.16
38	*115-300-01	Lot 38, Unit No. 4	\$410.16
39	*115-300-01	Lot 39, Unit No. 4	\$410.16
40	*115-300-01	Lot 40, Unit No. 4	\$410.16
TOTALS			\$16,406.40

* Final Assessor's Parcel Number to be assigned, once map records.



PROPOSED BOUNDARY MAP

**ZONE 14 OF THE STOCKTON CONSOLIDATED
STORM DRAINAGE MAINTENANCE
ASSESSMENT DISTRICT, NO. 2005-1
FORMED AS
CALAVERAS ESTATES UNIT NO. 4
ASSESSMENT DISTRICT
CITY OF STOCKTON, SAN JOAQUIN COUNTY,
STATE OF CALIFORNIA**

FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY OF
STOCKTON THIS _____ DAY OF _____.

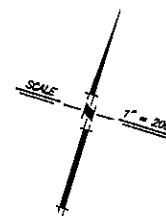
CITY CLERK OF THE CITY OF STOCKTON

RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS
THIS _____ DAY OF _____.

SUPERINTENDENT OF STREETS OF THE CITY OF STOCKTON

FILED THIS _____ DAY OF _____, AT
THE HOUR OF _____ O'CLOCK _____ M., IN BOOK _____; PAGE _____,
OF MAPS OF ASSESSMENT AND COMMUNITY FACILITIES
DISTRICTS IN THE OFFICE OF THE COUNTY RECORDER OF THE
COUNTY OF SAN JOAQUIN, STATE OF CALIFORNIA.

COUNTY RECORDER OF THE COUNTY OF SAN JOAQUIN
STATE OF CALIFORNIA



PROJECT SUMMARY:

CALAVERAS ESTATES UNIT No. 4
TOTAL: 40 DUE'S

LEGEND

PROPOSED ANNEXATION DISTRICT BOUNDARY

EXHIBIT "B"

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REVISIONS	DATE	BY	APP'D
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

EXHIBIT "B" PROPOSED ANNEXATION
CALAVERAS ESTATES UNIT No. 4
STOCKTON, CALIFORNIA

Northstar
Engineering Group, Inc.
1000 G Street, Suite 100
Stockton, CA 95210
Tel: 209.477.1111
Fax: 209.477.1112
www.northstar-engineering.com

DATE: 10-18-2018
DRAWN: J. J. JONES
CHECKED: J. J. JONES
SCALE: AS SHOWN

SHEET
NUMBER
01
OF 01

