

ENGINEER'S REPORT

BD HOMES SUBDIVISION-ZONE 15
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
2021-2022

PREPARED BY:

CONTI & ASSOCIATES, Inc.

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(209) 712.7011

Date Revised: 06/23/2020

**ENGINEER'S REPORT
FOR THE 2021-2022 FISCAL YEAR**

**BD HOMES SUBDIVISION -ZONE 15
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.



Conti & Associates, Inc.

BY: 

Date: June 23, 2020

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 _____ 20__.

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 _____ 20__.

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 _____, 20__.

City Clerk, City of Stockton
San Joaquin County, California

BY: _____

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

June 23, 2020

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 BD Homes Subdivision project is a 2.34-acre 13 lot residential subdivision development in the northwestern portion of the City of Stockton. The development is being pursued by Russell Bowers. The BD Homes Subdivision 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 15, BD Homes Subdivision 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 15.

ASSESSMENT DISTRICT AREA

The area of Zone 15, BD Homes Subdivision is described as a portion of the property within the following assessor's parcels identified by assessor's number (APN):

| Book | Page | Parcel |
|-------------|-------------|---------------|
| 080 | 260 | 02 |

The assessment diagrams for Zone 15, BD Homes Subdivision 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 improvements to be maintained by the funds generated by Zone 15, BD Homes Subdivision 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 15, BD Homes Subdivision 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. (See Exhibit D).

1. Improvements located in BD Homes Subdivision
 - a. Maintenance of the Contech mechanical storm water system

ALLOCATION OF COST

Assessments for the BD Homes Subdivision 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 BD Homes Subdivision 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 13 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 preceding 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 1-13 In the BD Homes Subdivision, 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 US. 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 15 on June 30, the developer shall continue to maintain the improvements until sufficient revenue has been generated by Zone 15 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 2021-2022 taxes for the developed areas are as follows:

Zone 15 BD Homes Subdivision Annexation

Budget Projections/Estimates

OPERATION COSTS

| | |
|---|-------------------|
| Contech Mechanical Storm Filter | |
| Yearly Cleaning and Inspection | \$1,960.00 |
| Material Handling Fee | \$150.00 |
| Maintenance – Replace 7 Filters every 3 years | \$240.00 |
| Replacement Cost – life span of 40 years | \$625.00 |
| | |
| Estimated Total Operation Costs | \$2,975.00 |

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 | \$10,513.00 |
| Total appropriation required from existing fund balance | \$0.00 |
| Total maximum assessment | \$10,513.00 |
| | |
| Total DUE | 13 |
| Maximum Annual Assessment per DUE | \$808.69 |
| | |
| Maximum annual assessment per parcel APN 080-260-02 | \$10,513.00 |

ASSESSMENT ROLL

The assessment roll for the proposed annexation to Zone 15 for the fiscal year 2021-2022 is as follows

| Assessment No. | APN No. | Future Lots No. | Owner | No. of dueF's | Maximum Annual Assessment |
|----------------|---------|---------------------------------|-------|------------------|------------------------------|
| 1 | TBD | BD Homes Subdivision, Lot 1 | TBD | 1 | \$808.69 |
| 2 | TBD | BD Homes Subdivision, Lot 2 | TBD | 1 | \$808.69 |
| 3 | TBD | BD Homes Subdivision, Lot 3 | TBD | 1 | \$808.69 |
| 4 | TBD | BD Homes Subdivision, Lot 4 | TBD | 1 | \$808.69 |
| 5 | TBD | BD Homes Subdivision, Lot 5 | TBD | 1 | \$808.69 |
| 6 | TBD | BD Homes Subdivision, Lot 6 | TBD | 1 | \$808.69 |
| 7 | TBD | BD Homes Subdivision, Lot 7 | TBD | 1 | \$808.69 |
| 8 | TBD | BD Homes Subdivision, Lot 8 | TBD | 1 | \$808.69 |
| 9 | TBD | BD Homes Subdivision, Lot 9 | TBD | 1 | \$808.69 |
| 10 | TBD | BD Homes Subdivision, Lot 10 | TBD | 1 | \$808.69 |
| 11 | TBD | BD Homes Subdivision, Lot 11 | TBD | 1 | \$808.69 |
| 12 | TBD | BD Homes Subdivision, Lot 12 | TBD | 1 | \$808.69 |
| 13 | TBD | BD Homes Subdivision, Lot 13 | TBD | 1 | \$808.69 |

The parcels in the proposed BD Homes Subdivision are expected to subdivide upon the formation of Zone 15. The proposed subdivision will contain a total of 13 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 2021-2022 fiscal year levy on developed parcels will be determined at the City's 2021-2022 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 _____, 20__.



Conti & Associates, Inc.

BY: 

Date: June 23, 2020

**EXHIBIT “A”
PROPOSED ASSESSMENT**

**BD HOMES SUBDIVISION - ZONE 15
STOCKTON CONSOLIDATED STORM DRAINAGE MAINTENANCE
ASSESSMENT DISTRICT No. 2005-1**

| Assessment Diagram No. | County Assessor Number (APN) | Lots No. | Maximum Annual Assessment Amount |
|-----------------------------------|---|-----------------|---|
| 1 | 080-XXX-XX | Lot 1 | \$808.69 |
| 2 | 080-XXX-XX | Lot 2 | \$808.69 |
| 3 | 080-XXX-XX | Lot 3 | \$808.69 |
| 4 | 080-XXX-XX | Lot 4 | \$808.69 |
| 5 | 080-XXX-XX | Lot 5 | \$808.69 |
| 6 | 080-XXX-XX | Lot 6 | \$808.69 |
| 7 | 080-XXX-XX | Lot 7 | \$808.69 |
| 8 | 080-XXX-XX | Lot 8 | \$808.69 |
| 9 | 080-XXX-XX | Lot 9 | \$808.69 |
| 10 | 080-XXX-XX | Lot 10 | \$808.69 |
| 11 | 080-XXX-XX | Lot 11 | \$808.69 |
| 12 | 080-XXX-XX | Lot 12 | \$808.69 |
| 13 | 080-XXX-XX | Lot 13 | \$808.69 |