



CITY OF ATASCADERO CITY COUNCIL AGENDA

HYBRID MEETING INFORMATION:

The City Council meeting will be available via teleconference for those who wish to participate remotely. The City Council meeting will also be held in the City Council Chambers and in-person attendance will be available at that location.

HOW TO OBSERVE THE MEETING REMOTELY:

To participate remotely, residents can livestream the meeting on [Zoom](#), SLO-SPAN.org, on Spectrum cable Channel 20 in Atascadero, and listen live on KPRL Radio 1230AM and 99.3FM. The video recording of the meeting will repeat daily on Channel 20 at 1:00 am, 9:00 am, and 6:00 pm and will be available through the City's website and on the City's YouTube Channel. To participate remotely using the Zoom platform please visit:

https://us02web.zoom.us/webinar/register/WN_ZwJ7a031S3KXauEym9ehaA

HOW TO SUBMIT PUBLIC COMMENT:

Public comment may be provided in-person or remotely. Call **(669) 900-6833** (Meeting ID: 889 2347 9018) to listen and provide public comment via phone or via the [Zoom](#) platform using the link above.

Note that the Zoom participation option is provided to the public as a courtesy in order to facilitate participation. The City does not, however, guarantee that meeting participation will be available via Zoom. If Zoom participation is not enabled, or turned off, the meeting will continue with public attendance in-person only.

Written public comments are accepted at cityclerk@atascadero.org. **Comments should identify the Agenda Item Number in the subject line of the email.** Such comments will be forwarded to the City Council and made a part of the administrative record. **To ensure distribution to the City Council before consideration of an item, please submit comments not later than 12:00 p.m. the day of the meeting.** All correspondence will be distributed to the City Council, posted on the City's website, and be made part of the official public record of the meeting. **Please note, comments will not be read into the record.** Please be aware that communications sent to the City Council are public records and are subject to disclosure pursuant to the California Public Records Act and Brown Act unless exempt from disclosure under applicable law. Communications will not be edited for redactions and will be printed/posted as submitted.

AMERICAN DISABILITY ACT ACCOMMODATIONS:

Any member of the public who needs accommodations should contact the City Clerk's Office at cityclerk@atascadero.org or by calling 805-470-3400 at least 48 hours prior to the meeting or time when services are needed. The City will use their best efforts to provide reasonable accommodations to afford as much accessibility as possible while also maintaining public safety in accordance with the City procedure for resolving reasonable accommodation requests.

DISCLOSURE OF CAMPAIGN CONTRIBUTIONS:

Pursuant to Government Code § 84308, City Council Members are disqualified and not able to participate in any agenda item involving contracts (other than competitively bid, labor, or personal employment contracts), franchises, discretionary land use permits and other entitlements if the City Council Member received more than \$250 in campaign contributions from the applicant or contractor, an agent of the applicant or contractor, or any financially interested participant who actively supports or opposes the City's decision on the agenda item since January 1, 2023. Members of the City Council who have received, and applicants, contractors or their agents who have made, campaign contributions totaling more than \$250 to a City Council Member since January 1, 2023, are required to disclose that fact for the official record of the subject proceedings. Disclosures must include the amount of the campaign contribution and identify the recipient City Council Member and may be made either in writing to the City Clerk before the agenda item or by verbal disclosure during consideration.

City Council agendas and minutes may be viewed on the City's website:

www.atascadero.org/agendas

Copies of the staff reports or other documentation relating to each item of business referred to on the Agenda are on file in the office of the City Clerk and are available for public inspection on our website, www.atascadero.org. Contracts, Resolutions and Ordinances will be allocated a number once they are approved by the City Council. The Minutes of this meeting will reflect these numbers. All documents submitted by the public during Council meetings that are made a part of the record or referred to in their statement will be noted in the Minutes and available for review by contacting the City Clerk's office. All documents will be available for public inspection by appointment during City Hall business hours.



CITY OF ATASCADERO CITY COUNCIL

AGENDA

Tuesday, May 28, 2024

City Hall Council Chambers, Fourth Floor
6500 Palma Avenue, Atascadero, California

<u>City Council Regular Session:</u>	6:00 P.M.
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REGULAR SESSION – CALL TO ORDER: 6:00 P.M.

PLEDGE OF ALLEGIANCE: Council Member Dariz

ROLL CALL:
Mayor Moreno
Mayor Pro Tem Funk
Council Member Bourbeau
Council Member Dariz
Council Member Newsom

CLOSED SESSION – REPORT (IF ANY)

a. **May 14, 2024**

A. CONSENT CALENDAR: (All items on the consent calendar are considered routine and non-controversial by City staff and will be acted upon by a single action of the City Council unless otherwise requested by an individual Council Member for separate consideration. Public comment on Consent Calendar items will be invited prior to action on the Calendar.)

1. City Council Draft Minutes – May 14, 2024 Special and Regular Meeting

- Recommendation: Council approve the May 14, 2024, Draft City Council Special and Regular Meeting Minutes. [City Clerk]

2. April 2024 Accounts Payable and Payroll

- Fiscal Impact: \$2,449,550.40.
- Recommendation: Council approve certified City accounts payable, payroll and payroll vendor checks for April 2024. [Administrative Services]

3. Apple Valley Assessment Districts

- Fiscal Impact: Annual assessments for 2024/2025 will total \$38,500 for road/drainage system maintenance and \$63,000 for landscape and lighting maintenance. These amounts will be assessed to the owners of parcels in Apple Valley. Contributions of \$11,000 for half the cost of the park will be made from the City's General Fund, and an equal revenue source will be recognized from contributions made by the developer.
- Recommendation: Council:

1. Adopt Draft Resolution A, initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025.
2. Adopt Draft Resolution B, accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley).
3. Adopt Draft Resolution C, declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters.
4. Adopt Draft Resolution D, initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code.
5. Adopt Draft Resolution E, for preliminary approval of the Annual Engineer's Levy Report for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025.
6. Adopt Draft Resolution F, declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025.
[Administrative Services]

4. De Anza Estates Assessment Districts

- Fiscal Impact: Annual assessments for 2024/2025 will total \$30,562 for road/drainage system maintenance and \$15,875 for landscape and lighting maintenance. These amounts will be assessed to the owners of parcels in De Anza Estates. The City General Fund will contribute \$1,400 for the fiscal year 2024/2025 for half of the maintenance costs of the trails and open space.
- Recommendation: Council:
 1. Adopt Draft Resolution A, initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025.
 2. Adopt Draft Resolution B, accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates).
 3. Adopt Draft Resolution C, declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters.
 4. Adopt Draft Resolution D, initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code.
 5. Adopt Draft Resolution E, for preliminary approval of the Annual Engineer's Levy Report for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025.
 6. Adopt Draft Resolution F, declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025.
[Administrative Services]

5. Las Lomas (Woodridge) Assessment Districts

- Fiscal Impact: Annual assessments for 2024/2025 will total \$101,506 for road/drainage system maintenance and \$76,014 for landscape and lighting maintenance. These amounts will be assessed to the owners of parcels in Las Lomas (Woodridge). The City General Fund will contribute \$2,600 for the fiscal year 2024/2025 for 25% of the maintenance costs of the trails and open space.
- Recommendation: Council:
 1. Adopt Draft Resolution A, initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025.
 2. Adopt Draft Resolution B, accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 02 (Las Lomas [Woodridge]).
 3. Adopt Draft Resolution C, declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 02 (Las Lomas [Woodridge]) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters.
 4. Adopt Draft Resolution D, initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code.
 5. Adopt Draft Resolution E, for preliminary approval of the Annual Engineer's Levy Report for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025.
 6. Adopt Draft Resolution F, declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025. [Administrative Services]

6. March 2024 Investment Report

- Fiscal Impact: None.
- Recommendation: Council receive and file the City Treasurer's report for quarter ending March 31, 2024. [City Treasurer]

7. Downtown Parking and Business Improvement Area (DPBIA) Assessment

- Fiscal Impact: None.
- Recommendation: Council adopt Draft Resolution, declaring intent to levy the annual Downtown Parking and Business Improvement Area assessment, and set a public hearing for June 11, 2024. [Community Services & Promotions]

8. Atascadero Tourism Business Improvement District (ATBID) Assessment

- Fiscal Impact: None.
- Recommendation: Council:
 1. Approve the ATBID Annual Report.
 2. Adopt Draft Resolution, declaring intent to levy an annual Business Improvement District assessment on lodging businesses within the Atascadero Tourism Business Improvement District, and set a public hearing for June 11, 2024. [Community Services & Promotions]

- 9. Annual Military Equipment Report Pursuant to Assembly Bill 481**
- Fiscal Impact: None.
 - Recommendation: Council receive and file the annual Military Equipment Report pursuant to the requirements of Assembly Bill 481. [Police Department]
- 10. Purchase of CCTV Inspection Vehicle for Wastewater Operations**
- Fiscal Impact: \$274,961 of budgeted wastewater funds.
 - Recommendation: Council approve the purchase of one EnviroSight High Definition Rover X CCTV Inspection Vehicle from Haaker Equipment Company for \$274,961 for wastewater collection system maintenance and operations. [Public Works]
- 11. Update on Local Emergency Proclamation Related to Early February 2024 Storms**
- Fiscal Impact: There is no fiscal impact related to staff's recommendation. Continuation of the local emergency proclamation is necessary in order to qualify for FHWA Emergency Repair funding for the San Marcos Road landslide repairs. Total costs for this project are estimated to be in the range of \$800,000 to \$1,000,000.
 - Recommendation: Council continue the proclamation of the existence of a local emergency related to early February 2024 storms. [Public Works]
- 12. El Camino Real Downtown Infrastructure Enhancement Project Construction Award**
- Fiscal Impact: Approving staff recommendations will result in estimated combined expenditures up to \$10,824,490 from LTF, Circulation System Fund, General Fund, State Legislative Grant, USHA, RSHA, and 2010 Bond Master Agreement Funds; and up to \$1,118,930 in Wastewater Funds.
 - Recommendation: Council:
 1. Award a construction contract to Souza Construction for the Base Bid and Bid Additive Alternate 1 and 4 schedules for a combined total of \$9,490,234 for the El Camino Real Downtown Infrastructure Enhancement Project, Project No. C2017T01 ("Project").
 2. Award a professional services contract to Filippin Engineering, Inc. for \$729,718 to perform construction management, inspection, and materials testing services for the Project.
 3. Authorize the Director of Administrative Services to allocate an additional \$118,930 in Wastewater Fund Reserves toward the Project for FY2024/25. [Public Works]
- 13. Charles Paddock Zoo Funding for AZA Accreditation Budget**
- Fiscal Impact: \$305,000.
 - Recommendation: Council authorize the Director of Administrative Services to appropriate \$305,000 in General Fund reserves to the Charles Paddock Zoo's Budget for the Association of Zoos and Aquariums (AZA) accreditation process. [Community Services & Promotions]

UPDATES FROM THE CITY MANAGER: (The City Manager will give an oral report on any current issues of concern to the City Council.)

COMMUNITY FORUM: (This portion of the meeting is reserved for persons wanting to address the Council on any matter not on this agenda and over which the Council has jurisdiction. Speakers are limited to three minutes. Please state your name for the record before making your presentation. Comments made during Community Forum will not be a subject of discussion. A maximum of 30 minutes will be allowed for Community Forum, unless changed

by the Council. Comments will be allowed for the entire 30-minute period so if the final speaker has finished before the 30-minute period has ended and a member of the public wishes to make a comment after the Council has commenced another item, the member should alert the Clerk within the 30-minute period of their desire to make a comment and the Council will take up that comment upon completion of the item which was commenced. Any members of the public who have questions or need information may contact the City Clerk's Office, between the hours of 8:30 a.m. and 5:00 p.m. at (805) 470-3400, or cityclerk@atascadero.org.)

B. PUBLIC HEARINGS:

1. Amendments to Fee Schedule

- Fiscal Impact: There will be an increase in operating revenue resulting from the CPI increase, with an offsetting increase in costs to provide the services.
- Recommendation: Council adopt Draft Resolution, adopting amended fees and deposits to offset costs incurred in planning services, and adopt a schedule of fees and charges for City services. [Administrative Services]

C. MANAGEMENT REPORTS:

1. Request for Authorization for Amendments to Del Rio Ranch

- Fiscal Impact: If developed with lodging, retail and tourist-oriented uses, this site is likely to become a positive fiscal contribution to the City and may act as a catalyst to attract additional head of household jobs and other tax revenue supporting land uses within the Del Rio vicinity.
- Recommendation: Council consider authorization for the applicant team to proceed with amendments to the General Plan Map, Zoning Map, Specific Plan, and Master Plan of Development (Use Permit) for the Del Rio Ranch project site to allow for an RV and glamping resort on the 25-acre site. [Community Development]

2. Appointive City Treasurer Ballot Measure

- Fiscal Impact: The addition of a ballot measure to the November 2024 ballot is estimated to be \$3,000-\$6,000. If the ballot measure is successful, savings from the elimination of the stipends and health benefit costs for the elected position is estimated to be about \$16,800 annually.
- Recommendation: Council direct the City Clerk to bring back to the Council in June 2024 the Resolution required for placing a ballot measure on the ballot for the General Municipal Election to be held on Tuesday, November 5, 2024, asking voters "Shall the City Treasurer be appointive?". [Administrative Services]

D. COUNCIL ANNOUNCEMENTS AND COMMITTEE REPORTS: (On their own initiative, Council Members may make a brief announcement or a brief report on their own activities. The following represent standing committees. Informative status reports will be given, as felt necessary):

Mayor Moreno

1. City Selection Committee
2. County Mayors Round Table
3. Regional Economic Action Coalition (REACH)
4. SLO Council of Governments (SLOCOG)
5. SLO Regional Transit Authority (RTA)

Mayor Pro Tem Funk

1. Atascadero Basin Ground Water Sustainability Agency (GSA)
2. Design Review Committee
3. Homeless Services Oversight Council

Council Member Bourbeau

1. City of Atascadero Finance Committee
2. City / Schools Committee
3. Integrated Waste Management Authority (IWMA)
4. SLO County Water Resources Advisory Committee (WRAC)

Council Member Dariz

1. Air Pollution Control District
2. California Joint Powers Insurance Authority (CJPIA) Board
3. Community Action Partnership of San Luis Obispo (CAPSLO)
4. Design Review Committee
5. Visit SLO CAL Advisory Committee

Council Member Newsom

1. City of Atascadero Finance Committee
2. City / Schools Committee
3. League of California Cities – Council Liaison

E. INDIVIDUAL DETERMINATION AND / OR ACTION: (Council Members may ask a question for clarification, make a referral to staff or take action to have staff place a matter of business on a future agenda. The Council may take action on items listed on the Agenda.)

1. City Council
2. City Clerk
3. City Treasurer
4. City Attorney
5. City Manager

ADJOURNMENT

SPECIAL MEETING ATASCADERO CITY COUNCIL

Tuesday, May 14, 2024, 5:30 P.M.
Atascadero City Hall, Council Chambers, Fourth Floor
6500 Palma Avenue, Atascadero, California

INTERVIEWS AND APPOINTMENT

Atascadero Tourism Business Improvement District (ATBID) Advisory Board

DRAFT MINUTES

Mayor Moreno called the meeting to order at 5:31 P.M.

ROLL CALL:

Present: Council Members Bourbeau, Dariz, Newsom, Mayor Pro Tem Funk and Mayor Moreno

Absent: None

Staff Present: City Manager Jim Lewis, Community Services & Promotions Director Terrie Banish, Deputy City Manager Lara Christensen, Deputy City Manager - IT Luke Knight, and City Attorney Dave Fleishman.

1. Interview Process

- *City Clerk recommendation: Council discuss process for conducting ATBID Advisory Board interviews.*

Director of Community Services & Promotions Terrie Banish provided Council with background information regarding the nomination process for three upcoming ATBID Advisory Board member terms, and the recommendations for appointment of two existing ATBID Advisory Board Members and interviewing two applicants for the third. .

2. ATBID Advisory Board Appointment

- *City Clerk recommendation: Council:*
 1. *Appoint Amar Sohi and Patricia Harden, who were duly nominated, to a 2-year term on the ATBID Advisory Board beginning July 1, 2024, and ending June 30, 2026.*

MOTION BY: Funk

SECOND BY: Newsom

1. **Appoint Amar Sohi and Patricia Harden, respectively, to the ATBID Advisory Board for 2-year terms beginning July 1, 2024, and ending June 30, 2026.**

AYES (5): Bourbeau, Dariz, Newsom, Funk, and Moreno

Passed 5-0

2. *Interview Jeffrey Lemus and Sarah Maggelet and appoint either applicant to a 2-year term on the ATBID Advisory Board beginning July 1, 2024, and ending June 30, 2026.*

Council interviewed applicants Jeffrey Lemus and Sarah Maggelet, respectively.

PUBLIC COMMENT:

Mayor Moreno opened the Public Comment period.

The following persons spoke on this item: None.

Mayor Moreno closed the Public Comment period.

MOTION BY: Newsom

SECOND BY: Bourbeau

2. **Appoint Jeffrey Lemus to the ATBID Advisory Board for a 2-year term beginning July 1, 2024, and ending June 30, 2026.**

AYES (5): Bourbeau, Dariz, Newsom, Funk, and Moreno

Passed 5-0

3. Announcement of Appointment

Amar Sohi, Patricia Harden, and Jeffrey Lemus were appointed to the ATBID Advisory Board for 2-year terms beginning July 1, 2024, and ending June 30, 2026.

ADJOURNMENT:

Mayor Moreno adjourned the meeting at 5:54 P.M. to the next Regular Session on Tuesday, May 14, 2024, at 6:00 P.M.

MINUTES PREPARED BY:

Lara K. Christensen
Deputy City Manager/City Clerk

APPROVED:



CITY OF ATASCADERO CITY COUNCIL

DRAFT MINUTES

Tuesday, May 14, 2024

City Hall Council Chambers, Fourth Floor
6500 Palma Avenue, Atascadero, California

<u>City Council Regular Session:</u>	6:00 P.M.
<u>City Council Closed Session:</u>	Immediately following conclusion of City Council Regular Session

REGULAR SESSION — CALL TO ORDER: 6:00 P.M.

Mayor Moreno called the meeting to order at 6:03 P.M. and Council Member Bourbeau led the Pledge of Allegiance.

ROLL CALL:

- Present: Council Members Bourbeau, Dariz, Newsom, Mayor Pro Tem Funk, and Mayor Moreno
- Absent: None
- Others Present: None
- Staff Present: City Manager James R. Lewis, Deputy City Manager/City Clerk Lara Christensen, Fire Chief Casey Bryson, Police Chief Dan Suttles, Public Works Director Nick DeBar, City Attorney Dave Fleishman, Deputy City Manager – IT Luke Knight, and Battalion Chief Dave Van Son.

CLOSED SESSION – REPORT (IF ANY)

a. April 9, 2024

City Attorney Fleishman reported there was no reportable action.

PRESENTATIONS:

1. National Public Works Week

The City Council presented a proclamation to the City’s Public Works Department in recognition of National Public Works Week.

A. CONSENT CALENDAR:

1. City Council Draft Minutes – April 20, 2024 Special Meeting and April 23, 2024 Regular Meeting

- Recommendation: Council approve the April 20, 2024, Draft City Council Special Meeting Minutes and the April 23, 2024, Draft City Council Regular Meeting Minutes. [City Clerk]

2. Legislative Platform Update

- Fiscal Impact: None.
- Recommendation: Council approve the updated 2024 Federal and State Legislative Platform. [City Manager]

3. Community Development Staffing Adjustment

- Fiscal Impact: Potential General Fund salary savings of up to \$17,800 annually.
- Recommendation: Council:
 1. Authorize the City Manager to add the title *Chief Building Official*.
 2. Amend the fiscal year 2023-2024 monthly salary schedule to add new position as follows:

CLASSIFICATION	RANGE	STEP A	STEP B	STEP C	STEP D	STEP E
Chief Building Official	M46	9,395.18	9,864.94	10,358.19	10,876.10	11,419.91

3. Adopt Draft Resolution for Non-Represented Professional and Management Workers and Confidential Employees. [Community Development]

PUBLIC COMMENT:

Mayor Moreno opened the Public Comment period.

The following persons spoke on this item: None.

Mayor Moreno closed the Public Comment period.

MOTION BY: Bourbeau

SECOND BY: Funk

1. Approve Consent Calendar (#A-3: Resolution No. 2024-008).

AYES (5): Bourbeau, Dariz, Newsom, Funk, and Moreno

Passed 5-0

UPDATES FROM THE CITY MANAGER:

City Manager Lewis gave an update on projects and events within the City.

COMMUNITY FORUM:

The following persons spoke by telephone or through the webinar: John DiNunzio, Geoff Auslen, Wendy Lewis, Tom Walton, Gary Lehrer, Becky Hallett, Vicky Miller, Scott Staton, Maria Smith, and Dan Hathaway.

B. PUBLIC HEARINGS:

1. Weed Abatement Hearing of Objections

- Fiscal Impact: None. Costs are recovered through assessments charged to non-compliant parcels that must be abated by the City Contractor. Those property owners who comply with the Municipal Code are not assessed or charged.

- Recommendation: Council:
 1. Hear all objections to the proposed removal of vegetative growth and/or refuse and allow or overrule any objections.
 2. Authorize the Fire Chief to proceed and perform the work of abatement. [Fire & Emergency Services]

Ex-Parte: None.

Battalion Chief Van Son gave the report and he and Fire Chief Bryson answered questions from Council.

PUBLIC COMMENT:

Mayor Moreno opened the Public Comment period.

The following persons spoke on this item: Ray Wilson, Chuck Kemp, and Geoff Auslen.

Mayor Moreno closed the Public Comment period.

MOTION BY: Bourbeau
SECOND BY: Funk

1. Authorize the Fire Chief to proceed and perform the work of abatement.

AYES (5): Bourbeau, Dariz, Newsom, Funk, and Moreno

Passed 5-0

C. MANAGEMENT REPORTS:

1. Community Cleanliness

- Fiscal Impact: \$60,000 in General Fund reserves over fiscal years 2023-2024 and 2024-2025.
- Recommendation: Council:
 1. Provide direction to staff on options to enhance and/or expand the existing Graffiti Abatement ordinance.
 2. Provide staff direction on options to address the unauthorized removal of shopping carts from retail establishments and the abatement of abandoned shopping carts.
 3. Authorize the Director of Administrative Services to appropriate an additional \$30,000 of General Fund Reserves for Campsite Debris Removal in each of the fiscal years 2023-2024 and 2024-2025 and move the budget for Campsite Debris Removal from the Parks Division of the Public Works Department to the Police Department. [Police Department]

Chief Suttles gave the report and answered questions from Council. City Manager Lewis and Public Works Director DeBar also answered questions from the Council.

PUBLIC COMMENT:

Mayor Moreno opened the Public Comment period.

The following persons spoke on this item: Geoff Auslen.

Mayor Moreno closed the Public Comment period.

Following discussion, Council provided staff direction on options to enhance and/or expand the existing Graffiti Abatement ordinance and on options to address the unauthorized

removal of shopping carts from retail establishments and the abatement of abandoned shopping carts.

MOTION BY: Bourbeau
SECOND BY: Funk

1. **Authorize the Director of Administrative Services to appropriate an additional \$30,000 of General Fund Reserves for Campsite Debris Removal in each of the fiscal years 2023-2024 and 2024-2025 and move the budget for Campsite Debris Removal from the Parks Division of the Public Works Department to the Police Department.**

AYES (5): Bourbeau, Dariz, Newsom, Funk, and Moreno

Passed 5-0

D. COUNCIL ANNOUNCEMENTS AND COMMITTEE REPORTS:

The following Council Members gave brief update reports on their committees since their last Council meeting:

Mayor Moreno

2. County Mayors Round Table
3. Regional Economic Action Coalition (REACH)
4. SLO Council of Governments (SLOCOG)
5. SLO Regional Transit Authority (RTA)

Mayor Pro Tem Funk

2. Homeless Services Oversight Council

Council Member Bourbeau

3. Integrated Waste Management Authority (IWMA)

Council Member Newsom

2. City / Schools Committee

E. INDIVIDUAL DETERMINATION AND / OR ACTION: None.

ADJOURN TO CITY COUNCIL CLOSED SESSION

Mayor Moreno recessed the Regular Meeting at 8:41 P.M. and called the Closed Session Meeting to order.

CITY COUNCIL CLOSED SESSION:

1. CLOSED SESSION — PUBLIC COMMENT

PUBLIC COMMENT:

Mayor Moreno opened the Public Comment period.

The following persons spoke on this item: None.

Mayor Moreno closed the Public Comment period.

2. COUNCIL LEAVES CHAMBERS TO BEGIN CLOSED SESSION

3. CLOSED SESSION — CALL TO ORDER

- a. **Conference with Labor Negotiators** (Govt. Code Sec. 54957.6)
Agency designated representatives: James R. Lewis, City Manager
Employee organizations: Atascadero Professional Firefighters, Local 3600;
Atascadero Police Association; Service Employees International Union, Local 620; Mid-Management/Professional Employees; Non-Represented Professional and Management Workers and Confidential Employees

4. CLOSED SESSION — ADJOURNMENT

Following Closed Session, the meeting was adjourned at 9:23 P.M.; no reportable action taken.

MINUTES PREPARED BY:

Lara K. Christensen
City Clerk

APPROVED:



Atascadero City Council

Staff Report - Administrative Services Department

April 2024 Accounts Payable and Payroll

RECOMMENDATION:

Council approve certified City accounts payable, payroll and payroll vendor checks for April 2024.

DISCUSSION:

Attached for City Council review and approval are the following:

Payroll

Dated	4/11/24	Checks # 36029-36045	\$	11,969.63
		Direct Deposits		420,618.58
Dated	4/25/24	Checks # 36046-36056		8,538.41
		Direct Deposits		381,257.98

Accounts Payable

Dated	4/1/24-4/30/24	Checks # 177630 - 177904 & EFTs 5100-5142		<u>1,627,165.80</u>
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TOTAL AMOUNT \$ 2,449,550.40

FISCAL IMPACT:

Total expenditures for all funds is \$ 2,449,550.40

CERTIFICATION:

The undersigned certifies that the attached demands have been released for payment and that funds are available for these demands.


 Jeri Rangel
 Director of Administrative Services

ATTACHMENT:

April 2024 Eden Warrant Register in the amount of \$ 1,627,165.80

City of Atascadero
Disbursement Listing
 For the Month of April 2024

Check Number	Check Date	Vendor	Description	Amount
5108	04/01/2024	SEIU LOCAL 620	Payroll Vendor Payment	870.85
177630	04/01/2024	WEX BANK - BUSINESS UNIVERSAL	Accounts Payable Check	12,432.93
177631	04/01/2024	WEX BANK - WEX FLEET UNIVERSAL	Accounts Payable Check	7,615.22
5100	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	21,756.73
5101	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	35,334.42
5102	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,756.82
5103	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,837.45
5104	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	8,358.34
5105	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	11,236.23
5106	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	14,808.94
5107	04/02/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	26,011.99
5109	04/02/2024	RABOBANK, N.A.	Payroll Vendor Payment	68,379.25
5110	04/02/2024	EMPLOYMENT DEV DEPARTMENT	Payroll Vendor Payment	20,913.85
5111	04/02/2024	EMPLOYMENT DEV. DEPARTMENT	Payroll Vendor Payment	3,192.66
177632	04/03/2024	ANTHEM BLUE CROSS HEALTH	Payroll Vendor Payment	219,314.76
177633	04/05/2024	2 MEXICANS, LLC	Accounts Payable Check	1,481.50
177634	04/05/2024	A.P.S. AUTOMOTIVE	Accounts Payable Check	314.87
177635	04/05/2024	ALLAN HANCOCK COLLEGE	Accounts Payable Check	1,019.29
177636	04/05/2024	ALLIANT INSURANCE SERVICES INC	Accounts Payable Check	185.00
177637	04/05/2024	ALPHA ELECTRIC SERVICE	Accounts Payable Check	540.00
177638	04/05/2024	AMERICAN WEST TIRE & AUTO INC	Accounts Payable Check	581.84
177639	04/05/2024	AT&T	Accounts Payable Check	805.11
177640	04/05/2024	AT&T	Accounts Payable Check	29.35
177641	04/05/2024	AT&T	Accounts Payable Check	31.71
177642	04/05/2024	ATASCADERO GIRLS SOFTBALL	Accounts Payable Check	472.50
177643	04/05/2024	ATASCADERO LITTLE LEAGUE	Accounts Payable Check	250.00
177645	04/05/2024	ATASCADERO MUTUAL WATER CO.	Accounts Payable Check	4,901.55
177646	04/05/2024	ATASCADERO YOUTH FOOTBALL	Accounts Payable Check	1,832.00
177647	04/05/2024	AVILA TRAFFIC SAFETY	Accounts Payable Check	766.43
177648	04/05/2024	TERRIE BANISH	Accounts Payable Check	300.00
177649	04/05/2024	BASSETT'S CRICKET RANCH, INC.	Accounts Payable Check	626.43
177650	04/05/2024	BATTERY SYSTEMS, INC.	Accounts Payable Check	140.73
177651	04/05/2024	BAUER COMPRESSORS	Accounts Payable Check	3,359.58
177652	04/05/2024	BELL'S PLUMBING REPAIR, INC.	Accounts Payable Check	610.00
177653	04/05/2024	KEITH R. BERGHER	Accounts Payable Check	112.50
177654	04/05/2024	BERRY MAN, INC.	Accounts Payable Check	1,350.80
177655	04/05/2024	BLUEPRINTER	Accounts Payable Check	239.02
177656	04/05/2024	BRANCH SMITH PROPERTIES	Accounts Payable Check	398.00
177657	04/05/2024	BURT INDUSTRIAL SUPPLY	Accounts Payable Check	292.54
177658	04/05/2024	CAL-COAST MACHINERY, INC	Accounts Payable Check	10.96

City of Atascadero
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 For the Month of April 2024

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177659	04/05/2024	CENTRAL COAST CASUALTY REST.	Accounts Payable Check	410.37
177660	04/05/2024	CG VISUAL SOLUTIONS CORP.	Accounts Payable Check	458.58
177661	04/05/2024	CHARTER COMMUNICATIONS	Accounts Payable Check	1,965.13
177662	04/05/2024	CITY OF ATASCADERO	Accounts Payable Check	573.00
177663	04/05/2024	CLEVER CONCEPTS, INC.	Accounts Payable Check	49.95
177664	04/05/2024	COLE FARMS, INC.	Accounts Payable Check	710.86
177665	04/05/2024	HOLLY R. COLLINS	Accounts Payable Check	144.00
177666	04/05/2024	COLOR CRAFT PRINTING	Accounts Payable Check	175.58
177667	04/05/2024	CS NOW, INC.	Accounts Payable Check	273.00
177668	04/05/2024	CULLIGAN SANTA MARIA	Accounts Payable Check	241.89
177669	04/05/2024	GREG C. CUNNINGHAM	Accounts Payable Check	60.00
177670	04/05/2024	DAN BIDDLE PEST CONTROL SERVIC	Accounts Payable Check	135.00
177671	04/05/2024	SHARON J. DAVIS	Accounts Payable Check	273.00
177672	04/05/2024	NICHOLAS DEBAR	Accounts Payable Check	300.00
177673	04/05/2024	DEEP BLUE INTEGRATION, INC.	Accounts Payable Check	540.00
177674	04/05/2024	DEPARTMENT OF JUSTICE	Accounts Payable Check	530.00
177675	04/05/2024	DEPARTMENT OF WATER RESOURCES	Accounts Payable Check	4,835.00
177676	04/05/2024	DEPENDABLE FIRE PROTECTION	Accounts Payable Check	568.89
177677	04/05/2024	DIVISION OF STATE ARCHITECT	Accounts Payable Check	914.80
177678	04/05/2024	DOOMSDAY SKATE, LLC	Accounts Payable Check	180.00
177679	04/05/2024	PHILIP DUNSMORE	Accounts Payable Check	300.00
177680	04/05/2024	EIKHOF DESIGN GROUP, INC.	Accounts Payable Check	648.90
177681	04/05/2024	EL CAMINO VETERINARY HOSP	Accounts Payable Check	353.18
177682	04/05/2024	ESCUELA DEL RIO	Accounts Payable Check	180.00
177683	04/05/2024	EXECUTIVE JANITORIAL	Accounts Payable Check	4,250.00
177684	04/05/2024	FENCE FACTORY ATASCADERO	Accounts Payable Check	490.50
177685	04/05/2024	CODY FERRIS	Accounts Payable Check	266.00
177686	04/05/2024	FILIPPIN ENGINEERING, INC.	Accounts Payable Check	17,024.56
177687	04/05/2024	GAS COMPANY	Accounts Payable Check	1,149.71
177688	04/05/2024	GHS PARTS, INC.	Accounts Payable Check	622.70
177689	04/05/2024	KELLY GLEASON	Accounts Payable Check	34.00
177690	04/05/2024	KADEN GROSECLOSE	Accounts Payable Check	266.00
177691	04/05/2024	TRISTAN M. GUILLORY	Accounts Payable Check	90.00
177692	04/05/2024	HANSEN BRO'S CUSTOM FARMING	Accounts Payable Check	15,400.00
177694	04/05/2024	VOID	Accounts Payable Check	0.00
177695	04/05/2024	IRON MOUNTAIN RECORDS MGMNT	Accounts Payable Check	154.29
177696	04/05/2024	JK'S UNLIMITED, INC.	Accounts Payable Check	1,008.12
177697	04/05/2024	JOANN HEAD LAND SURVEYING	Accounts Payable Check	3,017.40
177698	04/05/2024	JOE A. GONSALVES & SON	Accounts Payable Check	3,000.00
177699	04/05/2024	K & M INTERNATIONAL	Accounts Payable Check	2,935.99

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177700	04/05/2024	KIRK CONSTRUCTION	Accounts Payable Check	7,864.77
177701	04/05/2024	KMIT SOLUTIONS	Accounts Payable Check	3,315.00
177702	04/05/2024	JAMES R. LEWIS	Accounts Payable Check	300.00
177703	04/05/2024	LIN LI	Accounts Payable Check	162.00
177704	04/05/2024	JACKSON LIGHT	Accounts Payable Check	266.00
177705	04/05/2024	LINDE GAS & EQUIPMENT INC.	Accounts Payable Check	65.88
177706	04/05/2024	MATTHEW MADRIGAL	Accounts Payable Check	266.00
177707	04/05/2024	MARBORG INDUSTRIES	Accounts Payable Check	73.05
177708	04/05/2024	MBS LAND SURVEYS	Accounts Payable Check	7,000.00
177709	04/05/2024	MICHAEL K. NUNLEY & ASSC, INC.	Accounts Payable Check	4,804.18
177710	04/05/2024	MID-COAST FIRE PROTECTION, INC	Accounts Payable Check	363.00
177711	04/05/2024	MID-COAST MOWER & SAW, INC.	Accounts Payable Check	199.92
177712	04/05/2024	MINER'S ACE HARDWARE	Accounts Payable Check	442.50
177713	04/05/2024	MATTHEW J. MIRANDA	Accounts Payable Check	666.00
177714	04/05/2024	MOBILE SMALL ENGINE REPAIR	Accounts Payable Check	400.00
177715	04/05/2024	MV TRANSPORTATION, INC.	Accounts Payable Check	11,067.22
177716	04/05/2024	NBS	Accounts Payable Check	7,917.08
177717	04/05/2024	KELLYE R. NETZ	Accounts Payable Check	190.00
177718	04/05/2024	NEW TIMES	Accounts Payable Check	71.00
177719	04/05/2024	NUTRIEN AG SOLUTIONS, INC.	Accounts Payable Check	1,677.41
177720	04/05/2024	OCCUPATIONAL HEALTH CTRS OF CA	Accounts Payable Check	256.00
177721	04/05/2024	ANJANETTE ORDONEZ	Accounts Payable Check	120.00
177722	04/05/2024	PACIFIC CNTRL COAST HLTH CTRS	Accounts Payable Check	1,225.00
177724	04/05/2024	PACIFIC GAS AND ELECTRIC	Accounts Payable Check	48,955.96
177725	04/05/2024	PERRY'S PARCEL & GIFT	Accounts Payable Check	50.00
177726	04/05/2024	PROCARE JANITORIAL SUPPLY, INC.	Accounts Payable Check	1,069.44
177727	04/05/2024	QUADIEN, INC.	Accounts Payable Check	124.46
177728	04/05/2024	RAINSCAPE, A LANDSCAPE SVC CO.	Accounts Payable Check	6,892.00
177729	04/05/2024	JERI RANGEL	Accounts Payable Check	300.00
177730	04/05/2024	BRIAN S. RICKS	Accounts Payable Check	60.00
177731	04/05/2024	CORBIN J. ROSSI	Accounts Payable Check	90.00
177732	04/05/2024	ALBERT SANUDO JR.	Accounts Payable Check	90.00
177733	04/05/2024	SCHAAF & WHEELER	Accounts Payable Check	2,212.50
177734	04/05/2024	SECURITAS TECHNOLOGY CORPORATN	Accounts Payable Check	824.22
177735	04/05/2024	CHAYSE L. SIMS	Accounts Payable Check	90.00
177736	04/05/2024	SITEONE LANDSCAPE SUPPLY, LLC	Accounts Payable Check	7,516.95
177737	04/05/2024	SLO COUNTY SHERIFF'S OFFICE	Accounts Payable Check	67.00
177738	04/05/2024	RANDY D. SMART, JR.	Accounts Payable Check	90.00
177739	04/05/2024	MARY P. SMITH	Accounts Payable Check	1,539.00
177740	04/05/2024	SPECIALIZED EQUIPMENT REPAIR	Accounts Payable Check	316.63

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Check Number	Check Date	Vendor	Description	Amount
177741	04/05/2024	JENNIFER L. SPOTTEN	Accounts Payable Check	759.00
177742	04/05/2024	SUNLIGHT JANITORIAL, INC.	Accounts Payable Check	1,650.00
177743	04/05/2024	SUPERION, LLC	Accounts Payable Check	45.00
177744	04/05/2024	MADELINE M. TAYLOR	Accounts Payable Check	184.50
177745	04/05/2024	CHRISTOPHER DANIEL THOMAS	Accounts Payable Check	120.00
177746	04/05/2024	T-MOBILE USA, INC.	Accounts Payable Check	125.00
177747	04/05/2024	KARL O. TOERGE	Accounts Payable Check	216.00
177748	04/05/2024	U.S. POSTMASTER	Accounts Payable Check	640.00
177749	04/05/2024	ULTREX BUSINESS PRODUCTS	Accounts Payable Check	52.05
177750	04/05/2024	VERIZON WIRELESS	Accounts Payable Check	2,810.47
177751	04/05/2024	VILLAGE ORIGINALS, INC.	Accounts Payable Check	35.00
177752	04/05/2024	VINO VICE, INC.	Accounts Payable Check	188.00
177753	04/05/2024	WEST COAST AUTO & TOWING, INC.	Accounts Payable Check	195.00
177754	04/05/2024	WICK'S ROOFING, INC.	Accounts Payable Check	2,900.00
177755	04/05/2024	KAREN B. WYKE	Accounts Payable Check	761.40
177756	04/05/2024	YOUTH EVOLUTION SOCCER	Accounts Payable Check	660.00
5112	04/10/2024	ANTHEM BLUE CROSS HSA	Payroll Vendor Payment	200.00
177758	04/10/2024	GIS BENEFITS	Payroll Vendor Payment	15,978.97
5113	04/11/2024	MCGRIFF INSURANCE SERVICE TRUIST INSURANCE HC	Payroll Vendor Payment	1,402.94
5114	04/11/2024	ANTHEM BLUE CROSS HSA	Payroll Vendor Payment	11,791.67
5115	04/11/2024	STATE DISBURSEMENT UNIT	Payroll Vendor Payment	283.84
177759	04/11/2024	ATASCADERO MID MGRS ORG UNION	Payroll Vendor Payment	40.00
177760	04/11/2024	ATASCADERO POLICE OFFICERS	Payroll Vendor Payment	2,326.75
177761	04/11/2024	ATASCADERO PROF. FIREFIGHTERS	Payroll Vendor Payment	1,151.80
177762	04/11/2024	EMPOWER ANNUITY INS CO	Payroll Vendor Payment	8,298.15
177763	04/11/2024	IAFF MERP	Payroll Vendor Payment	1,900.00
177764	04/11/2024	MISSIONSQUARE	Payroll Vendor Payment	8,668.71
177765	04/11/2024	NATIONWIDE RETIREMENT SOLUTION	Payroll Vendor Payment	692.26
177768	04/11/2024	GIS BENEFITS	Payroll Vendor Payment	16,071.57
177771	04/11/2024	GIS BENEFITS	Payroll Vendor Payment	15,763.15
5116	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	20,951.48
5117	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	36,345.34
5118	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,781.22
5119	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,837.45
5120	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	8,358.34
5121	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	11,405.46
5122	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	15,086.46
5123	04/12/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	26,515.19
5124	04/15/2024	SEIU LOCAL 620	Payroll Vendor Payment	874.63
5125	04/16/2024	RABOBANK, N.A.	Payroll Vendor Payment	88,549.60

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Check Number	Check Date	Vendor	Description	Amount
5126	04/16/2024	EMPLOYMENT DEV DEPARTMENT	Payroll Vendor Payment	29,991.61
5127	04/16/2024	EMPLOYMENT DEV. DEPARTMENT	Payroll Vendor Payment	3,155.22
177772	04/19/2024	2 MEXICANS, LLC	Accounts Payable Check	1,010.50
177773	04/19/2024	AK & COMPANY	Accounts Payable Check	3,250.00
177774	04/19/2024	ALL SIGNS AND GRAPHICS, INC.	Accounts Payable Check	162.34
177775	04/19/2024	ALLIANT INSURANCE SERVICES INC	Accounts Payable Check	150.00
177776	04/19/2024	ALPHA ELECTRIC SERVICE	Accounts Payable Check	882.50
177777	04/19/2024	ALTHOUSE & MEADE, INC.	Accounts Payable Check	668.56
177778	04/19/2024	ANTECH DIAGNOSTICS	Accounts Payable Check	180.21
177779	04/19/2024	KELLY AREBALO	Accounts Payable Check	701.44
177781	04/19/2024	AT&T	Accounts Payable Check	1,833.12
177782	04/19/2024	ATASCADERO DOOR COMPANY	Accounts Payable Check	239.25
177783	04/19/2024	ATASCADERO HAY & FEED	Accounts Payable Check	1,085.33
177784	04/19/2024	AURORA WORLD, INC.	Accounts Payable Check	1,141.67
177785	04/19/2024	AVILA TRAFFIC SAFETY	Accounts Payable Check	257.44
177786	04/19/2024	BASSETT'S CRICKET RANCH, INC.	Accounts Payable Check	208.81
177787	04/19/2024	BELL'S PLUMBING REPAIR, INC.	Accounts Payable Check	385.00
177788	04/19/2024	BERRY MAN, INC.	Accounts Payable Check	1,187.20
177789	04/19/2024	TERRI RECCHIA BLEDSOE	Accounts Payable Check	140.00
177790	04/19/2024	COOPER BONECK	Accounts Payable Check	102.00
177791	04/19/2024	BOUND TREE MEDICAL, LLC	Accounts Payable Check	86.04
177792	04/19/2024	BRENDLER JANITORIAL SERVICE	Accounts Payable Check	1,125.00
177793	04/19/2024	BREZDEN PEST CONTROL, INC.	Accounts Payable Check	70.00
177794	04/19/2024	BUSINESS ORIENTED SOFTWARE SOL	Accounts Payable Check	4,104.00
177795	04/19/2024	CA BUILDING STANDARDS COMM.	Accounts Payable Check	152.10
177796	04/19/2024	CA DEPT OF TAX AND FEE ADMIN.	Accounts Payable Check	3,930.00
177797	04/19/2024	CALPORTLAND COMPANY	Accounts Payable Check	1,441.89
177798	04/19/2024	CANNON	Accounts Payable Check	37,375.31
177799	04/19/2024	KRYSTAL CARLON	Accounts Payable Check	116.98
177800	04/19/2024	VICTORIA CARRANZA	Accounts Payable Check	345.44
177801	04/19/2024	VOID	Accounts Payable Check	0.00
177803	04/19/2024	CINTAS	Accounts Payable Check	1,598.27
177804	04/19/2024	KAREN A. CLANIN	Accounts Payable Check	294.00
177805	04/19/2024	CLEATH-HARRIS GEOLOGISTS, INC.	Accounts Payable Check	825.00
177806	04/19/2024	COLE FARMS, INC.	Accounts Payable Check	1,736.25
177807	04/19/2024	COOK'S COMMUNICATIONS CORP.	Accounts Payable Check	6,076.24
177808	04/19/2024	COPWARE, INC.	Accounts Payable Check	965.00
177809	04/19/2024	CRITICAL REACH, INC.	Accounts Payable Check	445.00
177810	04/19/2024	CRYSTAL SPRINGS WATER	Accounts Payable Check	20.00
177811	04/19/2024	CULLIGAN SANTA MARIA	Accounts Payable Check	331.73

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Check Number	Check Date	Vendor	Description	Amount
177812	04/19/2024	GREG C. CUNNINGHAM	Accounts Payable Check	60.00
177813	04/19/2024	DELTA LIQUID ENERGY	Accounts Payable Check	696.22
177814	04/19/2024	DEPARTMENT OF CONSERVATION	Accounts Payable Check	660.84
177815	04/19/2024	DEPARTMENT OF JUSTICE	Accounts Payable Check	985.00
177816	04/19/2024	EPIC IT SUPPORT	Accounts Payable Check	16,150.00
177817	04/19/2024	ESCROW CLEANING SERVICE	Accounts Payable Check	750.00
177818	04/19/2024	FAILSAFE TESTING, LLC	Accounts Payable Check	1,910.30
177819	04/19/2024	GAS COMPANY	Accounts Payable Check	2,126.26
177820	04/19/2024	GHS PARTS, INC.	Accounts Payable Check	256.87
177821	04/19/2024	GIERLICH-MITCHELL, INC.	Accounts Payable Check	24,579.07
177822	04/19/2024	GRANITE CONSTRUCTION, INC.	Accounts Payable Check	1,522.50
177823	04/19/2024	TRISTAN M. GUILLORY	Accounts Payable Check	90.00
177824	04/19/2024	KELLIE K. HART	Accounts Payable Check	163.80
177825	04/19/2024	BRETT HILDEBRAND	Accounts Payable Check	102.00
177826	04/19/2024	SETH W HUGHES	Accounts Payable Check	242.00
177827	04/19/2024	IMPACT PHOTOGRAPHICS, INC.	Accounts Payable Check	241.02
177828	04/19/2024	J. CARROLL CORPORATION	Accounts Payable Check	3,211.76
177829	04/19/2024	ZACHARIAH JACKSON	Accounts Payable Check	273.00
177830	04/19/2024	DILLON DEAN JAMES	Accounts Payable Check	627.94
177831	04/19/2024	JEFF & TONY'S DSD, LLC	Accounts Payable Check	686.40
177832	04/19/2024	JK'S UNLIMITED, INC.	Accounts Payable Check	165.00
177833	04/19/2024	TORI KEEN	Accounts Payable Check	85.15
177834	04/19/2024	KPRL 1230 AM	Accounts Payable Check	320.00
177835	04/19/2024	L.N. CURTIS & SONS	Accounts Payable Check	1,910.20
177836	04/19/2024	LAYNE LABORATORIES, INC.	Accounts Payable Check	2,139.11
177837	04/19/2024	LEE WILSON ELECTRIC CO. INC	Accounts Payable Check	1,428.00
177838	04/19/2024	JAMES R. LEWIS	Accounts Payable Check	348.26
177839	04/19/2024	LIFE ASSIST, INC.	Accounts Payable Check	271.83
177840	04/19/2024	LOLAS LETTERS CENTRL COAST LLC	Accounts Payable Check	820.00
177841	04/19/2024	MADRONE LANDSCAPES, INC.	Accounts Payable Check	385.00
177842	04/19/2024	MARBORG INDUSTRIES	Accounts Payable Check	73.05
177843	04/19/2024	MARIACHI VOCES TAPATIAS	Accounts Payable Check	2,250.00
177844	04/19/2024	MID-COAST MOWER & SAW, INC.	Accounts Payable Check	139.92
177845	04/19/2024	MIG	Accounts Payable Check	28,875.14
177846	04/19/2024	MILLER EVENT MANAGEMENT, INC.	Accounts Payable Check	1,080.00
177847	04/19/2024	MINER'S ACE HARDWARE	Accounts Payable Check	330.80
177848	04/19/2024	HEATHER MORENO	Accounts Payable Check	535.14
177849	04/19/2024	MARINA MOYA	Accounts Payable Check	67.66
177850	04/19/2024	NASSAU-SOSNICK DISTRIBUTION CO	Accounts Payable Check	309.18
177851	04/19/2024	NEW TIMES	Accounts Payable Check	407.00

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Check Number	Check Date	Vendor	Description	Amount
177852	04/19/2024	NORTH COAST ENGINEERING INC.	Accounts Payable Check	200.00
177853	04/19/2024	KENNETH OVIEDO	Accounts Payable Check	239.24
177854	04/19/2024	PACIFIC GAS AND ELECTRIC	Accounts Payable Check	33,129.95
177855	04/19/2024	PASO ROBLES FORD LINCOLN MERC	Accounts Payable Check	483.94
177856	04/19/2024	PLAYING WITH PLAYS, LLC	Accounts Payable Check	975.10
177857	04/19/2024	PORTER CONSTRUCTION, INC.	Accounts Payable Check	9,500.00
177858	04/19/2024	PRO TOW	Accounts Payable Check	470.00
177859	04/19/2024	PROCARE JANITORIAL SUPPLY, INC.	Accounts Payable Check	1,983.27
177860	04/19/2024	PROFORCE LAW ENFORCEMENT	Accounts Payable Check	1,458.01
177861	04/19/2024	RAINSCAPE, A LANDSCAPE SVC CO.	Accounts Payable Check	350.00
177862	04/19/2024	BRIAN S. RICKS	Accounts Payable Check	120.00
177863	04/19/2024	RODMAN REPAIR & FABRICATION	Accounts Payable Check	350.00
177864	04/19/2024	CORBIN J. ROSSI	Accounts Payable Check	150.00
177865	04/19/2024	SAN DIEGO POLICE EQUIPMENT CO	Accounts Payable Check	2,574.12
177866	04/19/2024	SANTA MARIA TIRE, INC.	Accounts Payable Check	3,008.07
177867	04/19/2024	ALBERT SANUDO JR.	Accounts Payable Check	120.00
177868	04/19/2024	SCHAAF & WHEELER	Accounts Payable Check	2,375.00
177869	04/19/2024	SCHINDLER ELEVATOR CORP	Accounts Payable Check	2,462.92
177870	04/19/2024	RANDY D. SMART, JR.	Accounts Payable Check	60.00
177871	04/19/2024	SO. BAY REG. PUBLIC SAFETY	Accounts Payable Check	462.04
177872	04/19/2024	SPEAKWRITE, LLC.	Accounts Payable Check	2,027.85
177873	04/19/2024	SPECIALIZED EQUIPMENT REPAIR	Accounts Payable Check	3,499.76
177874	04/19/2024	SPECIALIZED UTILITY SERVICES	Accounts Payable Check	7,625.00
177875	04/19/2024	STATE WATER RES CONTROL BOARD	Accounts Payable Check	704.00
177876	04/19/2024	STATE WATER RES CONTROL BOARD	Accounts Payable Check	548.00
177877	04/19/2024	TESCO CONTROLS, LLC	Accounts Payable Check	5,126.68
177878	04/19/2024	THOMSON REUTERS - WEST	Accounts Payable Check	212.09
177879	04/19/2024	T-MOBILE USA, INC.	Accounts Payable Check	100.00
177880	04/19/2024	TOWNSEND PUBLIC AFFAIRS, INC.	Accounts Payable Check	4,000.00
177887	04/19/2024	U.S. BANK	Accounts Payable Check	50,852.49
177888	04/19/2024	UNITED STAFFING ASSC., INC.	Accounts Payable Check	2,918.52
177889	04/19/2024	UNIVAR SOLUTIONS USA, INC.	Accounts Payable Check	8,155.68
177890	04/19/2024	UPSTREAM H2O LLC	Accounts Payable Check	2,000.00
177891	04/19/2024	DAVID VAN SON	Accounts Payable Check	240.00
177892	04/19/2024	VERDIN	Accounts Payable Check	44,494.90
177893	04/19/2024	VERIZON WIRELESS	Accounts Payable Check	389.19
177894	04/19/2024	VISIT SLO CAL	Accounts Payable Check	300.00
177895	04/19/2024	WEST COAST AUTO & TOWING, INC.	Accounts Payable Check	270.00
177896	04/19/2024	GARRETT WILLIAMS	Accounts Payable Check	218.74
177897	04/19/2024	YEH AND ASSOCIATES, INC.	Accounts Payable Check	2,842.20

City of Atascadero
Disbursement Listing
 For the Month of April 2024

<u>Check Number</u>	<u>Check Date</u>	<u>Vendor</u>	<u>Description</u>	<u>Amount</u>
5128	04/25/2024	MCGRIFF INSURANCE SERVICE TRUIST INSURANCE HC	Payroll Vendor Payment	1,402.94
5129	04/25/2024	ANTHEM BLUE CROSS HSA	Payroll Vendor Payment	11,791.67
177898	04/25/2024	ATASCADERO MID MGRS ORG UNION	Payroll Vendor Payment	40.00
177899	04/25/2024	ATASCADERO POLICE OFFICERS	Payroll Vendor Payment	2,326.75
177900	04/25/2024	ATASCADERO PROF. FIREFIGHTERS	Payroll Vendor Payment	1,151.80
177901	04/25/2024	EMPOWER ANNUITY INS CO	Payroll Vendor Payment	8,286.09
177902	04/25/2024	IAFF MERP	Payroll Vendor Payment	1,900.00
177903	04/25/2024	MISSIONSQUARE	Payroll Vendor Payment	8,799.41
177904	04/25/2024	NATIONWIDE RETIREMENT SOLUTION	Payroll Vendor Payment	819.83
5130	04/26/2024	STATE DISBURSEMENT UNIT	Payroll Vendor Payment	283.84
5131	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	20,294.04
5132	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	35,334.42
5133	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,756.82
5134	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,837.45
5135	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	8,358.34
5136	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	11,312.46
5137	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	16,195.90
5138	04/29/2024	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	27,399.92
5139	04/29/2024	SEIU LOCAL 620	Payroll Vendor Payment	875.72
5140	04/30/2024	RABOBANK, N.A.	Payroll Vendor Payment	68,987.36
5141	04/30/2024	EMPLOYMENT DEV DEPARTMENT	Payroll Vendor Payment	21,141.13
5142	04/30/2024	EMPLOYMENT DEV. DEPARTMENT	Payroll Vendor Payment	3,208.16
				\$ 1,627,165.80



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A3

Department: Administrative Services
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER
FROM: JERI RANGEL, DIRECTOR OF ADMINISTRATIVE SERVICES
PREPARED BY: DAWN PATTERSON, ACCOUNTING SPECIALIST
SUBJECT: Apple Valley Assessment Districts

RECOMMENDATION:

Council:

1. Adopt Draft Resolution A, initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025.
2. Adopt Draft Resolution B, accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley).
3. Adopt Draft Resolution C, declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters.
4. Adopt Draft Resolution D, initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code.
5. Adopt Draft Resolution E, for preliminary approval of the Annual Engineer's Levy Report for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025.
6. Adopt Draft Resolution F, declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025.

REPORT IN BRIEF:

Adoption of the annual Draft Resolutions A-F declaring the City's intention to levy and collect assessments for fiscal year 2024/2025 for the Apple Valley Street and Storm Drain Maintenance and the Landscaping and Lighting Maintenance Districts.

DISCUSSION:

The City Council formed and began assessing Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) in 2005. This district was formed to provide funding for future routine maintenance of the streets, storm drains and sidewalks in the Apple Valley subdivision.

The City Council also formed and began assessing Atascadero Landscape and Lighting Maintenance District No. 01 (Apple Valley) in 2005. This district was formed to provide for funding and maintenance of street trees, open space, park area, medians, walkways, paths and other landscape and lighting improvements within the Apple Valley subdivision.

NBS, an independent financial consultant, was hired to prepare the engineer’s report for the two districts. The engineer’s report and the levies must be approved by Council annually. This is done in a two-step process. Tonight, there are three resolutions for each district (a total of 6 resolutions in all) that must be passed in order to continue the assessments within the districts. The resolutions passed tonight will also establish the date and time for the public hearing. The public hearing is tentatively scheduled for June 25, 2024 at 6:00 p.m., at which time the final resolutions will be presented to the Council for consideration.

The proposed assessments for fiscal year 2024/2025 are less than the Maximum Assessment Rate. In accordance with the formula voters of the district adopted in 2005, the Maximum Assessment Rate may be increased for inflation by the greater of the Consumer Price Index (CPI) or 3.0%. The Maximum Assessment Rate was increased 3% (CPI) this year for both districts.

An Assessment Information Notice was mailed to all property owners on April 22, 2024. The notice provided the date of the upcoming June 25, 2024 Public Hearing, information on how to participate in the meeting, staff contact information, and the proposed and current levies for both districts.

Staff has reviewed the short and long-term costs to maintain the districts and recommends the total cost of both districts of \$1,450 remains flat when compared to the prior year. The Landscaping and Lighting District levy is about 44% of the allowable maximum annual assessment and the Street and Storm Drain District is about 59% of the allowable maximum annual assessment.

District	Amount Per EBU Assessment Fiscal Year 2023-24	Amount Per EBU Proposed Assessment Fiscal Year 2024-25
Atascadero Street and Storm Drain Maintenance District No. 01 Apple Valley	\$ 550.00	\$ 550.00
Atascadero Landscaping and Lighting Maintenance District No. 01 Apple Valley	\$ 900.00	\$ 900.00

The levies for fiscal year 2024/2025 are proposed with no increases and reserves are sufficient for now; however, staff predicts that the Landscape and Lighting District will likely see future increased costs due to the aging landscape, increases in utilities (water and electricity), and increases in labor costs for the landscape maintenance contractor.

City staff works to maximize efficiencies and minimize levy increases. However, modest levy increases are expected in future years in order to continue providing the existing service levels.

FISCAL IMPACT:

Annual assessments for 2024/2025 will total \$38,500 for road/drainage system maintenance and \$63,000 for landscape and lighting maintenance. These amounts will be assessed to the owners of parcels in Apple Valley. Contributions of \$11,000 for half the cost of the park will be made from the City's General Fund, and an equal revenue source will be recognized from contributions made by the developer.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. **Draft Resolution A** - initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025
2. **Draft Resolution B** - accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley)
3. **Draft Resolution C** - declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters
4. **Engineer's Annual Levy Report** - for the levy and collection of fiscal year 2024/2025 assessments for Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley)
5. **Draft Resolution D** - initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code
6. **Draft Resolution E** - preliminary approval of the Annual Engineer's Levy Report for Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025
7. **Draft Resolution F** - declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) for fiscal year 2024/2025
8. **Engineer's Annual Levy Report** - for the levy and collection of fiscal year 2024/2025 assessments for Atascadero Landscaping and Lighting District No. 01 (Apple Valley)

DRAFT RESOLUTION A

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, INITIATING PROCEEDINGS FOR THE LEVY AND COLLECTION OF ANNUAL ASSESSMENTS FOR ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 01 (APPLE VALLEY) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”) formed an assessment district to be designated as Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) (hereafter referred to as the “District”), for the purpose of funding the ongoing operation, maintenance and servicing of public streets, sidewalks, storm drain and flood control facilities installed in conjunction with the development of properties known as Apple Valley Tract 2495; and to levy and collect annual assessments related thereto. The 1982 Act provides for the formation of such an assessment district pursuant to *Article 3 Section 54710*, and provides for the levy and collection of assessments by the County on behalf of the City pursuant to *Article 4 Section 54718*; and

WHEREAS, the City Council has retained NBS as the Engineer of Work, for the purpose of assisting with the administration of the District, the establishment of annual assessments, and to prepare and file an Engineer’s Report with the City Clerk in accordance with the 1982 Act; and in accordance with the requirements of the *California Constitution, Articles XIII C and XIII D*.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The City Council hereby orders the Engineer to prepare and file an Engineer’s Annual Levy Report concerning the levy of assessments for properties within the District as specified by *Article 4 Section 54716* of the 1982 Act.

SECTION 2. The District improvements include the ongoing operation, administration, maintenance and servicing of the public streets, drainage and flood control systems and appurtenant facilities authorized pursuant to the 1982 Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to pavement, curbs, sidewalks, hardscape, bridges, fencing, signage, drains, pipes, inlets, outlets, catch basins, drainage basins, manholes, and associated appurtenant facilities located within the public street rights-of-way and other public easements within the District, and dedicated to the City of Atascadero for such maintenance.

SECTION 3. The territory within Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) consists of lots, parcels and subdivisions of land located in the development known as Apple Valley Tract 2495.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION B

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, ACCEPTING AND PRELIMINARILY APPROVING THE ENGINEER'S ANNUAL LEVY REPORT REGARDING THE ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 01 (APPLE VALLEY)

The City Council of the City of Atascadero (hereafter referred to as "City Council") hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council has, by previous Resolution, ordered the preparation of an Engineer's Annual Levy Report (hereafter referred to as the "Report") regarding the assessment district to be designated as the Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) (hereafter referred to as the "District"), and the levy and collection of assessments related thereto, pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the "1982 Act"); and

WHEREAS, there has now been presented to this City Council the Report as specified by *Article 4 Section 54716* of said 1982 Act; and

WHEREAS, the City Council has carefully examined and reviewed the Report as presented, and is preliminarily satisfied with the District and the budget items and documents as set forth therein, and is satisfied that the proposed assessments have been spread in accordance with the special benefits received from the improvements, operation, administration, maintenance and services to be performed within the District, as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The preceding recitals are true and correct.

SECTION 2. That the Report as presented, consists of the following:

- a. A Description of Improvements.
- b. A Boundary Diagram of the District.
- c. The Method of Apportionment that details the method of calculating each parcel's proportional special benefits and annual assessment.
- d. The proposed Budget (Costs and Expenses) and the duration and collection of assessments.
- e. The District Roll containing the Levy for each Assessor Parcel Number within the District for fiscal year 2024/2025.

SECTION 3. The Report is hereby approved on a preliminary basis and ordered to be filed in the Office of the City Clerk as a permanent record and to remain open to public inspection.

SECTION 4. The Maximum Assessment described in the Report is hereby approved on a preliminary basis.

SECTION 5. The City Clerk shall certify to the passage and adoption of this Resolution, and the Minutes of this meeting shall so reflect the presentation of the Report.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION C

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AND COLLECT ANNUAL ASSESSMENTS WITHIN ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 01 (APPLE VALLEY) IN FISCAL YEAR 2024/2025, AND TO APPOINT A TIME AND PLACE FOR THE PUBLIC HEARING ON THESE MATTERS

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”) did by previous Resolution approve the levy and collection of annual assessments to pay for the operation, maintenance and servicing of public streets, drainage and flood control systems and appurtenant facilities related thereto for the assessment district designated as Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) (hereafter referred to as the “District”); and

WHEREAS, the Engineer selected by the City Council has prepared and filed with the City Clerk a Report in connection with the proposed District, and the levy of assessments for Fiscal Year 2024/2025 (July 1, 2024 and ending June 30, 2025) in accordance with *Chapter 1, Article 4* of the 1982 Act and in accordance with the requirements of the *California Constitution, Articles XIIC and XIID*, and the City Council did by previous Resolution preliminarily approve such Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The City Council hereby declares its intention to seek the annual levy of the District pursuant to the 1982 Act, over and including the land within the District boundary, and to levy and collect special benefit assessments on parcels of land within the District to pay for the costs and expenses associated with the operation, maintenance, repair and servicing of public streets, drainage and flood control systems and appurtenant facilities related thereto.

SECTION 2. The District improvements include the ongoing operation, administration, maintenance and servicing of the public streets, drainage and flood control systems and appurtenant facilities authorized pursuant to the 1982 Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to pavement, curbs, sidewalks, hardscape, bridges, fencing, signage, drains, pipes, inlets, outlets, catch basins, drainage basins, manholes, and associated appurtenant facilities located within the public street rights-of-way and other public easements within the District, and dedicated to the City of Atascadero for such maintenance. The Engineer’s Report, as ordered by previous Resolution, provides a full and complete description of the improvements within the District.

SECTION 3. The proposed territory within Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) consists of lots, parcels and subdivisions of land located in the development known as Apple Valley Tract 2495.

SECTION 4. The proposed assessments for the District are outlined in the Engineer’s Report. The Report details the proposed assessments necessary to provide for the annual operation, administration, services and maintenance of the improvements described in Section 2 of this Resolution.

SECTION 5. Notice is hereby given that a Public Hearing on these matters will be held by the City Council on Tuesday, June 25, 2024, at 6:00 p.m. or as soon thereafter as feasible in the regular meeting chambers of the City Council located at 6500 Palma Avenue, Atascadero, California. At the Public Hearing, all interested persons shall be given an opportunity to hear and be heard on the proposed assessment to be levied for fiscal year 2024/2025 as contained in the Engineer’s Report on file in the City Clerk’s Office.

SECTION 6. The City Clerk shall give notice of the filing of the report and the time and place of the Public Hearing by publishing in a local newspaper one time at least 10 days prior to the Public Hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

CITY OF ATASCADERO

Fiscal Year 2024/25 Engineer's Report

Street and Storm Drain Maintenance District No. 01 (Apple Valley)

May 2024

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

CITY OF ATASCADERO
Street and Storm Drain Maintenance District No. 01
(Apple Valley)

6500 Palma Avenue
Atascadero, CA 93422
Phone – (805) 461-5000
Fax – (805) 461-7612

CITY COUNCIL

Heather Moreno, Mayor

Susan Funk, Mayor Pro Tem

Charles Bourbeau, Council Member

Mark Dariz, Council Member

Heather Newsom, Council Member

AGENCY STAFF

Jim Lewis, City Manager

Jeri Rangel, Administrative Services Director

Cindy Chavez, Deputy Director of Administrative Services

NBS

Tim Seufert, Client Services Director

Adina McCargo, Project Manager

Danielle Robison, Administrator

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1. ENGINEER’S LETTER

WHEREAS, on March 24, 2005 by Resolution No. 2005-042, the City Council of the City of Atascadero (the "City"), State of California, in accordance with and pursuant to the provisions of the Benefit Assessment Act of 1982, being Chapter 6.4 of the California Government Code, commencing with Section 54703 (hereafter referred to as the "1982 Act"), and in compliance with the substantive and procedural requirements of the California State Constitution Article XIID (hereafter referred to as the "California Constitution"), established the City of Atascadero Street and Storm Drain Maintenance District No. 01 (Apple Valley) (the "District"); and

WHEREAS, on May 28, 2024, the City Council, adopted its Resolution Initiating Proceedings for the Annual Levy of Assessments and Ordering the Preparation of an Engineer’s Report for the District; and

WHEREAS, the Resolution Initiating Proceedings directed NBS to prepare and file a report describing the general nature, location, and extent of the improvements to be maintained; an estimate of the costs of the maintenance, operations, and servicing of the improvements for the District for the referenced fiscal year; a diagram for the District, showing the area and properties to be assessed; and an assessment of the estimated costs of the administration, maintenance, operations, and servicing the improvements, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

NOW THEREFORE, the assessments as detailed in this Engineer’s Report and as summarized in the table below are made to cover the portion of the estimated costs of maintenance, operation and servicing of the improvements to be paid by the assessable real property within the District in proportion to the special benefit received. The following table summarizes the proposed assessment for Fiscal Year 2024/25:

FY 2024/25 Summary of Assessment

Description	Amount
Estimated Annual Costs	\$22,640
Capital Reserve Collection/(Uses)	24,090
Levy Adjustments	(8,230)
Balance to Levy	\$38,500
Fiscal Year 2024/25 Maximum Rate	\$926.69
Fiscal Year 2024/25 Proposed Applied Rate	\$550.00

I, the undersigned, respectfully submit the enclosed Engineer’s Report and, to the best of my knowledge, information, and belief, the Engineer’s Report, Assessments, and the Assessment Diagram herein have been prepared, computed, and levied in accordance with the assessment methodology adopted, approved, and ordered by the City Council of the City of Atascadero and the 1982 Act.

City Engineer



2. EXECUTIVE SUMMARY

Pursuant to the provisions of the *Benefit Assessment Act of 1982, being Chapter 6.4 of the California Government Code, commencing with Section 54703* (hereafter referred to as the “1982 Act”), and in compliance with the substantive and procedural requirements of the *California State Constitution Article XIII D* (hereafter referred to as the “California Constitution”), the City Council of the City of Atascadero, County of San Luis Obispo, State of California (hereafter referred to as “City”), proposed to form and levy special benefit assessments for the district designated as:

Street and Storm Drain Maintenance District No. 01 (Apple Valley)

(hereafter referred to as the “District”), which includes the lots and parcels of land within the residential subdivision known as Apple Valley, Tract 2495 within the City limits of the City. This Engineer’s Report (hereafter referred to as the “Report”) has been prepared in connection with the levy and collection of annual assessments related thereto for Fiscal Year 2024/25.

The City Council formed the District and provided for the levy and collection of annual assessments on the County tax rolls to provide ongoing funding for the costs and expenses required to service and maintain the street and storm drain improvements and facilities associated with and resulting from the development of properties within the District. The improvements to be provided by the District and the assessments described herein are made pursuant to the 1982 Act and the substantive and procedural provisions of the California Constitution.

This Report describes the District, the improvements, and the proposed assessments to be levied against properties in connection with the special benefits the properties will receive from the maintenance and servicing of the District improvements and facilities. The annual assessments described herein will provide a funding source for the continued operation and maintenance of streets, storm drain system, and appurtenant facilities installed in connection with the development of properties within the District.

The improvements and assessments described in this Report are based on the development of properties within the District and represent an estimate of the direct expenditures, incidental expenses, and fund balances that will be necessary to maintain and service the streets and storm drain system that provides special benefits to properties within the District. The structure of the District (organization), the improvements, the method of apportionment, and assessments described herein are based on current development plans and specifications for Tract 2495; and by reference these plans and specifications are made part of this Report.

The word “parcel,” for the purposes of this Report, refers to an individual property assigned its own Assessor’s Parcel Number (APN) by the San Luis Obispo County Assessor’s Office. The San Luis Obispo County Auditor/Controller uses Assessor’s Parcel Numbers and specific Fund Numbers to identify properties to be assessed on the tax roll for the special benefit assessments.

As part of this District’s formation, the City conducted a Property Owner Protest Ballot proceeding for the proposed levy of a new assessment pursuant to the provisions of the *California Constitution, Article XIII D Section 4*. In conjunction with this ballot proceeding, the City Council conducted a noticed public hearing to



consider public testimonies, comments, and written protests regarding the formation of the District and levy of assessments. Upon conclusion of the public hearing, property owner protest ballots received were opened and tabulated to determine whether majority protest existed (ballots were weighted based on assessment amounts), and by resolution the City Council confirmed the results of the ballot tabulation. The tabulation of the ballots indicated that majority protest did not exist for the proposed assessments and the assessment range formula presented and described herein; therefore, the City Council approved the Report (as submitted or amended), ordered the formation of the District, and approved the levy and collection of assessments. The assessments for Fiscal Year 2005/2006 were submitted to the San Luis Obispo County Auditor/Controller for inclusion on the property tax roll for each parcel.

Each subsequent fiscal year, a Report shall be prepared and presented to the City Council describing any changes to the improvements, proposed services, the annual budget or assessments for that fiscal year and the City Council may hold a noticed public hearing regarding these matters prior to approving and ordering the proposed levy of assessments. If the proposed assessments for the District exceed the maximum assessment described herein (as approved by the property owners), the new or increased assessment must be confirmed through another property owner protest ballot proceeding before such an assessment may be imposed. It should be noted that an increased assessment to an individual property resulting from changes in development or land use does not constitute an increased assessment.

3. PLANS AND SPECIFICATIONS

3.1 Benefiting Properties within the District

The territory within the District consists of the lots, parcels, and subdivisions of land within the proposed residential subdivision known as the Apple Valley, Tract 2495, which encompasses an area of land totaling approximately twenty-eight acres (27.71 acres).

This residential subdivision includes seventy (70) single-family residential homes. The subdivision is situated in the northern portion of the City just southwest of Highway 101 and is generally located:

- South of Del Rio Road;
- North of Conejo Road;
- West of Ramona Road; and,
- East of Graves Creek.

3.2 Funding Authorized by the 1982 Act

As generally defined by the 1982 Act and applicable to this District, the City may impose a benefit assessment to finance the maintenance and operation costs of the following services:

- Drainage and Flood Control;
- Streets and Roads.

In addition to imposing a benefit assessment for the annual maintenance and operation of the District improvements, the City may also authorize an assessment or utilize existing assessment revenues to finance the installation, construction, or replacement of drainage and flood control facilities as well as the street and road improvements (with some limitations). While such activities are permitted under the 1982 Act, the budget and assessments for this District only provide for normal maintenance and operation of the improvements. Since most major rehabilitation/construction projects result from unforeseen damages, the extent and cost of such projects are not easily predicted and to accumulate funds as part of the normal annual assessments would not be reasonable. If such funding becomes necessary, the City may present a new or increased assessment to the property owners to support the projects.

3.3 Description of Improvements and Services

The purpose of this District is to fund the activities necessary to maintain and service the local streets and the drainage and flood control systems constructed and installed in connection with development of properties within the residential subdivision known as Apple Valley, Tract 2495 pursuant to approved development plans and agreements. The improvements may consist of all or a portion of the public streets, drainage and flood control facilities associated with Tract 2495 and the maintenance of these improvements may include but are not limited to the materials, equipment, labor, and incidental expenses deemed necessary to keep these improvements in satisfactory condition.

The maintenance of the improvements and related activities shall be funded entirely or partially through the District assessments. The District improvements and services are generally described as:

- Street maintenance that may include but is not limited to the repair and servicing of street surfaces, curbs, gutters, bridges, driveway approaches, sidewalks, barricades, delineation, signage, or other facilities within the public street rights-of-way installed in connection with the development of properties in Tract 2495 and that have been dedicated to the City;
- Storm drain and flood control maintenance that may include but is not limited to inspection, repair and servicing of drainage basins, inlets, catch basins, manholes, outlets, drywells, pumps, filters, and storm drain pipes installed in connection with the development of properties of Tract 2495 as well as any off-site improvements and facilities directly associated with the aforementioned infrastructure that is deemed necessary to service or protect the properties including waste water treatment;
- The appurtenant, equipment, materials, and service contracts related to the aforementioned improvements and facilities;
- Specifically excluded are those improvements or facilities: located on private property or common areas; that may be provided or maintained by an agency other than the City; that may be provided by another assessment or tax levied by the City; or that may be provided and maintained by a Homeowner’s Association or similar entity.

Detailed maps and descriptions of the location and extent of the specific improvements to be maintained by the District are on file in the Office of Public Works and by reference are made part of this Report. Those portions of the District improvements that may be identified as general benefit or will be funded in whole or in part by other revenue sources as part of the approved development agreements, will not be included as part of the District assessments. The net annual cost to provide and maintain the improvements determined to be of special benefit shall be allocated to each property in proportion to the special benefits received.

3.3.1 STREET MAINTENANCE

The street maintenance program may include but is not limited to: the repair of potholes, cracks, or other failures in the asphalt surface; repair or replacement of curbs, gutters, driveway approaches, and sidewalks as required as part of maintaining the streets; repair or installation of street signs, barricades, fencing, or other delineation; mechanized sweeping and cleaning of the streets and gutters; slurry sealing, overlays, and re-striping of the street surfaces. The specific activities and timing of various street and road maintenance services shall be determined by the City’s Public Works Department as necessary to extend the life of the streets or to improve traffic circulation and safety as available funding permits. Specifically, the street improvements for this District are identified as:

- Approximately 106,460 square feet of asphalt street surface located on the perimeter of the development (south half of Del Rio Road); and the various interior streets identified as Via Colonia Court, San Ramon Road, Via Huerto Court, Avenida Manzana, and San Ramon Road.



- Approximately 5,320 linear feet of curb and gutter along Del Rio Road, Via Colonia Court, San Ramon Road, Via Huerto Court, Avenida Manzana, San Ramon Road, and Conejo Road;
- Approximately 3,545 square feet of decorative street pavers and 1,254 linear feet of curb and gutter in and around the two median islands on San Ramon Road (entryways to the development at Del Rio Road and Conejo Road);
- Approximately 70 driveway approaches, 25,394 square feet of sidewalks and various street signs within the District;
- Specifically, not included as part of the street maintenance program are the costs associated with major replacements or reconstruction. Although the District assessments will provide funding for regular maintenance and servicing of the improvements that will extend the useful life of the street improvements, the assessments are not intended to fund major replacements or reconstruction of the street surfaces or adjacent improvements such as curbs, gutters, or driveway approaches. The costs of extensive replacement or reconstruction activities such as grinding and resurfacing of the asphalt; and replacement of curbs, gutters, driveway approaches, and sidewalks is significantly more than the amount that can reasonably be collected annually under the provisions of the 1982 Act. When such repairs or activities are deemed necessary, the City will consider various financing options including new or increased assessments for property owner approval.

The Public Works Department shall authorize the operational activities and maintenance of the public street and right-of-way improvements, facilities, and services that may include, but are not limited to:

- Regular street sweeping services necessary to control dirt and debris on street surfaces and gutters;
- Annual inspection of street surface and repair of potholes and surface cracks as needed;
- Periodic slurry or overly of street surfaces and driveway approaches (typically one or the other once every five years);
- Periodic re-striping of traffic lanes, bike lanes, street parking areas, crosswalks, and intersections (typically in conjunction with slurry or overly activities);
- Graffiti abatement of public improvements within the street rights-of-way that are maintained by the District including but not limited to sandblasting, repainting and repair of fences, walls, barricades, sidewalks, and signage as needed;
- Annual inspection and periodic repair or replacement of decorative street- pavers as needed;
- Annual inspection and minor repairs of curbs, gutters, driveway approaches, and sidewalks including partial segment replacements as needed to ensure pedestrian and vehicle safety or the integrity of the street;
- Annual inspection and periodic repair or rehabilitation of street signs and traffic control devices;
- Annual inspection and repair of barricades, street-fencing, delineation or retaining walls within the street rights-of-way as needed.



A portion of the services described above are not performed on an annual basis but rather on a periodic basis, such as slurry sealing or overlaying the asphalt streets, and the funds necessary for these activities are collected in installments as part of the annual assessments. The monies collected each year for these services will be accumulated in a special fund of the District (Reserve Fund or Capital Improvement Fund). The monies accumulated for these activities shall be spent when sufficient funds have been accumulated to perform the services deemed necessary by the City (approximately every five years). This process of accumulating funds (installments) shall continue until such time the District is dissolved; or the City determines that such funding procedures require modification. Changes in the process of accumulating funds that would result in an increase to the annual assessment rate must be presented to the property owners for approval prior to imposing such an increase.

3.3.2 STORM DRAIN AND FLOOD CONTROL MAINTENANCE

The storm drain and flood control system associated with the District may include but is not limited to: drainage basins and bio-filters; channel ways; storm drain inlets, catch basins, manholes, outlets; drywells, pumps, filters and pipes. The storm drain system to be maintained primarily involves on-site facilities (within the District boundaries) but may also include off-site improvements such as water treatment equipment, facilities or services mandated or required by Federal, State, or County regulations for water pollution control. The annual assessments for this District are intended to support a storm drain and flood control maintenance program that will adequately regulate and control storm water runoff resulting from the development of properties within the District. This maintenance program may include but is not limited to: inspection and documentation of the system; cleaning, servicing, or repair of the facilities and equipment; and the partial replacement or rehabilitation of equipment and facilities. The storm drain and flood control system includes but is not limited to:

- Approximately 30,050 square feet of drainage basin area;
- Twenty-eight (28) inlets, outlets, and manholes located throughout Tract 2495;
- Approximately 2,100 linear feet of storm drain pipe ranging from 18 inches to 42 inches in diameter.

The Public Works Department shall authorize and schedule the operational activities and maintenance of the storm drain and storm water pollution treatment infrastructure, facilities, and services that may include, but are not limited to:

- Cleaning of storm drain inlets, catch basins, manholes, and pipes as needed;
 - Stencil maintenance and documentation of facilities as required by Federal, State, or County regulations;
 - Cleaning and landscape maintenance of the drainage basins, bio-filter areas or channel ways as needed;
 - Debris removal and pest control in and around the storm drain facilities as needed;
 - Minor repairs and maintenance of the storm drain inlets, catch basins, and outlets as needed;
 - Street sweeping services necessary to control debris and water flow for the storm drain system;
- and,



- The operational costs related to NPDES compliance requirements.

A portion of the services described above are not performed on an annual basis but rather on a periodic basis such as minor repairs to the storm drain inlets, catch basins, and outlets, and the funds necessary for these activities are collected in installments as part of the annual assessments. The monies collected each year for these services will be accumulated in a special fund of the District (Reserve Fund or Capital Improvement Fund). The monies accumulated for these activities shall be spent as needed to perform the services deemed necessary by the City. This process of accumulating funds (installments) shall continue until such time the District is dissolved; or the City determines that such funding procedures require modification. Changes in the process of accumulating funds that would result in an increase to the annual assessment rate must be presented to the property owners for approval prior to imposing such an increase.

4. ESTIMATE OF COSTS

Budget	2024/2025 Assessment
DIRECT COSTS	
Streets, Roads & Storm Drain Improvements	
Street Maintenance	\$8,600
Inspection & Operational Services - Roads, Drainage	8,000
Traffic Sign Replacement	0
Total Annual Direct Costs	\$16,600
ADMINISTRATION EXPENSES	
City Annual Administration	\$1,950
Engineer's Report & Services	3,890
Public Noticing	200
Total Annual Administration Costs	\$6,040
TOTAL DIRECT & ADMINISTRATION COSTS	\$22,640
CAPITAL RESERVE COLLECTIONS/(USES)	
Collection for Street Surface Activities	\$21,800
Collection Street Re-striping	80
Collection for Repair Activities: Curbs, Gutters, Approaches & Sidewalks	850
Collection for Debris Removal	380
Collection for Storm Drain Fencing	380
Collection for Storm Drain Infrastructure	600
Total Annual Capital Reserve Collections/(Uses)	\$24,090
LEVY ADJUSTMENTS	
Interest Income - Improvement Fund	(\$16,691)
Interest Income - Operating Reserve Fund	(429)
Reserve Fund Collection/(Use)	8,890
Total Levy Adjustments	(\$8,230)
BALANCE TO LEVY	\$38,500
DISTRICT STATISTICS	
Total Parcels	74
Parcels Levied	70
Total EBU ⁽¹⁾	70
Levy per EBU	\$550.00
Maximum Levy per EBU	\$926.69
FUND BALANCE INFORMATION	
Beginning Operating Reserve Balance	\$14,287
Operational Reserve Interest	429
Surplus Transfer from Improvement Fund	8,230
Operational Reserve Collection (Use)	(\$8,230)
Estimated Ending Operating Reserve Balance	\$14,716
Beginning Improvement Fund Balance	\$539,733
Improvement Fund Interest	16,691
Surplus Transfer to Operations Fund	(\$8,230)
Improvement Fund Collection/(Use)	24,090
Estimated Ending Improvement Fund Balance	\$572,284

⁽¹⁾ Levy per EBU rate does not include the County of San Luis Obispo fee of \$2.00 per parcel



5. METHOD OF ASSESSMENT

5.1 General

The 1982 Act permits the establishment of assessment districts by agencies for the purpose of providing for the maintenance, operation, and servicing of drainage and flood control improvements as well as streets, roads, and appurtenant facilities. The 1982 Act further requires that the cost of these improvements be levied according to benefit rather than assessed value:

“The amount of the assessment imposed on any parcel of property shall be related to the benefit to the parcel which will be derived from the provision of the service”.

Furthermore:

“The annual aggregate amount of the assessment shall not exceed the estimated annual cost of providing the service, except that the legislative body may, by resolution, determine that the estimated cost of work authorized ... is greater than can be conveniently raised from a single annual assessment and order that the estimated cost shall be raised by an assessment levied and collected in installments.... The revenue derived from the assessment shall not be used to pay the cost of any service other than the service for which the assessment was levied.”

The method of apportionment described in this Report for allocation of special benefit assessments utilizes commonly accepted engineering practices in compliance with the provisions of the 1982 Act and the California Constitution. The formulas used for calculating assessments reflects the composition of parcels within the District and the improvements and services provided, to fairly apportion the costs based on the special benefits to each parcel.

5.2 Benefit Analysis

Each of the proposed improvements and services, and the associated costs and assessments have been carefully reviewed, identified and allocated based on special benefit pursuant to the provisions of the 1982 Act and the California Constitution. The street and storm drain improvements associated with this District were necessary and essential requirements for the orderly development of the properties within the District to their full potential, consistent with the development plans and applicable portions of the City’s General Plan. As such the ongoing operation, servicing, and maintenance of those improvements would otherwise be the direct financial obligation of each individual property owner. Since each parcel to be assessed within the District could not have been developed in the absence of these improvements and facilities, each parcel has a direct investment in the proper maintenance of the improvements that is over and above any general benefits that may be conferred by such improvements and services.

The ongoing maintenance and servicing of the District improvements is an integral part of the appearance, use and preservation of the properties within the District and such services to be funded by annual assessments confer a particular and distinct special benefit to those parcels. The proper maintenance of streets and appurtenant facilities allows individual parcels to be used to their fullest extent by ensuring the safe and

efficient movement of people and goods to and from the benefiting properties. Likewise, the maintenance and servicing of the storm drain system ensures proper water flow and control of excess water during periods of rain, which is essential to preservation and protection of private property. Together the maintenance and servicing of the streets and storm drain system contributes to a specific enhancement of each of the parcels within the District and the absence of adequate maintenance and servicing of the District improvements could eventually have a negative impact on properties within the District.

Although the improvements may include public streets and storm drain facilities that connect to similar facilities outside the District boundaries, it is clear that the construction and installation of these improvements were only necessary for the development of properties within the District. As such, these improvements were not required nor necessarily desired by any properties or developments outside the District boundary and any public access or use of the improvements by others is incidental. Therefore, it has been determined that the ongoing maintenance, servicing and operation of the District improvements provide no measurable general benefit to properties outside the District or to the public at large, but clearly provide distinct and special benefits to properties within the District. Any improvement or portion thereof (particularly off-site storm drain facilities) that may be considered general benefit shall be funded by other revenue sources and not included as part of the special benefit assessments allocated to properties within this District. However, the costs associated with installation or improvement of any off-site facilities that benefit the parcels within this District as well as other properties (shared benefit) may be allocated to the parcels within the District based on their proportional special benefit from such improvements.

5.3 Assessment Methodology

The costs associated with the improvements and services shall be fairly distributed among the parcels based upon the special benefit received by each parcel. Additionally, in compliance with the California Constitution Article XIII D Section 4, each parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred to that parcel. The benefit formula used to determine the assessment obligation is therefore based upon both the improvements that benefit the parcels within the District as well as the proposed land use of each property as compared to other parcels that benefit from those specific improvements.

The method of apportionment established for this District and described herein, reflects the proportional special benefit each property receives from the improvements and services based on the actual or proposed land use of that parcel as compared to other properties within the District based on similarities and differences in parcel land use.

5.3.1 EQUIVALENT BENEFIT UNITS:

To assess benefits equitably it is necessary to relate each property's proportional special benefits to the special benefits of the other properties within the District. The method of apportionment established for most districts formed under the 1982 Act utilizes a weighted method of apportionment known as an Equivalent Benefit Unit (EBU) methodology that uses the single-family home site as the basic unit of assessment. A single-family home site equals one Equivalent Benefit Unit (EBU) and the other land uses are converted to a weighted EBU based on an assessment formula that equates the property's specific development status, type of development (land use), and size of the property, as compared to a single-family home site.

Although the Equivalent Benefit Unit method of apportioning special benefit is most commonly used and



applied to districts that have a wide range of land use classifications (residential and non-residential use), this District is comprised of only residential properties and the following apportionment analysis of special benefit addresses only residential land uses. Not all land use types described in the following are necessarily applicable to the development of properties within this District, but are presented for comparison purposes to support the proportional special benefit applied to those land use types within the District.

5.3.2 EBU APPLICATION BY LAND USE:

- (1) **Single-family Residential** — This land use is defined as a fully subdivided residential home site with or without a structure. This land use is assessed 1.0 EBU per lot or parcel. This is the base value that the other properties are compared and weighted against (i.e. Equivalent Benefit Unit “EBU”).
- (2) **Multi-family Residential** — This land use is defined as a fully subdivided residential parcel that has more than one residential unit developed on the property. (This land use typically includes apartments, duplexes, triplex etc., but does not generally include condominiums, town-homes or mobile-home parks). Based on average population densities and size of the structure as compared to a typical single-family residential unit, multi-family residential parcels shall be proportionately assessed for the parcel’s total number of residential units utilizing a sliding benefit scale. Although multi-family properties typically receive similar benefits to that of a single-family residential, it would not be reasonable to conclude that on a per unit basis, the benefits are equal. Studies have consistently shown that the average multi-family unit impacts infrastructure approximately 75% as much as a single-family residence (Sample Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition). These various studies indicate that most public improvements and infrastructure are utilized and impacted at reduced levels by multi-family residential units and a similar reduction in proportional benefit is appropriate. Furthermore, it is also reasonable to conclude that as the density (number of units) increases; the proportional benefit per unit tends to decline because the unit size and people per unit usually decreases. Based on these considerations and the improvements provided by this District, an appropriate allocation of special benefit for multi-family residential properties as compared to a single-family residential property is best represented by the following special benefit assignment: 0.75 EBU per unit for the first 50 units; 0.50 EBU per unit for units 51 through 100; and 0.25 EBU per unit for the remaining units.
- (3) **Condominium/Town-home Units** — Condominiums and town-homes tend to share attributes of both single-family residential and multi-family residential properties and for this reason are identified as a separate land use classification. Like most single-family residential properties, these properties are not usually considered rental property and generally, the County assigns each unit a separate APN or assessment number. However, condominiums and town-homes often have similarities to multi-family residential properties in that they are generally zoned medium to high density and in some cases may involve multiple units on a single APN. In consideration of these factors, it has been determined that an appropriate allocation of special benefit for condominiums, town-homes, and similar residential properties is best represented by an assignment of 0.75 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to an APN. (There is no adjustment for parcels with more than five units).



(4) Planned-Residential Development — This land use is defined as any property for which a tentative or final tract map has been filed and approved (a specific number of residential lots and units has been identified) and the property is expected to be subdivided within the fiscal year or is part of the overall improvement and development plan for the District. This land use classification often times involves more than a single parcel (e.g. the approved tract map encompasses more than a single APN). Each parcel that is part of the approved tract map shall be assessed proportionately for the proposed or estimated residential type and units to be developed on that parcel as part of the approved tract map. Accordingly, each parcel is assigned an appropriate number of benefit units that reflects the development of that property at build-out. (The EBU assigned to each parcel shall represent the combination of single-family, condominium, multi-family units to be developed).

(5) Vacant Residential — This land use is defined as property currently zoned for residential development, but a tentative or final tract map for the property has not yet been approved. Based upon the opinions of professional appraisers who appraise market property values for real estate in California, the land value portion of a property typically ranges from 20 to 30 percent of the total value of a developed residential property (the average is about 25 percent). Although the assessed value of an individual property is not a direct reflection of the property's special benefit, this general correlation between land value and structure value does provide a reasonable basis for apportioning special benefit for vacant residential properties. Utilizing this twenty-five percent (25%) apportionment and the number of single-family residential units typically developed per acre of land (an average of 4 residential units per acre) an Equivalent Benefit Unit of 1.0 EBU per acre (4 units per acre x 25%) is derived and presents an appropriate apportionment of special benefit for vacant residential properties. Recognizing that the full and timely utilization of vacant property is reduced as the size of the property increases, it has been determined that the maximum EBU assigned to a vacant residential parcel shall not exceed 25.0 EBU (parcels in excess of 25 acres are assigned 25.0 EBU). Parcels less than one acre, shall be assigned a minimum of 1.0 EBU (similar to a vacant lot within a residential tract).

(6) Exempt Parcels — This land use identifies properties that are not assessed and are assigned 0.0 EBU. This land use classification may include but is not limited to:

- Lots or parcels identified as public streets and other roadways (typically not assigned an APN by the County);
- Dedicated public easements including open space areas, utility rights-of-way, greenbelts, parkways, parks, or other publicly owned properties that are part of the District improvements or may provide other benefits to private properties within the District.;
- Private properties that cannot be developed independently from an adjacent property, such as common areas, sliver parcels, or bifurcated lots or properties with very restrictive development use.

These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment, but shall be reviewed annually by the assessment engineer to confirm the parcels current development status. Government owned properties or public properties are not necessarily exempt properties and shall be subject to special benefit assessment unless it qualifies for an exempt status.



(7) Special Cases — In many districts where multiple land use classifications are involved, there are usually one or more properties for which the standard land use classifications do not accurately identify the special benefits received from the improvements. For example, a parcel may be identified as a Vacant Residential property, however only a small percentage of the parcel’s total acreage can actually be developed. In this case, an appropriate calculation would be based on the net acreage that can be utilized rather than the gross acreage of the parcel.

The following table provides a summary of land use classifications and the Equivalent Benefit Unit calculations previously outlined.

Property Type	Equivalent Benefit Units	Multiplier
Single-family Residential	1.00	Per Unit/Lot/Parcel
Multi-family Residential	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Condominium/Townhome Units	0.75	Per Unit
Planned Residential Development	1.00	Per Planned SF Residential Lot
	0.75	Per Planned Condominium
	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Vacant Residential Land	1.00	Per Acre
Exempt Parcels	0.00	Per Parcel

The following formula is used to calculate each parcel’s EBU (proportional benefit).

$$\text{Parcel Type EBU} \times \text{Acres or Units} = \text{Parcel EBU}$$

The total number of Equivalent Benefit Units (EBU’s) is the sum of the individual EBU’s applied to parcels that receive special benefit from the improvements. An assessment amount per EBU (Assessment Rate) for the improvements is established by taking the total cost of the improvements and dividing that amount by the total number of EBU’s of the parcels benefiting from the improvements. This Rate is then applied back to each parcel’s individual EBU to determine the parcel’s proportionate benefit and assessment obligation for the improvements.

$$\text{Total Balance to Levy} / \text{Total EBU} = \text{Levy per EBU}$$

$$\text{Levy per EBU} \times \text{Parcel EBU} = \text{Parcel Levy Amount}$$

5.4 Assessment Range Formula

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218 (California Constitution Articles XIIC and XIID), legislative changes in the Brown Act defined a "new or increased assessment" to exclude certain conditions. These conditions included "any assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed." This definition and conditions were later confirmed through Senate Bill 919 (Proposition 218 implementing legislation).



The purpose of establishing an Assessment Range Formula is to provide for reasonable increases and inflationary adjustment to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District formation, the notice and assessment ballots presented to the property owners for approval included a maximum assessment amount for Fiscal Year 2005/2006 (initial maximum assessment), identification of the corresponding maximum assessment rate and a summary of the Assessment Range Formula described herein.

The Assessment Range Formula for this District shall be applied to the future assessments and is generally defined:

- If the proposed annual assessment (levy per EBU) for the upcoming fiscal year is less than or equal to the adjusted Maximum Assessment Rate, then the proposed annual assessment is not considered an increased assessment.
- The Maximum Assessment Rate is equal to the (Initial) Maximum Assessment Rate established for Fiscal Year 2005/2006 adjusted annually by the greater of, three percent (3%) or the annual percentage change in the Consumer Price Index (CPI) of “All Urban Consumers” for the San Francisco-Oakland-San Jose Area from February to February. The Maximum Assessment rate was increased by 3.000% for Fiscal Year 2024/25.

Beginning with Fiscal Year 2006/2007 and each fiscal year thereafter, the Maximum Assessment Rate has been recalculated and a new Maximum Assessment Rate established for the fiscal year utilizing the Assessment Range Formula described above. The Maximum Assessment Rate is calculated independent of the District’s annual budget and proposed assessment. The annual percentage change in CPI is based on available data provided by the U.S. Department of Labor; Bureau of Labor Statistics at the time the annual Report is prepared. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the City Council for determining fluctuations in the cost of living. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the change the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

Any proposed annual assessment (rate per EBU) less than or equal to the calculated (adjusted) Maximum Assessment Rate is not considered an increased assessment, even if the proposed assessment is significantly greater than the assessment applied in the prior fiscal year. Likewise, modifications to the method of apportionment that increase the proportional special benefit assigned to a particular land use classification would be considered an increased assessment. Conversely, reductions in the proportional special benefit assigned to a land use classification is permitted. Changes in land use or size of an individual property resulting in an assessment increase, are not considered an increased assessment.

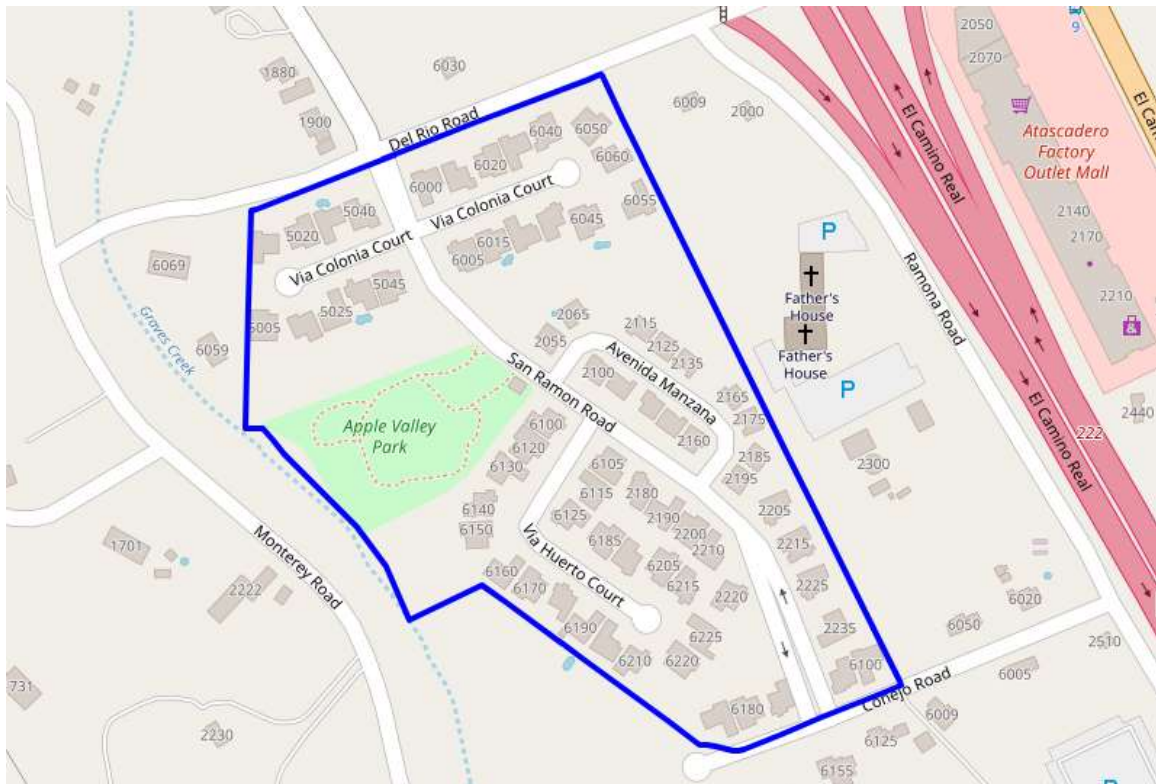
To impose a new or increased assessment other than the annual inflationary adjustment provided by the preceding Assessment Range Formula, the City must comply with the provisions of the California Constitution Article XIII Section 4c, that requires a public hearing and certain protest procedures including mailed notice of the public hearing and property owner protest balloting. Property owners through the balloting process must approve a proposed new or increased assessment before such an assessment may be imposed.



6. ASSESSMENT DIAGRAM

The parcels within the Street and Storm Drain Maintenance District No. 01 (Apple Valley) consist of the lots, parcels, and subdivisions of land located in the residential development known as Apple Valley, Tract 2495. The District covers approximately twenty-eight acres (27.71 acres) in the northern portion of the City of Atascadero.

The following map is based on the District Diagram, the San Luis Obispo County Assessor's Maps and the San Luis Obispo County Assessor's information and identifies the parcels of land within the proposed District, as the same existed at the time the District was formed. The combination of the District Diagram on file with the City Clerk and the Assessment Roll contained in this Report constitute the District Assessment Diagram.



7. ASSESSMENT ROLL

Parcel identification for each lot or parcel within the District is based on the Assessment Diagram presented herein and is based on available parcel maps and property data from the San Luis Obispo County Assessor's Office at the time the Engineer's Report was prepared. A listing of the proposed lots and parcels to be assessed within this District along with the assessment amounts is provided herein.

Non-assessable lots or parcels may include but are not limited to public streets and other roadways (typically not assigned an APN by the County); dedicated public easements, open space areas, rights-of-way, common areas; landlocked parcels, small parcels vacated by the County, bifurcated lots, and any other property that cannot be developed or has little or no value. These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment.

If any parcel submitted for collection is identified by the County Auditor/Controller to be an invalid parcel number for the fiscal year, a corrected parcel number and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel or parcels shall be based on the method of apportionment and assessment rate described in this Report as approved by the City Council. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the assessment amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment amount.

City of Atascadero
Street & Storm Drain Maintenance No. 1
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-192-001	6000 VIA COLONIA CT	SFR	1.0	\$926.70	\$550.00
049-192-002	6010 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-003	6020 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-004	6030 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-005	6040 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-006	6050 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-007	6060 VIA COLONIA RD	SFR	1.0	926.70	550.00
049-192-008	6055 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-009	6045 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-010	6035 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-011	6025 VIA COLONIA RD	SFR	1.0	926.70	550.00
049-192-012	6015 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-013	6005 VIA COLONIA RD	SFR	1.0	926.70	550.00
049-192-014	5045 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-015	5035 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-016	5025 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-017	5015 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-018	5005 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-019	5010 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-020	5020 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-021	5030 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-192-022	5040 VIA COLONIA CT	SFR	1.0	926.70	550.00
049-193-001	6100 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-002	6120 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-003	6130 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-004	6140 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-005	6150 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-006	6160 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-007	6170 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-008	6180 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-010	6200 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-011	6210 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-012	6220 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-013	6225 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-014	6215 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-015	6205 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-016	6195 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-017	6185 VIA HUERTO RD	SFR	1.0	926.70	550.00
049-193-018	6125 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-019	6115 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-020	6105 VIA HUERTO CT	SFR	1.0	926.70	550.00
049-193-021	2180 SAN RAMON RD	SFR	1.0	926.70	550.00

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 1
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-193-022	2190 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-023	2200 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-024	2210 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-025	2220 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-026	6190 CONEJO RD	SFR	1.0	926.70	550.00
049-193-027	6180 CONEJO RD	SFR	1.0	926.70	550.00
049-193-028	6160 CONEJO RD	SFR	1.0	926.70	550.00
049-193-029	6140 CONEJO RD	SFR	1.0	926.70	550.00
049-193-030	6100 CONEJO RD	SFR	1.0	926.70	550.00
049-193-031	2235 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-032	2225 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-033	2215 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-034	2205 SAN RAMON RD	SFR	1.0	926.70	550.00
049-193-035	2195 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-036	2185 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-037	2175 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-038	2165 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-039	2135 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-040	2125 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-041	2115 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-042	2065 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-043	2055 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-044	2100 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-045	2110 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-046	2140 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-047	2150 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-048	2160 AVENIDA MANZANA RD	SFR	1.0	926.70	550.00
049-193-051	6190 VIA HUERTO CT	SFR	1.0	926.70	550.00
70 Accounts			70.0	\$64,868.85	\$38,500.00

Slight variances may occur due to rounding

DRAFT RESOLUTION D

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, INITIATING PROCEEDINGS FOR ANNUAL LEVY OF ASSESSMENTS FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 01 (APPLE VALLEY) FOR FISCAL YEAR 2024/2025 PURSUANT TO THE PROVISIONS OF PART 2 OF DIVISION 15 OF THE CALIFORNIA STREETS AND HIGHWAYS CODE

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council has, by previous Resolutions, formed the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) (hereafter referred to as “District”) pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2 of Division 15 of the Streets and Highways Code of California, beginning with Section 22500* (hereafter referred to as the “Act”) that provides for levy and collection of assessments by the County of San Luis Obispo for the City of Atascadero to pay the maintenance and services of lighting facilities, landscaping, and appurtenant facilities and operations related thereto; and

WHEREAS, the District and the associated assessments are in compliance with the provisions of California Constitution Article XIID; and

WHEREAS, the City Council has retained NBS for the purpose of assisting with the Annual Levy of the District and to prepare and file a report with the City Clerk in accordance with the Act.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. Engineer’s Annual Levy Report: The City Council hereby orders NBS to prepare the Engineer’s Annual Levy Report concerning the levy of assessments for the District in accordance with *Chapter 3, Section 22622* of the Act.

SECTION 2. Proposed Improvements and Any Substantial Changes in Existing Improvements: The improvements within the District include the ongoing operation, administration, maintenance, servicing and incidental expenses related to the dedicated landscape areas, public street lighting and appurtenant facilities authorized pursuant to the Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District. The Engineer’s Annual Levy Report describes any new improvements or substantial changes in existing improvements.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION E

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, FOR PRELIMINARY APPROVAL OF THE ENGINEER'S ANNUAL LEVY REPORT FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 01 (APPLE VALLEY) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) does resolve as follows:

WHEREAS, the City Council has, by previous Resolutions, ordered the preparation of an Engineer's Annual Levy Report (hereafter referred to as the “Report”) for the district known and designated as the Atascadero Landscaping and Lighting Maintenance District No. 01 (Apple Valley) (hereafter referred to as the “District”) pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2 of Division of the Streets and Highways Code of California, beginning with Section 22500* (hereafter referred to as the “Act”); and

WHEREAS, the District and the associated assessments are in compliance with the provisions of California Constitution Article XIID; and

WHEREAS, the City Council has now been presented with the Report as required by *Chapter 1, Article 4, Section 22566* of said Act; and

WHEREAS, the City Council has carefully examined and reviewed the Report as presented and is preliminarily satisfied with the Report, each of the budget items and documents as set forth therein and is satisfied on a preliminary basis that the proposed assessments have been spread in accordance with the benefits received from the improvements, operation, maintenance, and services to be performed within each benefit zone as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The above recitals are true and correct.

SECTION 2. That the presented Report consists of the following:

- a. A Description of the Improvements
- b. The Annual Budget (Costs and Expenses of Services, Operation, and Maintenance)
- c. The Method of Apportionment that details the method of calculating each parcel's proportional special benefits and annual assessment.
- d. The District Roll containing the proposed assessment for each parcel within the District for Fiscal Year 2024/2025.

SECTION 3. The Report is hereby approved on a preliminary basis and ordered to be filed in the Office of the City Clerk as a permanent record and to remain open to public inspection.

SECTION 4. That the City Clerk shall certify to the passage and adoption of this Resolution, and the minutes of this meeting shall so reflect the presentation of the Report.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION F

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AND COLLECT ASSESSMENTS FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 01 (APPLE VALLEY) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) does resolve as follows:

WHEREAS, The City Council has by previous Resolution initiated proceedings for fiscal year 2024/2025 regarding the levy and collection of assessments for the Atascadero Landscaping and Lighting District No. 01 (Apple Valley) (hereafter referred to as the “District”). Pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with section 22500)* (hereafter referred to as the “Act”), assessments for the District shall be levied and collected by the County of San Luis Obispo for the City of Atascadero to pay the maintenance and services of the improvements and facilities related thereto; and

WHEREAS, the proposed District assessments for fiscal year 2024/2025 are less than or equal to the maximum assessments previously approved in accordance with the requirements of the California Constitution, Article XIID; and

WHEREAS, there has now been presented to this City Council an Engineer’s Annual Levy Report (hereafter referred to as the “Engineer’s Report”), and said Engineer’s Report has been filed with the City Clerk in accordance with the Act; and

WHEREAS, the City Council has examined and reviewed the Engineer’s Report as presented and is satisfied with the Report, each of the budget items and documents as set forth therein and is satisfied that the proposed assessments contained therein, have been spread in accordance with the benefits received from the improvements, operation, maintenance and services to be performed within the District, as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero, pursuant to Chapter 3, Section 22624 of the Act, as follows:

SECTION 1. The above recitals are true and correct.

SECTION 2. The City Council hereby declares its intention to seek the annual levy and collection of assessments within the District pursuant to the Act, over and including the lands, lots and parcels within the District boundary. The City Council further declares its intention to levy and collect assessments on such land to pay the annual costs and expenses of the improvements and services described in Section 4 of this Resolution, for fiscal year 2024/2025.

SECTION 3. The boundaries of the District are described in the Engineer’s Report and are consistent with the boundary established and described in the original formation documents, on file with the City Clerk, and incorporated herein by reference. The District is within the boundaries of the City of Atascadero, within the County of San Luis Obispo, State of California and includes the territory known as Apple Valley and referred to as the “Atascadero Landscaping and Lighting District No. 1”.

SECTION 4. The improvements within the District include the ongoing maintenance, operation and servicing of local landscaping and street lighting improvements established or installed in connection with development of properties within the District. These improvements generally include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District.

SECTION 5. The proposed assessments for fiscal year 2024/2025, as outlined in the Engineer’s Report, do not exceed the maximum assessment approved by the property owners through a property owner balloting proceeding conducted in 2005. As such, the proposed assessments do not constitute an increased assessment and do not require additional property owner approval in accordance with the requirements of the California Constitution, Article XIID.

SECTION 6. The City Council hereby declares its intention to conduct a Public Hearing concerning the District and the levy of assessments in accordance with *Chapter 3, Section 22626* of the Act.

SECTION 7. Notice is hereby given that a Public Hearing on these matters will be held by the City Council on Tuesday, June 25, 2024, at 6:00 p.m., at the City Council Chambers, 6500 Palma Avenue, Atascadero, California or as soon thereafter as feasible. At the Public Hearing, all interested persons shall be given an opportunity to hear and be heard on the proposed assessment to be levied for fiscal year 2024/2025 as contained in the Engineer’s Report on file in the City Clerk’s Office.

SECTION 8. The City Clerk shall give notice of the time and place of the Public Hearing to all property owners within the District pursuant to Sections 22626, 22552 and 22553 of the Act and 6061 of the Government Code by publishing this Resolution of Intention in a local newspaper one time at least 10 days prior to the Public Hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

CITY OF ATASCADERO

Fiscal Year 2024/25 Engineer's Report For:

Landscaping and Lighting District

District No. 01 (Apple Valley)

May 2024

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

CITY OF ATASCADERO
Landscaping & Lighting District No. 01
(Apple Valley)

6500 Palma Avenue
Atascadero, CA 93422
Phone – (805) 461-5000
Fax – (805) 461-7612

CITY COUNCIL

Heather Moreno, Mayor

Susan Funk, Mayor Pro Tem

Charles Bourbeau, Council Member

Mark Dariz, Council Member

Heather Newsom, Council Member

AGENCY STAFF

Jim Lewis, City Manager

Jeri Rangel, Administrative Services Director

Cindy Chavez, Deputy Director of Administrative Services

NBS

Tim Seufert, Client Services Director

Adina McCargo, Project Manager

Danielle Robison, Administrator

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1. ENGINEER’S LETTER

WHEREAS, on March 24, 2005 by Resolution No. 2005-045, the City Council of the City of Atascadero (the “City”), State of California, in accordance with and pursuant to the Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500 (the “1972 Act”) established the City of Atascadero Landscaping and Lighting District No. 01 (Apple Valley) (the “District”); and

WHEREAS, on May 28, 2024, the City Council, under the 1972 Act, adopted its Resolution Initiating Proceedings for the Annual Levy of Assessments and Ordering the Preparation of an Engineer’s Report for the District; and

WHEREAS, the Resolution Initiating Proceedings directed NBS to prepare and file a report describing the general nature, location, and extent of the improvements to be maintained; an estimate of the costs of the maintenance, operations, and servicing of the improvements for the District for the referenced fiscal year; a diagram for the District, showing the area and properties to be assessed; and an assessment of the estimated costs of the administration, maintenance, operations, and servicing the improvements, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

NOW THEREFORE, the assessments as detailed in this Engineer’s Report and as summarized in the table below are made to cover the portion of the estimated costs of maintenance, operation and servicing of the improvements to be paid by the assessable real property within the District in proportion to the special benefit received. The following table summarizes the proposed assessment for Fiscal Year 2024/25:

FY 2024/25 Budget Summary

Description	Total Costs	Costs Not Assessed	Proposed Assessment	Total Benefit Units	Maximum Rate	Proposed Rate Per BU
Annual Maintenance	\$80,720	(\$10,350)	\$70,370			
Special Annual Projects	3,060	0	3,060			
Administration	7,740	0	7,740			
Capital Reserve Collections/(Uses)	(2,009)	(650)	(2,659)			
Levy Adjustments	(26,511)	11,000	(15,511)			
Total	\$63,000	0	\$63,000	70	\$2,025.12	\$900.00

I, the undersigned, respectfully submit the enclosed Engineer’s Report and, to the best of my knowledge, information, and belief, the Engineer’s Report, Assessments, and the Assessment Diagram herein have been prepared, computed, and levied in accordance with the assessment methodology adopted, approved, and ordered by the City Council of the City of Atascadero and the 1972 Act.

City Engineer



2. EXECUTIVE SUMMARY

Pursuant to the provisions of the Landscaping and *Lighting Act of 1972*, being *Part 2 of Division 15* of the *California Streets and Highways Code*, commencing with *Section 22500* (hereafter referred to as the “1972 Act”), and in compliance with the substantive and procedural requirements of the California State Constitution Article XIID (hereafter referred to as “Article XIID”), the City Council of the City of Atascadero, County of San Luis Obispo, State of California (hereafter referred to as “City”), executed the proceedings required for the establishment of the special benefit assessment district designated as:

Landscaping and Lighting District No. 01 (Apple Valley)

(hereafter referred to as the “District”), which includes the lots and parcels of land within the residential subdivision known as Apple Valley, Tract 2495 within the City limits of the City. This Engineer’s Report (hereafter referred to as the “Report”) has been prepared in connection with the levy and collection of annual assessments related thereto for Fiscal Year 2024/25, as required pursuant to Chapter 1, Article 4 of the 1972 Act.

The City Council formed the District, and provided for the levy and collection of annual assessments on the County tax rolls to provide ongoing funding for the costs and expenses required to service and maintain the landscaping and lighting improvements associated with and resulting from the development of properties within the District. The improvements to be provided by the District and the assessments described herein are made pursuant to the 1972 Act and the substantive and procedural provisions of Article XIID.

This Report describes the District, the improvements, and the proposed assessments to be levied against properties in connection with the special benefits the properties will receive from the maintenance and servicing of the District improvements. The annual assessments will provide a funding source for the continued operation and maintenance of public landscaping and lighting improvements installed in connection with the development of properties within the District.

The improvements and assessments described in this Report are based on the planned development of properties within the District and represent an estimate of the direct expenditures, incidental expenses, and fund balances that will be necessary to maintain and service the improvements. The boundaries of the District, the proposed improvements, the method of apportionment, and assessments described herein are based on current development plans and specifications for Tract 2495; and by reference these plans and specifications are made part of this Report.

The word “parcel,” for the purposes of this Report, refers to an individual property assigned its own Assessor’s Parcel Number (APN) by the San Luis Obispo County Assessor’s Office. The San Luis Obispo County Auditor/Controller uses Assessor’s Parcel Numbers and specific Fund Numbers to identify properties to be assessed on the tax roll for the special benefit assessments.

As part of the District formation, the City of Atascadero conducted a Property Owner Protest Ballot proceeding for the proposed levy of a new assessment pursuant to the provisions of the California Constitution, Article XIID Section 4. In conjunction with this ballot proceeding, the City Council conducted a noticed public hearing on May 24, 2005 to consider public testimonies, comments and written protests regarding the formation of the District and levy of assessments. Upon conclusion of the public hearing,



property owner protest ballots received were opened and tabulated to determine whether majority protest existed (ballots were weighted based on assessment amounts), and by resolution the City Council confirmed the results of the ballot tabulation. Tabulation of the ballots indicated that majority protest did not exist for the proposed assessments and the assessment range formula presented and described herein, the City Council approved the Report (as submitted or amended), ordered the formation of the District, and approved the levy and collection of assessments. The assessments for Fiscal Year 2005/2006 were submitted to the San Luis Obispo County Auditor/Controller for inclusion on the property tax roll for each parcel.

Each subsequent fiscal year, an Engineer's Report shall be prepared and presented to the City Council describing the District any changes to the District or improvements and the proposed budget and assessments for that fiscal year and the City Council shall hold a noticed public hearing regarding these matters prior to approving and ordering the proposed levy of assessments. If the proposed assessments for the District exceed the maximum assessment described herein (as approved by the property owners), the new or increased assessment must be confirmed through another property owner protest ballot proceeding before such an assessment may be imposed. It should be noted that an increased assessment to an individual property resulting from changes in development or land use does not constitute an increased assessment.



3. PLANS AND SPECIFICATIONS

3.1 Description of the District

The territory within the District consists of the lots, parcels and subdivisions of land within the proposed residential subdivision known as the Apple Valley, Tract 2495, which encompasses an area of land totaling approximately twenty-eight acres (27.71 acres).

This residential subdivision includes seventy (70) single-family residential homes. The subdivision is situated in the northern portion of the City of Atascadero just southwest of Highway 101 and is generally located:

- South of Del Rio Road;
- North of Conejo Road;
- West of Ramona Road; and,
- East of Graves Creek

3.2 Improvements and Services Authorized by the 1972 Act

As generally defined by the 1972 Act and applicable to this District, the improvements and associated assessments may include one or more of the following:

- 1) The installation or planting of landscaping;
- 2) The installation or construction of statuary, fountains, and other ornamental structures and facilities;
- 3) The installation or construction of public lighting facilities including, but not limited to street lights and traffic signals;
- 4) The installation or construction of any facilities which are appurtenant to any of the foregoing or which are necessary or convenient for the maintenance or servicing thereof;
- 5) The installation of park or recreational improvements, including, but not limited to, all of the following:
 - a) Land preparation, such as grading, leveling, cutting and filling, sod, landscaping, irrigation systems, sidewalks, and drainage.
 - b) Lights, playground equipment, play courts, and public restrooms.
- 6) The acquisition of land for park, recreational, or open-space purposes or any existing improvement otherwise authorized pursuant to this section.
- 7) The maintenance or servicing, of any of the foregoing including the furnishing of services and materials for the ordinary and usual maintenance, operation, and servicing of any improvement including but not limited to:
 - a) Repair, removal, or replacement of all or any part of any improvements;
 - b) Grading, clearing, removal of debris, the installation or construction of curbs, gutters, walls, sidewalks, or paving, or water, irrigation, drainage, or electrical facilities;
 - c) Providing for the life, growth, health, and beauty of landscaping, including cultivation, irrigation, trimming, spraying, fertilizing, or treating for disease or injury;



- d) The removal of trimmings, rubbish, debris, and other solid waste;
 - e) The cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti;
 - f) Electric current or energy, gas, or other illuminating agent for any public lighting facilities or for the lighting or operation of any other improvements;
 - g) Water for the irrigation of any landscaping, the operation of any fountains, or the maintenance of any other improvements.
- 8) Incidental expenses associated with the improvements including, but not limited to:
- a) The cost of preparation of the report, including plans, specifications, estimates, diagram, and assessment;
 - b) The costs of printing, advertising, and the publishing, posting and mailing of notices;
 - c) Compensation payable to the County for collection of assessments;
 - d) Compensation of any engineer or attorney employed to render services;
 - e) Any other expenses incidental to the construction, installation, or maintenance and servicing of the improvements;
 - f) Costs associated with any elections held for the approval of a new or increased assessment.

3.3 Description of Improvements and Services

The purpose of this District is to ensure the ongoing maintenance, operation and servicing of local landscaping and street lighting improvements established or installed in connection with development of properties within the District. The improvements may consist of all or a portion of the public landscaped areas, street lighting and appurtenant facilities within and adjacent to the District (Tract 2495). These improvements generally include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District. The improvements to be maintained and funded entirely or partially through the District assessments are generally described as:

- Streetscape landscaping including street trees located on the perimeter of the development and interior streets of Tract 2495 that are within the public rights-of-way or easements and dedicated to the City for maintenance;
- Open space areas and fuel modification areas within or adjacent to the District boundaries;
- Park areas, recreational equipment, trails and landscaped drainage facilities developed and constructed as part of developing properties within Tract 2495;
- Public lighting facilities including street lighting, safety lighting and ornamental lighting installed as part of the residential development or landscaped improvement areas;
- Appurtenant facilities, equipment, materials and utilities related to the aforementioned improvements;
- Specifically not included as District improvements are those improvements located on private property, improvements and facilities that may be provided or maintained by an agency other than the City; improvements and facilities that may be provide by another assessment or tax



levied by the City or any improvement provided and maintained by a Homeowner's Association or similar entity.

Detailed maps and descriptions of the location and extent of the specific improvements to be maintained by the District are on file in the Office of Public Works and by reference are made part of this Report. Those portions of the District improvements that may be identified as general benefit or will be funded in whole or in part by other revenue sources as part of the approved development agreements, will not be included as part of the District assessments. The net annual cost to provide and maintain the improvements determined to be of special benefit shall be allocated to each property in proportion to the special benefits received.

3.3.1 LANDSCAPE IMPROVEMENTS

The landscape improvements for the District may include, but are not limited to turf, ground cover, shrubs and plants, trees, irrigation and drainage systems, ornamental lighting, masonry walls or other fencing, hardscape improvements, monuments, and associated appurtenant facilities located within the landscape easements or public rights-of-way. Specifically the landscape improvement areas for this District are identified as:

- Approximately 30,580 square feet of streetscape (parkway) landscaping within the public rights-of-way located on the perimeter of the development (south side of Del Rio Road); and along various locations of the interior streets including Via Colonia Court, San Ramon Road, Via Huerto Court, Avenida Manzana, and San Ramon Road.
- Approximately 108 street trees located along Del Rio Road, Via Colonia Court, San Ramon Road, Via Huerto Court, Avenida Manzana, San Ramon Road and Conejo Road;
- Approximately 12,541 square feet of landscaping and trees within the median islands on San Ramon Road located at the two entryways to the development (Del Rio Road and Conejo Road);
- Approximately 106,460 square feet of non-irrigated open space area within the District;
- Approximately 109,837 square feet of irrigated park and open space areas within the boundaries of the District including 56,647 square feet of turf; 40,335 square feet of irrigated open space; and 12,855 square feet of landscaped slopes within two drainage basins (6,690 and 6,165 square feet respectively); along with various trees and picnic areas;
- Approximately 10,320 square feet of paths and trails, 25,394 square feet sidewalks and 5,145 linear feet of fencing within and adjacent to the various landscape improvement areas.

3.3.2 PUBLIC LIGHTING IMPROVEMENTS

The lighting improvements may include but are not limited to the cost of providing electrical energy and servicing of lighting fixtures, poles, meters, conduits, electrical cable and associated appurtenant facilities associated with:

- Lighting facilities located within the landscaped areas including safety lights, security lights or ornamental lights installed as part of the District improvements.

4. ESTIMATE OF COSTS

BUDGET	Total Budget	Costs Not Assessed	2024/25 Assessment
DIRECT COSTS			
Annual Costs			
Landscape Services	\$48,450	(\$6,550)	\$41,900
Landscape Supplies	2,600	0	2,600
Landscape Utilities	14,770	(3,693)	11,077
City Landscape Services	7,400	0	7,400
Tree Trimming and Replacement/Infrastructure Improvements	7,500	(107)	7,393
Total Annual Direct Costs	80,720	(\$10,350)	\$70,370
CAPITAL EXPENDITURES			
Special Projects	\$3,060	\$0	\$3,060
Total Annual Special Projects	\$3,060	\$0	\$3,060
ADMINISTRATION EXPENSES			
Annual Administration Expenses			
City Annual Administration	\$2,190	\$0	\$2,190
Engineer's Report & Services	5,040	0	5,040
Public Noticing	510	0	510
Total Administration	\$7,740	\$0	\$7,740
TOTAL DIRECT & ADMINISTRATION COSTS	\$91,520	(\$10,350)	\$81,170
CAPITAL RESERVE COLLECTIONS/(USES)			
Landscape Rehabilitation/Replacement	\$1,300	(\$650)	\$650
Median Rehabilitation/Replacement	238	0	238
Open Space Rehabilitation/Replacement	1,120	0	1,120
Tree Rehabilitation/Replacement	(5,467)	0	(5,467)
Other Rehabilitation/Replacement	800	0	800
Total Annual Capital Reserve Collections/(Uses)	(2,009)	(\$650)	(2,659)
LEVY ADJUSTMENTS			
Interest Income - Improvement Fund	(\$2,116)	\$0	(\$2,116)
Interest Income - Operating Reserve Fund	(1,804)	0	(1,804)
Contributions from other Sources	(11,000)	(11,000)	0
Reserve Collection/(Use)	(11,591)	0	(\$11,591)
Total Levy Adjustments	(\$26,511)	(\$11,000)	(\$15,511)
BALANCE TO LEVY	\$63,000	\$0	\$63,000
DISTRICT STATISTICS			
Total Parcels			74
Parcels Levied			70
Total EBU ⁽¹⁾			70
Levy per EBU			\$900.00
Maximum Levy per EBU			\$2,025.12
FUND BALANCE INFORMATION			
Beginning Operating Reserve Balance			\$54,933
Operational Reserve Interest			1,804
Surplus Transfer from Improvement Fund			15,721
Operational Reserve Collection (Use)			(15,511)
Estimated Ending Operating Reserve Balance			\$56,947
Beginning Improvement Fund Balance			\$82,427
Improvement Fund Interest			2,116
Surplus Transfer to Operations Fund			(15,721)
Improvement Fund Collection/(Use)			(2,009)
Estimated Ending Improvement Fund Balance			\$66,813

⁽¹⁾ Levy per EBU rate does not include the County of San Luis Obispo fee of \$2.00 per parcel



5. METHOD OF ASSESSMENT

5.1 General

The 1972 Act permits the establishment of assessment districts by agencies for the purpose of providing certain public improvements, which include the construction, maintenance, and servicing of public lights, landscaping and appurtenant facilities. The 1972 Act further requires that the cost of these improvements be levied according to benefit rather than assessed value:

“The net amount to be assessed upon lands within an assessment district may be apportioned by any formula or method which fairly distributes the net amount among all assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements.”

The method of apportionment described in this Report for allocation of special benefit assessments utilizes commonly accepted engineering practices and have been established pursuant to the 1972 Act and the provisions of Article XIID. The formulas used for calculating assessments reflects the composition of parcels within the District and the improvements and services provided, to fairly apportion the costs based on the special benefits to each parcel.

5.2 Benefit Analysis

Each of the proposed improvements, the associated costs and assessments have been carefully reviewed, identified and allocated based on special benefit pursuant to the provisions of the 1972 Act and Article XIID. The improvements provided by this District and for which properties will be assessed have been identified as necessary, required and/or desired for the orderly development of the properties within the District to their full potential, consistent with the development plans and applicable portions of the City General Plan. As such, these improvements would be necessary and required of individual property owners for the development of such properties and the ongoing operation, servicing and maintenance of these improvements would be the financial obligation of those properties. Therefore, the improvements and the annual costs of ensuring the maintenance and operation of the improvements are a distinct and special benefit to the properties within the District. Any improvement or portion thereof that is considered to be of general benefit shall be funded by other revenue sources and not included as part of the special benefit assessments allocated to properties within the District.

5.2.1 SPECIAL BENEFIT

The method of apportionment (method of assessment) established herein is based on the premise that each assessed parcel within the District receives special benefits from the improvements and the desirability and security of those properties is enhanced by the presence of public lighting and well-maintained landscaping in close proximity to those properties

The special benefits associated with landscape improvements are specifically:

- Enhanced desirability of properties through association with the improvements.
- Improved aesthetic appeal of properties providing a positive representation of the area and properties.



- Enhanced adaptation of the urban environment within the natural environment from adequate green space and landscaping.
- Environmental enhancement through improved erosion resistance, dust and debris control, and fire prevention.
- Increased sense of pride in ownership of property within the District resulting from well-maintained improvements associated with the properties.
- Enhanced quality of life through well-maintained green space and landscaped areas.
- Reduced criminal activity and property-related crimes (especially vandalism) against properties in the District through well-maintained surroundings and amenities including abatement of graffiti.
- Enhanced environmental quality of the parcels by moderating temperatures, providing oxygenation and attenuating noise.

The special benefits of street lighting and other public lighting facilities are the convenience, safety, and security of property, improvements, and goods. Specifically:

- Enhanced deterrence of crime and the aid to police protection.
- Increased nighttime safety on roads, streets and public areas.
- Improved ability of pedestrians and motorists to see.
- Improved ingress and egress to property.
- Reduced vandalism and other criminal act and damage to improvements or property.
- Improved traffic circulation and reduced nighttime accidents and personal property loss.

The preceding special benefits contribute to the esthetic value and desirability of each of the assessed parcels within the District and thereby provide a special enhancement of the properties. Furthermore, it has been determined that the lack of funding to properly service and maintain the District improvements would have a negative impact on the properties within the District.

5.2.2 GENERAL BENEFIT

In reviewing each of the District improvements, the proximity of those improvements to both properties within the District and those outside the District as well as the reasons for installing and constructing such improvements, it is evident that the improvements are solely the result of developing properties within the District and the ongoing maintenance and operation of these improvements will directly affect the properties within the District. Although the improvements include public areas, easements, rights-of-way and other amenities available or visible to the public at large, the construction and installation of these improvements were only necessary for the development of properties within the District and were not required nor necessarily desired by any properties or developments outside the District boundary and any public access or use of the improvements by others is incidental. Therefore, it has been determined that the improvements and the ongoing maintenance, servicing and operation of those improvements provide no measurable general benefit to properties outside the District or to the public at large, but clearly provide distinct and special benefits to properties within the District.

5.3 Assessment Methodology

The method of apportionment for the District calculates the receipt of special benefit from the respective improvements based on the actual or proposed land use of the parcels within the District. The special

benefit received by each lot or parcel is equated to the overall land use of parcels within the District based on the parcel's actual land use or proposed development.

The costs associated with the improvements shall be fairly distributed among the parcels based upon the special benefit received by each parcel. Additionally, in compliance with the Article XIID Section 4, each parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred to that parcel. The benefit formula used to determine the assessment obligation is therefore based upon both the improvements that benefit the parcels within the District as well as the proposed land use of each property as compared to other parcels that benefit from those specific improvements.

To identify and determine the special benefit to be received by each parcel and their proportionate share of the improvement costs it is necessary to consider the entire scope of the planned improvements as well as individual property development within the District. Upon review of the proposed improvements it has been determined that each of the residential parcels within the District receives special benefits from the improvements to be funded by annual assessments and based on the planned property development a single zone of benefit is appropriate for the allocation of the assessments and proportional benefit.

5.3.1 EQUIVALENT BENEFIT UNITS:

To assess benefits equitably it is necessary to relate each property's proportional special benefits to the special benefits of the other properties within the District. The method of apportionment established for most districts formed under the 1972 Act utilizes a weighted method of apportionment known as an Equivalent Benefit Unit methodology that uses the single-family home site as the basic unit of assessment. A single-family home site equals one Equivalent Benefit Unit (EBU) and the other land uses are converted to a weighted EBU based on an assessment formula that equates the property's specific development status, type of development (land use), and size of the property, as compared to a single-family home site.

Although the Equivalent Benefit Unit method of apportioning special benefit is most commonly used and applied to districts that have a wide range of land use classifications (residential and non-residential use), this District is comprised of only residential properties and the following apportionment analysis of special benefit addresses only residential land uses. Not all land use types described in the following are necessarily applicable to the development of properties within this District, but are presented for comparison purposes to support the proportional special benefit applied to those land use types within the District.

5.3.2 EBU APPLICATION BY LAND USE:

- (1) **Single-family Residential** — This land use is defined as a fully subdivided residential home site with or without a structure. This land use is assessed 1.00 EBU per lot or parcel. This is the base value that the other properties are compared and weighted against regarding special benefit (i.e. Equivalent Benefit Unit "EBU").
- (2) **Multi-family Residential** — This land use is defined as a fully subdivided residential parcel that has more than one residential unit developed on the property. (This land use typically includes apartments, duplexes, triplex etc., but does not generally include condominiums, town-homes or mobile home parks). Based on average population densities and size of the structure as compared to a typical single-family residential unit, multi-family residential parcels shall be proportionately

assessed for the parcel's total number of residential units utilizing a sliding benefit scale. Although multi-family properties typically receive similar benefits to that of a single-family residential, it would not be reasonable to conclude that on a per unit basis, the benefits are equal. Studies have consistently shown that the average multi-family unit impacts infrastructure approximately 75% as much as a single-family residence (Sample Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition). These various studies indicate that most public improvements and infrastructure are utilized and impacted at reduced levels by multi-family residential units and a similar reduction in proportional benefit is appropriate. Furthermore, it is also reasonable to conclude that as the density (number of units) increases the proportional benefit per unit tends to decline because the unit size and people per unit usually decreases. Based on these considerations and the improvements provided by this District, an appropriate allocation of special benefit for multi-family residential properties as compared to a single-family residential is best represented by the following special benefit assignment: 0.75 EBU per unit for the first 50 units; 0.50 EBU per unit for units 51 through 100; and 0.25 EBU per unit for remaining units.

- (3) Condominium/Town-home Units** — Condominiums and town-homes tend to share attributes of both single-family residential and multi-family residential properties and for this reason are identified as a separate land use classification. Like most single-family residential properties, these properties are not usually considered rental property and generally, the County assigns each unit a separate APN or assessment number. However, condominiums and town-homes often have similarities to multi-family residential properties in that they are generally zoned medium to high density and in some cases may involve multiple units on a single APN. In consideration of these factors, it has been determined that an appropriate allocation of special benefit for condominiums, town-homes and similar residential properties is best represented by an assignment of 0.75 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to an APN. (There is no adjustment for parcels with more than five units).
- (4) Planned-Residential Development** — This land use is defined as any property for which a tentative or final tract map has been filed and approved (a specific number of residential lots and units has been identified) and the property is expected to be subdivided within the fiscal year or is part of the overall improvement and development plan for the District. This land use classification often times involves more than a single parcel (e.g. the approved tract map encompasses more than a single APN). Each parcel that is part of the approved tract map shall be assessed proportionately for the proposed or estimated residential type and units to be developed on that parcel as part of the approved tract map. Accordingly, each parcel is assigned an appropriate number of benefit units that reflects the development of that property at build-out. (The EBU assigned to each parcel shall represent the combination of single-family, condominium, multi-family units to be developed).
- (5) Vacant Residential** — This land use is defined as property currently zoned for residential development, but a tentative or final tract map for the property has not yet been approved. Based upon the opinions of professional appraisers who appraise market property values for real estate in California, the land value portion of a property typically ranges from 20 to 30 percent

of the total value of a developed residential property (the average is about 25 percent). Although the assessed value of an individual property is not a direct reflection of the property's special benefit, this general correlation between land value and structure value does provide a reasonable basis for apportioning special benefit for vacant residential properties. Utilizing this twenty-five percent (25%) apportionment and the number of single-family residential units typically developed per acre of land (an average of 4 residential units per acre) an Equivalent Benefit Unit of 1.00 EBU per acre (4 units per acre x 25%) is derived and presents an appropriate apportionment of special benefit for vacant residential properties. Recognizing that the full and timely utilization of vacant property is reduced as the size of the property increases, it has been determined that the maximum EBU assigned to a vacant residential parcel shall not exceed 25.00 EBU (parcels in excess of 25 acres are assigned 25.00 EBU). Parcels less than one acre, shall be assigned a minimum of 1.00 EBU (similar to a vacant lot within a residential tract).

(6) Exempt Parcels — This land use identifies properties that are not assessed and are assigned 0.00 EBU. This land use classification may include but is not limited to:

- Lots or parcels identified as public streets and other roadways (typically not assigned an APN by the County);
- Dedicated public easements including open space areas, utility rights-of-way, greenbelts, parkways, parks or other publicly owned properties that are part of the District improvements or may provide other benefits to private properties within the District;
- Private properties that cannot be developed independently from an adjacent property, such as common areas, sliver parcels or bifurcated lots or properties with very restrictive development use;

These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment but shall be reviewed annually by the assessment engineer to confirm the parcels' current development status. Government owned properties or public properties are not necessarily exempt properties and shall be subject to special benefit assessment unless it qualifies for an exempt status.

(7) Special Cases — In many districts where multiple land use classifications are involved, there are usually one or more properties for which the standard land use classifications do not accurately identify the special benefits received from the improvements. For example, a parcel may be identified as a Vacant Residential property, however only a small percentage of the parcel's total acreage can actually be developed. In this case, an appropriate calculation would be based on the net acreage that can be utilized rather than the gross acreage of the parcel.

The following table provides a summary of land use classifications and the Equivalent Benefit Unit calculations previously outlined.

Property Type	Equivalent Benefit Units	Multiplier
Single-family Residential	1.00	Per Unit/Lot/Parcel
Multi-family Residential	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Condominium/Townhome Units	0.75	Per Unit
Planned Residential Development	1.00	Per Planned SF Residential Lot
	0.75	Per Planned Condominium
	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
Vacant Residential Land	1.00	Per Acre
Exempt Parcels	0.00	Per Parcel

The following formula is used to calculate each parcel’s EBU (proportional benefit).

$$\text{Parcel Type EBU} \times \text{Acres or Units} = \text{Parcel EBU}$$

The total number of Equivalent Benefit Units (EBU’s) is the sum of the individual EBU's applied to parcels that receive special benefit from the improvements. An assessment amount per EBU (Assessment Rate) for the improvements is established by taking the total cost of the improvements and dividing that amount by the total number of EBU’s of the parcels benefiting from the improvements. This Rate is then applied back to each parcel’s individual EBU to determine the parcel’s proportionate benefit and assessment obligation for the improvements.

$$\text{Total Balance to Levy} / \text{Total EBU} = \text{Levy per EBU}$$

$$\text{Levy per EBU} \times \text{Parcel EBU} = \text{Parcel Levy Amount}$$

5.4 Assessment Range Formula

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218 (California Constitution Articles XIII C and XIII D), legislative changes in the Brown Act defined a "new or increased assessment" to exclude certain conditions. These conditions included "any assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed." This definition and conditions were later confirmed through Senate Bill 919 (Proposition 218 implementing legislation).

The purpose of establishing an Assessment Range Formula is to provide for reasonable increases and inflationary adjustment to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District formation, the notice and assessment ballots presented to the property owners for approval included a maximum assessment



amount for Fiscal Year 2005/2006 (initial maximum assessment), identification of the corresponding maximum assessment rate and a summary of the Assessment Range Formula described herein.

The Assessment Range Formula for this District shall be applied to future assessments and is generally defined:

- If the proposed annual assessment (levy per EBU) for the upcoming fiscal year is less than or equal to the adjusted Maximum Assessment Rate, then the proposed annual assessment is not considered an increased assessment.
- The Maximum Assessment Rate is equal to the (Initial) Maximum Assessment Rate established for Fiscal Year 2005/2006 adjusted annually by the greater of, three percent (3%) or the annual percentage change in the Consumer Price Index (CPI) of “All Urban Consumers” for the San Francisco-Oakland-Hayward Area from February to February. The Maximum Assessment rate was increased by 3.000% for Fiscal Year 2024/25.

Beginning with Fiscal Year 2006/2007 and each fiscal year thereafter, the Maximum Assessment Rate has been recalculated and a new Maximum Assessment Rate is established for the fiscal year utilizing the Assessment Range Formula described above. The Maximum Assessment Rate is calculated independent of the District’s annual budget and proposed assessment. The annual percentage change in CPI is based on available data provided by the U.S. Department of Labor; Bureau of Labor Statistics at the time the annual Report is prepared. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the City Council for determining fluctuations in the cost of living. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the change the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

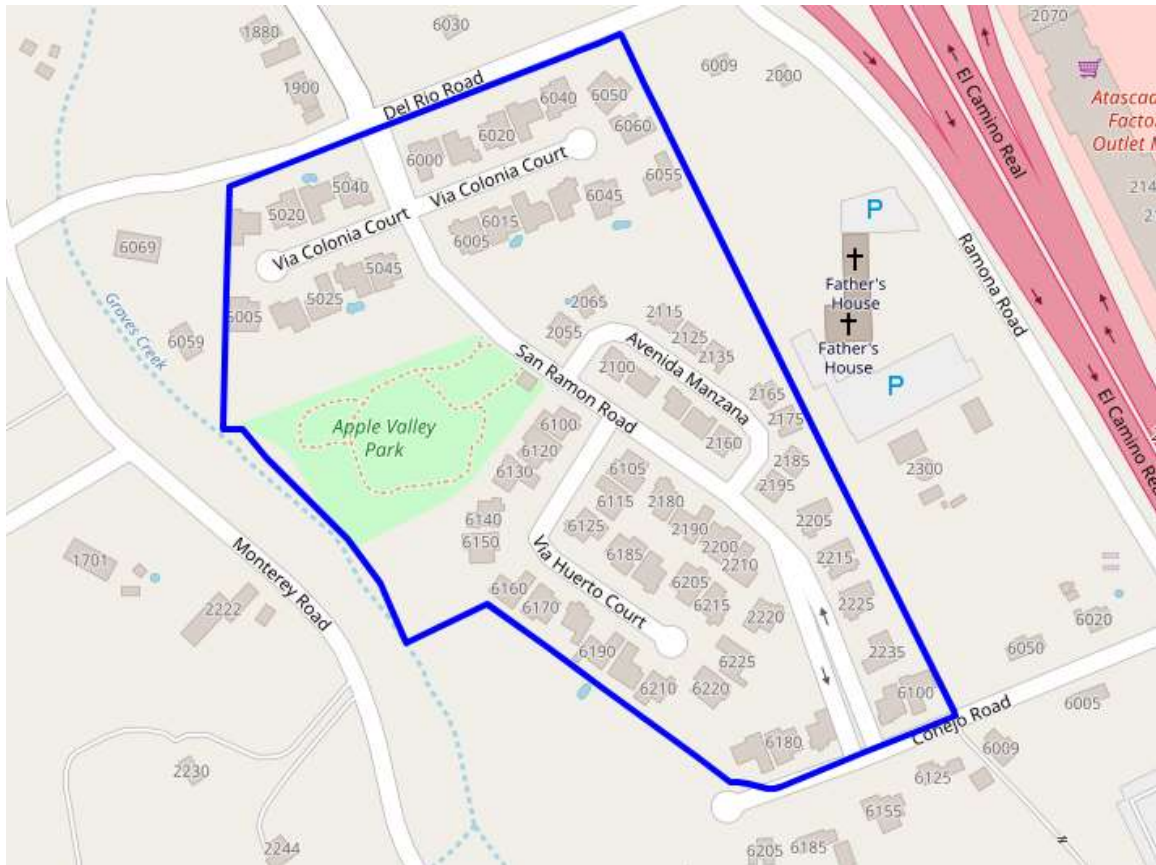
Any proposed annual assessment (rate per EBU) less than or equal to the calculated (adjusted) Maximum Assessment Rate is not considered an increased assessment, even if the proposed assessment is significantly greater than the assessment applied in the prior fiscal year. Likewise, modifications to the method of apportionment that increase the proportional special benefit assigned to a particular land use classification would be considered an increased assessment. Conversely, reductions in the proportional special benefit assigned to a land use classifications are permitted. Changes in land use or size of an individual property resulting in an assessment increase, is not considered an increased assessment.

To impose a new or increased assessment other than the annual inflationary adjustment provided by the preceding Assessment Range Formula, the City must comply with the provisions of Article XIID Section 4c, that requires a public hearing and certain protest procedures including mailed notice of the public hearing and property owner protest balloting. Property owners through the balloting process must approve a proposed new or increased assessment before such an assessment may be imposed.

6. ASSESSMENT DIAGRAM

The parcels within the Landscaping and Lighting District No. 01 (Apple Valley) consist of the lots, parcels and subdivisions of land located in the planned residential development known as Apple Valley, Tract 2495. The District covers approximately twenty-eight acres (27.71 acres) in the northern portion of the City of Atascadero.

The following map is based on the District Diagram, the San Luis Obispo County Assessor's Maps and the San Luis Obispo County Assessor's information and identifies the parcels of land within the proposed District, as the same existed at the time the District was formed. The combination of the District Diagram on file with the City Clerk and the Assessment Roll contained in this Report constitute the District Assessment Diagram.



7. ASSESSMENT ROLL

Parcel identification for each lot or parcel within the District is based on the Assessment Diagram presented herein and is based on available parcel maps and property data from the San Luis Obispo County Assessor's Office at the time the Engineer's Report was prepared. A listing of the lots and parcels to be assessed within this District along with the assessment amounts is provided herein.

Non-assessable lots or parcels may include, but are not limited to public streets and other roadways (typically not assigned an APN by the County); dedicated public easements, open space areas, rights-of-way, common areas; landlocked parcels, small parcels vacated by the County, bifurcated lots, and any other property that cannot be developed or has little or no value. These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment.

If any parcel submitted for collection is identified by the County Auditor/Controller to be an invalid parcel number for the fiscal year, a corrected parcel number and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel or parcels shall be based on the method of apportionment and assessment rate described in this Report as approved by the City Council. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the assessment amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment amount.

City of Atascadero
Landscaping & Lighting Maint Dist No. 1
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Amount
049-192-001	6000 VIA COLONIA CT	SFR	1.0	\$2,025.12	\$900.00
049-192-002	6010 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-003	6020 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-004	6030 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-005	6040 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-006	6050 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-007	6060 VIA COLONIA RD	SFR	1.0	2,025.12	900.00
049-192-008	6055 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-009	6045 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-010	6035 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-011	6025 VIA COLONIA RD	SFR	1.0	2,025.12	900.00
049-192-012	6015 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-013	6005 VIA COLONIA RD	SFR	1.0	2,025.12	900.00
049-192-014	5045 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-015	5035 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-016	5025 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-017	5015 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-018	5005 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-019	5010 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-020	5020 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-021	5030 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-192-022	5040 VIA COLONIA CT	SFR	1.0	2,025.12	900.00
049-193-001	6100 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-002	6120 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-003	6130 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-004	6140 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-005	6150 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-006	6160 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-007	6170 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-008	6180 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-010	6200 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-011	6210 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-012	6220 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-013	6225 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-014	6215 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-015	6205 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-016	6195 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-017	6185 VIA HUERTO RD	SFR	1.0	2,025.12	900.00
049-193-018	6125 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-019	6115 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-020	6105 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
049-193-021	2180 SAN RAMON RD	SFR	1.0	2,025.12	900.00

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 1
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Amount
049-193-022	2190 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-023	2200 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-024	2210 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-025	2220 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-026	6190 CONEJO RD	SFR	1.0	2,025.12	900.00
049-193-027	6180 CONEJO RD	SFR	1.0	2,025.12	900.00
049-193-028	6160 CONEJO RD	SFR	1.0	2,025.12	900.00
049-193-029	6140 CONEJO RD	SFR	1.0	2,025.12	900.00
049-193-030	6100 CONEJO RD	SFR	1.0	2,025.12	900.00
049-193-031	2235 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-032	2225 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-033	2215 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-034	2205 SAN RAMON RD	SFR	1.0	2,025.12	900.00
049-193-035	2195 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-036	2185 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-037	2175 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-038	2165 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-039	2135 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-040	2125 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-041	2115 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-042	2065 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-043	2055 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-044	2100 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-045	2110 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-046	2140 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-047	2150 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-048	2160 AVENIDA MANZANA RD	SFR	1.0	2,025.12	900.00
049-193-051	6190 VIA HUERTO CT	SFR	1.0	2,025.12	900.00
70 Accounts			70.0	\$141,758.56	\$63,000.00

Slight variances may occur due to rounding



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A4

Department: Administrative Services
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER
FROM: JERI RANGEL, DIRECTOR OF ADMINISTRATIVE SERVICES
PREPARED BY: DAWN PATTERSON, ACCOUNTING SPECIALIST
SUBJECT: De Anza Estates Assessment Districts

RECOMMENDATION:

Council:

1. Adopt Draft Resolution A, initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025.
2. Adopt Draft Resolution B, accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates).
3. Adopt Draft Resolution C, declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters.
4. Adopt Draft Resolution D, initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code.
5. Adopt Draft Resolution E, for preliminary approval of the Annual Engineer's Levy Report for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025.
6. Adopt Draft Resolution F, declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025.

REPORT IN BRIEF:

Adoption of the annual Draft Resolutions A-F declaring the City's intention to levy and collect assessments for fiscal year 2024/2025 for the De Anza Estates Street and Storm Drain Maintenance and the Landscaping and Lighting Maintenance Districts.

DISCUSSION:

The City Council formed and began assessing Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) in 2005. This district was formed to provide funding for future routine maintenance of the streets, storm drains and sidewalks in the De Anza Estates subdivision.

The City Council also formed and began assessing Atascadero Landscape and Lighting Maintenance District No. 03 (De Anza Estates) in 2005. This district was formed to provide for funding and maintenance of street trees, open space, park area, medians, walkways, paths and other landscape and lighting improvements within the De Anza Estates subdivision.

NBS, an independent financial consultant, was hired to prepare the engineer’s report for the two districts. The engineer’s report and the levies must be approved by Council annually. This is done in a two-step process. Tonight, there are three resolutions for each district (a total of 6 resolutions in all) that must be passed in order to continue the assessments within the districts. The resolutions passed tonight will also establish the date and time for the public hearing. The public hearing is tentatively scheduled for June 25, 2024 at 6:00 p.m., at which time the final resolutions will be presented to the Council for consideration.

The proposed assessments for fiscal year 2024/2025 are less than the Maximum Assessment Rate. In accordance with the formula voters of the district adopted in 2005, the City may increase the Maximum Assessment Rate for inflation by the greater of the Consumer Price Index (CPI) or 3.0%. The Maximum Assessment Rate was increased by 3% (CPI) this year for both districts.

An Assessment Information Notice was mailed to all property owners on April 22, 2024. The notice provided the date of the upcoming June 25, 2024 Public Hearing, information on how to participate in the meeting, staff contact information, and the proposed and current levies for both districts.

Staff has reviewed the short and long-term costs to maintain the districts and recommends the total cost of both districts of \$1,274 remains flat when compared to the prior year. The Landscaping and Lighting District levy is about 15% of the allowable maximum annual assessment and the Street and Storm Drain District is about 60% of the allowable maximum annual assessment.

District	Amount Per EBU Assessment Fiscal Year 2023-24	Amount Per EBU Proposed Assessment Fiscal Year 2024-25
Atascadero Street and Storm Drain Maintenance District No. 03 De Anza Estates - Senior Housing	\$ 342.48	\$ 342.48
Atascadero Street and Storm Drain Maintenance District No. 03 De Anza Estates - Single Family Residential	\$ 681.50	\$ 681.50
Atascadero Landscaping and Lighting Maintenance District No. 03 De Anza Estates	\$ 250.00	\$ 250.00

The levies for fiscal year 2024/2025 are proposed with no increases and reserves are sufficient for now; however, staff predicts that the Landscape and Lighting District will likely see future increased costs due to the aging landscape, increases in utilities (water and electricity), and increases in labor costs for the landscape maintenance contractor. City staff works to maximize efficiencies and minimize levy increases, however, modest levy increases are expected in future years in order to continue providing the existing service levels.

FISCAL IMPACT:

Annual assessments for 2024/2025 will total \$30,562 for road/drainage system maintenance and \$15,875 for landscape and lighting maintenance. These amounts will be assessed to the owners of parcels in De Anza Estates. The City General Fund will contribute \$1,400 for the fiscal year 2024/2025 for half of the maintenance costs of the trails and open space.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. **Draft Resolution A** - initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025
2. **Draft Resolution B** - accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates)
3. **Draft Resolution C** - declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters
4. **Engineer's Annual Levy Report**- for the levy and collection of fiscal year 2024/2025 assessments for Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates)
5. **Draft Resolution D** - initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code
6. **Draft Resolution E** - preliminary approval of the Annual Engineer's Levy Report for Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025
7. **Draft Resolution F** - declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 03 (De Anza Estates) for fiscal year 2024/2025
8. **Engineer's Annual Levy Report**- for the levy and collection of fiscal year 2024/2025 assessments for Landscaping and Lighting District No. 03 (De Anza Estates)

DRAFT RESOLUTION A

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, INITIATING PROCEEDINGS FOR THE LEVY AND COLLECTION OF ANNUAL ASSESSMENTS FOR ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 03 (DE ANZA ESTATES) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”) formed an assessment district to be designated as Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) (hereafter referred to as the “District”), for the purpose of funding the ongoing operation, maintenance and servicing of public streets, sidewalks, storm drain and flood control facilities installed in conjunction with the development of properties known as De Anza Estates Tract 2498; and to levy and collect annual assessments related thereto. The 1982 Act provides for the formation of such an assessment district pursuant to *Article 3 Section 54710*, and provides for the levy and collection of assessments by the County on behalf of the City pursuant to *Article 4 Section 54718*; and

WHEREAS, the City Council has retained NBS as the Engineer of Work, for the purpose of assisting with the administration of the District, the establishment of annual assessments, and to prepare and file an Engineer’s Report with the City Clerk in accordance with the 1982 Act; and in accordance with the requirements of the *California Constitution, Articles XIIC and XIID*.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The City Council hereby orders the Engineer to prepare and file an Engineer’s Annual Levy Report concerning the levy of assessments for properties within the District as specified by *Article 4 Section 54716* of the 1982 Act.

SECTION 2. The District improvements include the ongoing operation, administration, maintenance and servicing of the public streets, drainage and flood control systems and appurtenant facilities authorized pursuant to the 1982 Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to pavement, curbs, sidewalks, hardscape, bridges, fencing, signage, drains, pipes, inlets, outlets, catch basins, drainage basins, manholes, and associated appurtenant facilities located within the public street right-of-ways and other public easements within the District, and dedicated to the City of Atascadero for such maintenance.

SECTION 3. The territory within Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) consists of lots, parcels and subdivisions of land located in the development known as De Anza Estates Tract 2498.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ____th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION B

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, ACCEPTING AND PRELIMINARILY APPROVING THE ENGINEER’S ANNUAL LEVY REPORT REGARDING THE ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 03 (DE ANZA ESTATES)

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council has, by previous Resolution, ordered the preparation of an Engineer’s Annual Levy Report (hereafter referred to as the “Report”) regarding the assessment district to be designated as the Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) (hereafter referred to as the “District”), and the levy and collection of assessments related thereto, pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”); and

WHEREAS, there has now been presented to this City Council the Report as specified by *Article 4 Section 54716* of said 1982 Act; and

WHEREAS, the City Council has carefully examined and reviewed the Report as presented and is preliminarily satisfied with the District and the budget items and documents as set forth therein and is satisfied that the proposed assessments have been spread in accordance with the special benefits received from the improvements, operation, administration, maintenance, and services to be performed within the District, as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The preceding recitals are true and correct.

SECTION 2. That the Report as presented, consists of the following:

- a. A Description of Improvements.
- b. A Boundary Diagram of the District.
- c. The Method of Apportionment that details the method of calculating each parcel’s proportional special benefits and annual assessment.
- d. The proposed Budget (Costs and Expenses) and the duration and collection of assessments.
- e. The District Roll containing the Levy for each Assessor Parcel Number within the District for fiscal year 2024/2025.

SECTION 3. The Report is hereby approved on a preliminary basis and ordered to be filed in the Office of the City Clerk as a permanent record and to remain open to public inspection.

SECTION 4. The Maximum Assessment described in the Report is hereby approved on a preliminary basis.

SECTION 5. The City Clerk shall certify to the passage and adoption of this Resolution, and the Minutes of this meeting shall so reflect the presentation of the Report.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION C

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AND COLLECT ANNUAL ASSESSMENTS WITHIN ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 03 (DE ANZA ESTATES) IN FISCAL YEAR 2024/2025, AND TO APPOINT A TIME AND PLACE FOR THE PUBLIC HEARING ON THESE MATTERS

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”) did by previous Resolution approve the levy and collection of annual assessments to pay for the operation, maintenance and servicing of public streets, drainage and flood control systems and appurtenant facilities related thereto for the assessment district designated as Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) (hereafter referred to as the “District”); and

WHEREAS, the Engineer selected by the City Council has prepared and filed with the City Clerk a Report in connection with the proposed District, and the levy of assessments for Fiscal Year 2024/2025 (July 1, 2024 and ending June 30, 2025) in accordance with *Chapter 1, Article 4* of the 1982 Act and in accordance with the requirements of the *California Constitution, Articles XIII C and XIII D*, and the City Council did by previous Resolution preliminarily approve such Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The City Council hereby declares its intention to seek the annual levy of the District pursuant to the 1982 Act, over and including the land within the District boundary, and to levy and collect special benefit assessments on parcels of land within the District to pay for the costs and expenses associated with the operation, maintenance, repair and servicing of public streets, drainage and flood control systems and appurtenant facilities related thereto.

SECTION 2. The District improvements include the ongoing operation, administration, maintenance and servicing of the public streets, drainage and flood control systems and appurtenant facilities authorized pursuant to the 1982 Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to pavement, curbs, sidewalks, hardscape, bridges, fencing, signage, drains, pipes, inlets, outlets, catch basins, drainage basins, manholes, and associated appurtenant facilities located within the public street rights-of-way and other public easements within the District, and dedicated to the City of Atascadero for such maintenance. The Engineer’s Report, as ordered by previous Resolution, provides a full and complete description of the improvements within the District.

SECTION 3. The proposed territory within Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) consists of lots, parcels and subdivisions of land located in the development known as De Anza Estates Tract 2498.

SECTION 4. The proposed assessments for the District are outlined in the Engineer’s Report. The Report details the proposed assessments necessary to provide for the annual operation, administration, services, and maintenance of the improvements described in Section 2 of this Resolution.

SECTION 5. Notice is hereby given that a Public Hearing on these matters will be held by the City Council on Tuesday, June 25, 2024, at 6:00 p.m. or as soon thereafter as feasible in the regular meeting chambers of the City Council located at 6500 Palma Avenue, Atascadero, California. At the Public Hearing, all interested persons shall be given an opportunity to hear and be heard on the proposed assessment to be levied for fiscal year 2024/2025 as contained in the Engineer’s Report on file in the City Clerk’s Office.

SECTION 6. The City Clerk shall give notice of the filing of the report and the time and place of the Public Hearing by publishing in a local newspaper one time at least 10 days prior to the Public Hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

CITY OF ATASCADERO

Fiscal Year 2024/25 Engineer's Report For:

Street and Storm Drain Maintenance District No. 03 (De Anza Estates)

May 2024

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

CITY OF ATASCADERO
Street and Storm Drain Maintenance District No. 03
(De Anza Estates)

6500 Palma Avenue
Atascadero, CA 93422
Phone – (805) 461-5000
Fax – (805) 461-7612

CITY COUNCIL

Heather Moreno, Mayor

Susan Funk, Mayor Pro Tem

Charles Bourbeau, Council Member

Mark Dariz, Council Member

Heather Newsom, Council Member

AGENCY STAFF

Jim Lewis, City Manager

Jeri Rangel, Administrative Services Director

Cindy Chavez, Deputy Director of Administrative Services

NBS

Tim Seufert, Client Services Director

Adina McCargo, Project Manager

Danielle Robison, Administrator

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1. ENGINEER’S LETTER

WHEREAS, on August 9, 2005 by Resolution No. 2005-071, the City Council of the City of Atascadero (the "City"), State of California, in accordance with and pursuant to the provisions of the Benefit Assessment Act of 1982, being Chapter 6.4 of the California Government Code, commencing with Section 54703 (hereafter referred to as the "1982 Act"), and in compliance with the substantive and procedural requirements of the California State Constitution Article XIID (hereafter referred to as the "California Constitution"), established the City of Atascadero Street and Storm Drain Maintenance District No. 03 (De Anza Estates) (the "District"); and

WHEREAS, on May 28, 2024, the City Council, adopted its Resolution Initiating Proceedings for the Annual Levy of Assessments and Ordering the Preparation of an Engineer’s Report for the District; and

WHEREAS, the Resolution Initiating Proceedings directed NBS to prepare and file a report describing the general nature, location, and extent of the improvements to be maintained; an estimate of the costs of the maintenance, operations, and servicing of the improvements for the District for the referenced fiscal year; a diagram for the District, showing the area and properties to be assessed; and an assessment of the estimated costs of the administration, maintenance, operations, and servicing the improvements, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

NOW THEREFORE, the assessments as detailed in this Engineer’s Report and as summarized in the table below are made to cover the portion of the estimated costs of maintenance, operation and servicing of the improvements to be paid by the assessable real property within the District in proportion to the special benefit received. The following table summarizes the proposed assessment for Fiscal Year 2024/25:

FY 2024/25 Summary of Assessment

Description	Zone A - Amount	Zone B - Amount	Total Amount
Estimated Annual Costs	\$8,121	\$14,389	\$22,510
Capital Reserve Collection/(Uses)	\$12,695	\$19,042	\$31,736
Levy Adjustments	(\$9,947)	(\$13,737)	(\$23,684)
Balance to Levy ⁽¹⁾	\$10,868	\$19,694	\$30,562
Fiscal Year 2024/25 Maximum Rate ⁽²⁾	\$920.14	\$1,137.59	
Fiscal Year 2024/25 Proposed Applied Rate ⁽²⁾	\$342.48	\$681.50	

(1) Total Levy Amount is rounded up to the nearest dollar.

(2) Rates above are per Equivalent Benefit Unit.

I, the undersigned, respectfully submit the enclosed Engineer’s Report and, to the best of my knowledge, information, and belief, the Engineer’s Report, Assessments, and the Assessment Diagram herein have been prepared, computed, and levied in accordance with the assessment methodology adopted, approved, and ordered by the City Council of the City of Atascadero and the 1982 Act.

City Engineer



2. EXECUTIVE SUMMARY

Pursuant to the provisions of the *Benefit Assessment Act of 1982, being Chapter 6.4 of the California Government Code, commencing with Section 54703* (hereafter referred to as the “1982 Act”), and in compliance with the substantive and procedural requirements of the *California State Constitution Article XIID* (hereafter referred to as the “California Constitution”), the City Council of the City of Atascadero, County of San Luis Obispo, State of California (hereafter referred to as “City”), proposed to form and levy special benefit assessments for the district designated as:

Street and Storm Drain Maintenance District No. 03 (De Anza Estates)

(hereafter referred to as the “District”), which includes the lots and parcels of land within the residential subdivision known as De Anza Estates, Tract 2498 within the City limits of the City. This Engineer’s Report (hereafter referred to as the “Report”) has been prepared in connection with the levy and collection of annual assessments related thereto for Fiscal Year 2024/25.

The City Council formed the District and provided for the levy and collection of annual assessments on the County tax rolls to provide ongoing funding for the costs and expenses required to service and maintain the street and storm drain improvements and facilities associated with and resulting from the development of properties within the District. The improvements to be provided by the District and the assessments described herein are made pursuant to the 1982 Act and the substantive and procedural provisions of the California Constitution.

This Report describes the District, the improvements, and the proposed assessments to be levied against properties in connection with the special benefits the properties will receive from the maintenance and servicing of the District improvements and facilities. The annual assessments described herein will provide a funding source for the continued operation and maintenance of streets, storm drain system and appurtenant facilities installed in connection with the development of properties within the District.

The improvements and assessments described in this Report are based on the development of properties within the District and represent an estimate of the direct expenditures, incidental expenses, and fund balances that will be necessary to maintain and service the streets and storm drain system that provides special benefits to properties within the District. The structure of the District (organization), the improvements, the method of apportionment, and assessments described herein are based on current development plans and specifications for Tract 2498; and by reference these plans and specifications are made part of this Report.

The word “parcel,” for the purposes of this Report, refers to an individual property assigned its own Assessor’s Parcel Number (APN) by the San Luis Obispo County Assessor’s Office. The San Luis Obispo County Auditor/Controller uses Assessor’s Parcel Numbers and specific Fund Numbers to identify properties to be assessed on the tax roll for the special benefit assessments.

As part of this District’s formation, the City conducted a Property Owner Protest Ballot proceeding for the proposed levy of a new assessment pursuant to the provisions of the *California Constitution, Article XIID Section 4*. In conjunction with this ballot proceeding, the City Council conducted a noticed public hearing to consider public testimonies, comments and written protests regarding the formation of the District and



levy of assessments. Upon conclusion of the public hearing, property owner protest ballots received were opened and tabulated to determine whether majority protest existed (ballots were weighted based on assessment amounts), and by resolution the City Council confirmed the results of the ballot tabulation. The tabulation of the ballots indicated that majority protest did not exist for the proposed assessments and the assessment range formula presented and described herein; therefore, the City Council approved the Report (as submitted or amended), ordered the formation of the District, and approved the levy and collection of assessments. The assessments for Fiscal Year 2005/2006 were submitted to the San Luis Obispo County Auditor/Controller for inclusion on the property tax roll for each parcel.

Each subsequent fiscal year, a Report shall be prepared and presented to the City Council describing any changes to the improvements, proposed services, the annual budget or assessments for that fiscal year and the City Council may hold a noticed public hearing regarding these matters prior to approving and ordering the proposed levy of assessments. If the proposed assessments for the District exceed the maximum assessment described herein (as approved by the property owners), the new or increased assessment must be confirmed through another property owner protest ballot proceeding before such an assessment may be imposed. It should be noted that an increased assessment to an individual property resulting from changes in development or land use does not constitute an increased assessment.

3. PLANS AND SPECIFICATIONS

3.1 Benefiting Properties within the District

The territory within the District consists of the lots, parcels and subdivisions of land within the proposed residential subdivision known as the De Anza Estates, Tract 2498, which encompasses an area of land totaling approximately seventy-six acres (75.84 acres).

This subdivision includes twenty-six (26) Single-Family Residential Units and sixty (60) Modified Housing/Senior Housing Units. The subdivision is situated in the northern portion of the City of Atascadero northeast of Highway 101 and is generally located:

- At the North end of El Camino Real;
- North and East of U.S. HWY 101; and,
- South and West of the Salinas River.

3.2 Funding Authorized by the 1982 Act

As generally defined by the Benefit Assessment Act of 1982 and applicable to this District, the City may impose a benefit assessment to finance the maintenance and operation costs of the following services:

- Drainage and Flood Control;
- Streets and Roads.

In addition to imposing a benefit assessment for the annual maintenance and operation of the District improvements, the City may also authorize an assessment or utilize existing assessment revenues to finance the installation, construction or replacement of drainage and flood control facilities as well as the street and road improvements (with some limitations). While such activities are permitted under the 1982 Act, the budget and assessments for this District only provide for normal maintenance and operation of the improvements. Since most major rehabilitation/construction projects result from unforeseen damages, the extent and cost of such projects are not easily predicted and to accumulate funds as part of the normal annual assessments would not be reasonable. If such funding becomes necessary, the City may present a new or increased assessment to the property owners to support the projects.

3.3 Description of Improvements and Services

The purpose of this District is to fund the activities necessary to maintain and service the local streets and the drainage and flood control systems constructed and installed in connection with development of properties within the residential subdivision known as (De Anza Estates), Tract 2498 pursuant to approved development plans and agreements. The improvements may consist of all or a portion of the public streets, drainage and flood control facilities associated with Tract 2498 and the maintenance of these improvements may include but are not limited to the materials, equipment, labor, and incidental expenses deemed necessary to keep these improvements in satisfactory condition. The maintenance of the improvements and related activities shall be funded entirely or partially through the District assessments. The District improvements and services are generally described as:

- Street maintenance that may include but is not limited to the repair and servicing of street surfaces, curbs, gutters, bridges, driveway approaches, sidewalks, barricades, delineation, signage



or other facilities within the public street rights-of-way installed in connection with the development of properties in Tract 2498 and that have been dedicated to the City;

- Storm drain and flood control maintenance that may include but is not limited to inspection, repair and servicing of drainage basins, inlets, catch basins, manholes, outlets, drywells, pumps, filters and storm drain pipes installed in connection with the development of properties of Tract 2498 as well as any off-site improvements and facilities directly associated with the aforementioned infrastructure that is deemed necessary to service or protect the properties including waste water treatment;
- The appurtenant, equipment, materials and service contracts related to the aforementioned improvements and facilities;
- Specifically excluded are those improvements or facilities: located on private property or common areas; that may be provided or maintained by an agency other than the City; that may be provided by another assessment or tax levied by the City; or that may be provided and maintained by a Homeowner's Association or similar entity.

Detailed maps and descriptions of the location and extent of the specific improvements to be maintained by the District are on file in the Office of Public Works and by reference are made part of this Report. Those portions of the District improvements that may be identified as general benefit or will be funded in whole or in part by other revenue sources as part of the approved development agreements, will not be included as part of the District assessments. The net annual cost to provide and maintain the improvements determined to be of special benefit shall be allocated to each property in proportion to the special benefits received.

3.3.1 STREET MAINTENANCE

The street maintenance program may include, but is not limited to: the repair of potholes, cracks or other failures in the asphalt surface; repair or replacement of curbs, gutters, driveway approaches and sidewalks as required as part of maintaining the streets; repair or installation of street signs, barricades, fencing or other delineation; mechanized sweeping and cleaning of the streets and gutters; slurry sealing, overlays and re-striping of the street surfaces. The specific activities and timing of various street and road maintenance services shall be determined by the City's Public Works Department as necessary to extend the life of the streets or to improve traffic circulation and safety as available funding permits. Specifically, the street improvements for this District are identified as:

- Approximately 66,000 square feet of asphalt street surface located on the interior streets of the development identified as El Camino Real north of the Upper Bridge Crossing; Ferrocarril Road from the Graves Creek Bridge northeast to the end of Tract 2498; and De Anza Court.
- Approximately 5,700 linear feet of curb and gutter along El Camino Real, Ferrocarril Road, and De Anza Court, 26 driveway approaches and various street signs within the District;
- Two bridges identified as the Upper Bridge Crossing (located on El Camino Real at the entryway to the tract) and the Graves Creek Bridge (located on Ferrocarril Road located at the entryway to the senior housing development);
- Specifically not included as part of the street maintenance program are the costs associated with major replacements or reconstruction. Although the District assessments will provide funding for regular maintenance and servicing of the improvements that will extend the useful life of the



street improvements, the assessments are not intended to fund major replacements or reconstruction of the street surfaces or adjacent improvements such as curbs, gutters or driveway approaches. The costs of extensive replacement or reconstruction activities such as grinding and resurfacing of the asphalt; and replacement of curbs, gutters driveway approaches and sidewalks is significantly more than the amount that can reasonably be collected annually under the provisions of the 1982 Act. When such repairs or activities are deemed necessary, the City will consider various financing options including new or increased assessments for property owner approval. Also not included as part of the street maintenance program are the street improvements within the senior housing development (street improvements southwest of the Graves Creek Bridge). The street improvements and facilities within the senior housing development shall be maintained and funded through a Homeowner's Association or similar entity.

The Public Works Department shall authorize the operational activities and maintenance of the public street and right-of-way improvements, facilities and services that may include, but are not limited to:

- Regular street sweeping services necessary to control dirt and debris on street surfaces and gutters;
- Annual inspection of street surface and repair of potholes and surface cracks as needed;
- Periodic slurry or overly of street surfaces and driveway approaches (typically one or the other once every five years);
- Periodic re-stripping of traffic lanes, bike lanes, street parking areas, crosswalks and intersections (typically in conjunction with slurry or overly activities);
- Graffiti abatement of public improvements within the street rights-of-way that are maintained by the District including but not limited to sandblasting, repainting and repair of fences, walls, barricades, sidewalks and signage as needed;
- Annual inspection and periodic repair or replacement of decorative street- pavers as needed;
- Annual inspection and minor repairs of curbs, gutters, driveway approaches and sidewalks including partial segment replacements as needed to ensure pedestrian and vehicle safety or the integrity of the street;
- Annual inspection and periodic repair or rehabilitation of street signs and traffic control devices;
- Annual inspection and repair of barricades, street-fencing, delineation or retaining walls within the street rights-of-way as needed.

A portion of the services described above are not performed on an annual basis but rather on a periodic basis, such as slurry sealing or overlaying the asphalt streets, and the funds necessary for these activities are collected in installments as part of the annual assessments. The monies collected each year for these services will be accumulated in a special fund of the District (Reserve Fund or Capital Improvement Fund). The monies accumulated for these activities shall be spent when sufficient funds have been accumulated to perform the services deemed necessary by the City (approximately every five years). This process of accumulating funds (installments) shall continue until such time the District is dissolved; or the City determines that such funding procedures require modification. Changes in the process of accumulating funds that would result in an increase to the annual assessment rate must be presented to the property owners for approval prior to imposing such an increase.

3.3.2 STORM DRAIN AND FLOOD CONTROL MAINTENANCE

The storm drain and flood control system associated with the District may include but is not limited to: drainage basins and bio-filters; channel ways; storm drain inlets, catch basins, manholes, outlets; drywells, pumps, filters and pipes. The storm drain system to be maintained primarily involves on-site facilities (within the District boundaries) but may also include off-site improvements such as water treatment equipment, facilities or services mandated or required by Federal, State or County regulations for water pollution control. The annual assessments for this District are intended to support a storm drain and flood control maintenance program that will adequately regulate and control storm water runoff resulting from the development of properties within the District. This maintenance program may include but is not limited to: inspection and documentation of the system; cleaning, servicing or repair of the facilities and equipment; and the partial replacement or rehabilitation of equipment and facilities. The storm drain and flood control system includes but is not limited to:

- A single drainage basin of approximately 9,000 square feet;
- A total of approximately three (3) inlets, catch basins, manholes or outlets located within the single-family residential portion of Tract 2498;
- Approximately 200 linear feet of 24 inch storm drain pipe.

The Public Works Department shall authorize and schedule the operational activities and maintenance of the storm drain and storm water pollution treatment infrastructure, facilities and services that may include, but are not limited to:

- Cleaning of storm drain inlets, catch basins, manholes and pipes as needed;
- Stencil maintenance and documentation of facilities as required by Federal, State or County regulations;
- Cleaning and landscape maintenance of the drainage basins, bio-filter areas or channel ways as needed;
- Debris removal and pest control in and around the storm drain facilities as needed;
- Minor repairs and maintenance of the storm drain inlets, catch basins and outlets as needed;
- Street sweeping services necessary to control debris and water flow for the storm drain system; and,
- The operational costs related to NPDES compliance requirements.

A portion of the services described above are not performed on an annual basis but rather on a periodic basis such as minor repairs to the storm drain inlets, catch basins and outlets, and the funds necessary for these activities are collected in installments as part of the annual assessments. The monies collected each year for these services will be accumulated in a special fund of the District (Reserve Fund or Capital Improvement Fund). The monies accumulated for these activities shall be spent as needed to perform the services deemed necessary by the City. This process of accumulating funds (installments) shall continue until such time the District is dissolved; or the City determines that such funding procedures require modification. Changes in the process of accumulating funds that would result in an increase to the annual assessment rate must be presented to the property owners for approval prior to imposing such an increase.

4. ESTIMATE OF COSTS

Budget	Zone A (Senior Housing)	Zone B (SF-Residential)	2024/2025 Assessment
DIRECT COSTS			
Streets, Roads & Storm Drain Improvements			
Drainage Maintenance Services	\$0	\$3,610	\$3,610
Street Sweeping Services	660	990	1,650
Inspection & Operational Services - Roads, Drainage	1,664	2,496	4,160
Traffic Sign Replacement	0	0	0
Street Maintenance	2,992	4,488	7,480
Total Annual Direct Costs	\$5,316	\$11,584	\$16,900
ADMINISTRATION EXPENSES			
City Annual Administration	\$810	\$810	\$1,620
Engineer's Report & Services	1,945	1,945	3,890
Public Noticing	50	50	100
Total Administration Costs	\$2,805	\$2,805	\$5,610
TOTAL DIRECT & ADMINISTRATION COSTS	\$8,121	\$14,389	\$22,510
CAPITAL RESERVE COLLECTIONS/(USES)			
Collection for Street Surface Activities	\$6,638	\$9,957	\$16,111
Collection for Street Re-striping	35	53	86
Collection for Repair Activities: Curbs, Gutters, Approaches & Sidewalks	120	179	290
Collection for Debris Removal	127	190	307
Collection for Bridges	8,594	5,729	14,323
Collection for Storm Drain Infrastructure	46	68	114
Total Capital Reserve Collections/(Uses)	\$15,559	\$16,177	\$31,736
LEVY ADJUSTMENTS			
Interest Income - Improvement Fund	(\$6,599)	(\$9,112)	(\$15,711)
Interest Income - Operating Reserve Fund	(180)	(249)	(429)
Reserve Fund Collection (Use)	(3,169)	(4,376)	(7,544)
Total Levy Adjustments	(\$9,947)	(\$13,747)	(\$23,684)
BALANCE TO LEVY	\$13,733	\$16,829	\$30,562
DISTRICT STATISTICS			
Total Parcels	61	28	89
Parcels Levied	60	26	86
Total EBU ⁽¹⁾	37.50	26	63.50
Proposed Levy per EBU	\$342.48	\$681.50	
Maximum Levy per EBU	\$920.14	\$1,137.59	
FUND BALANCE INFORMATION			
Beginning Operating Reserve Balance	\$6,113	\$8,441	\$14,554
Operational Reserve Interest	180	249	429
Surplus Transfer from Improvement Fund	9,801	13,535	23,335
Operational Reserve Collection (Use)	(9,947)	(13,737)	(23,684)
Ending Operating Reserve Balance	\$6,146	\$8,488	\$14,634
Beginning Improvement Fund Balance	\$214,779	\$296,599	\$495,744
Improvement Fund Interest	6,599	9,112	15,711
Surplus Transfer to Operations Fund	(9,801)	(13,535)	(23,335)
Improvement Fund Collection/(Use)	15,559	16,177	31,736
Estimated Ending Improvement Fund Balance	\$227,136	\$308,354	\$535,490

⁽¹⁾ Levy per EBU rate does not include the County of San Luis Obispo fee of \$2.00 per parcel



5. METHOD OF ASSESSMENT

5.1 General

The 1982 Act permits the establishment of assessment districts by agencies for the purpose of providing for the maintenance, operation and servicing of drainage and flood control improvements as well as streets, roads and appurtenant facilities. The 1982 Act further requires that the cost of these improvements be levied according to benefit rather than assessed value:

“The amount of the assessment imposed on any parcel of property shall be related to the benefit to the parcel which will be derived from the provision of the service”.

Furthermore:

“The annual aggregate amount of the assessment shall not exceed the estimated annual cost of providing the service, except that the legislative body may, by resolution, determine that the estimated cost of work authorized ... is greater than can be conveniently raised from a single annual assessment and order that the estimated cost shall be raised by an assessment levied and collected in installments.... The revenue derived from the assessment shall not be used to pay the cost of any service other than the service for which the assessment was levied.”

The method of apportionment described in this Report for allocation of special benefit assessments utilizes commonly accepted engineering practices in compliance with the provisions of the 1982 Act and the California Constitution. The formulas used for calculating assessments reflects the composition of parcels within the District and the improvements and services provided, to fairly apportion the costs based on the special benefits to each parcel.

5.2 Benefit Analysis

Each of the proposed improvements and services, and the associated costs and assessments have been carefully reviewed, identified and allocated based on special benefit pursuant to the provisions of the 1982 Act and the California Constitution. The street and storm drain improvements associated with this District were necessary and essential requirements for the orderly development of the properties within the District to their full potential, consistent with the development plans and applicable portions of the City General Plan. As such the ongoing operation, servicing and maintenance of those improvements would otherwise be the direct financial obligation of each individual property owner. Since each parcel to be assessed within the District could not have been developed in the absence of these improvements and facilities, each parcel has a direct investment in the proper maintenance of the improvements that is over and above any general benefits that may be conferred by such improvements and services.

The ongoing maintenance and servicing of the District improvements is an integral part of the appearance, use and preservation of the properties within the District and such services to be funded by annual assessments confer a particular and distinct special benefit to those parcels. The proper maintenance of streets and appurtenant facilities allows individual parcels to be used to their fullest extent by ensuring the safe and

efficient movement of people and goods to and from the benefiting properties Likewise, the maintenance and servicing of the storm drain system ensures proper water flow and control of excess water during periods of rain, which is essential to preservation and protection of private property. Together the maintenance and servicing of the streets and storm drain system contributes to a specific enhancement of each of the parcels within the District and the absence of adequate maintenance and servicing of the District improvements could eventually have a negative impact on properties within the District.

Although the improvements may include public streets and storm drain facilities that connect to similar facilities outside the District boundaries, it is clear that the construction and installation of these improvements were only necessary for the development of properties within the District. As such, these improvements were not required nor necessarily desired by any properties or developments outside the District boundary and any public access or use of the improvements by others is incidental. Therefore, it has been determined that the ongoing maintenance, servicing and operation of the District improvements provide no measurable general benefit to properties outside the District or to the public at large, but clearly provide distinct and special benefits to properties within the District. Any improvement or portion thereof (particularly off-site storm drain facilities) that may be considered general benefit shall be funded by other revenue sources and not included as part of the special benefit assessments allocated to properties within this District. However, the costs associated with installation or improvement of any off-site facilities that benefit the parcels within this District as well as other properties (shared benefit) may be allocated to the parcels within the District based on their proportional special benefit from such improvements.

5.3 Assessment Methodology

The costs associated with the improvements and services shall be fairly distributed among the parcels based upon the special benefit received by each parcel. Additionally, in compliance with the California Constitution Article XIII D Section 4, each parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred to that parcel. The benefit formula used to determine the assessment obligation is therefore based upon both the improvements that benefit the parcels within the District as well as the proposed land use of each property as compared to other parcels that benefit from those specific improvements.

The method of apportionment established for this District and described herein, reflects the proportional special benefit each property receives from the improvements and services based on the actual or proposed land use of that parcel as compared to other properties within the District based on similarities and differences in parcel land use.

5.3.1 ZONES OF BENEFIT:

While it has been determined that the improvements to be maintained by the District are entirely a special benefit to properties within the District (No measurable general benefit), upon review of the various improvements, the location and need for such improvements and the proposed development of properties within the District it has been determined that the improvements and services that will benefit the single-family residential properties are not identical to the improvements and services that will benefit the senior housing development, although they do share in the benefit of some of the improvements. Therefore, it has been determined that two separate zones of benefit are required to appropriately allocate the costs of

maintaining the improvements and establish proportional special benefit assessments. The properties associated with the senior housing development have been identified and designated as “Zone A”, and the single-family residential properties within Tract 2498 have been identified and designated as “Zone B” based on the improvements associated with those properties.

- (1) Zone A (Senior Housing Portion of Tract 2489)** — It has been determined that these properties benefit and shall proportionately share in the costs associated with maintaining and servicing the Upper Bridge Crossing, El Camino Real and the western portion of Ferrocarril Road leading into these properties. It has also been determined that the construction of the Graves Creek Bridge was only necessary for the development of these properties and therefore the cost to service and maintain this facility shall be entirely allocated to these properties. Conversely, the storm drain improvements that will be maintained by the City within Tract 2498 have been constructed as part of developing the twenty-six single-family residential properties and it has been determined that the senior housing properties do not receive direct and special benefit from those particular improvements. While these properties will not be assessed for the storm drain improvements, it should be noted that some storm drain facilities will be constructed as part of the senior housing development; however these improvements are not included in this District and will be provided and maintained by a Homeowner’s Association or similar entity.
- (2) Zone B (Single-Family Residential Portion of Tract 2498)** — Along with the properties in Zone A, the single-family residential properties within Tract 2498 benefit and shall proportionately share in the costs associated with maintaining and servicing the Upper Bridge Crossing and El Camino Real. In addition, the overall development of these particular properties required the construction and installation of the street improvements on Ferrocarril Road and De Anza Court as well as the entire storm drain system to be maintained by the District. Therefore, the cost of maintaining and servicing these particular improvements shall be budgeted and allocated proportionately to only those properties in Zone B. Conversely, the construction of the Graves Creek Bridge was only necessary for the development of the senior housing and the properties within Zone B will not share in the cost of maintaining this particular facility.

5.3.2 EQUIVALENT BENEFIT UNITS:

To assess benefits equitably it is necessary to relate each property’s proportional special benefits to the special benefits of the other properties within the District. The method of apportionment established for most districts formed under the 1982 Act utilizes a weighted method of apportionment known as an Equivalent Benefit Unit (EBU) methodology that uses the single-family home site as the basic unit of assessment. A single-family home site equals one Equivalent Benefit Unit (EBU) and the other land uses are converted to a weighted EBU based on an assessment formula that equates the property’s specific development status, type of development (land use), and size of the property, as compared to a single-family home site.

Although the Equivalent Benefit Unit method of apportioning special benefit is most commonly used and applied to districts that have a wide range of land use classifications (residential and non-residential use), this District is comprised of only residential properties and the following apportionment analysis of special benefit addresses only residential land uses. Not all land use types described in the following are necessarily applicable to the development of properties within this District, but are presented for comparison purposes to support the proportional special benefit applied to those land use types within the District.



5.3.3 EBU APPLICATION BY LAND USE:

- (1) **Single-family Residential** — This land use is defined as a fully subdivided residential home site with or without a structure. This land use is assessed 1.0 EBU per lot or parcel. This is the base value that the other properties are compared and weighted against (i.e. Equivalent Benefit Unit “EBU”).
- (2) **Multi-family Residential** — This land use is defined as a fully subdivided residential parcel that has more than one residential unit developed on the property. (This land use typically includes apartments, duplexes, triplex etc., but does not generally include condominiums, town-homes or mobile home parks). Based on average population densities and size of the structure as compared to a typical single-family residential unit, multi-family residential parcels shall be proportionately assessed for the parcel’s total number of residential units utilizing a sliding benefit scale. Although multi-family properties typically receive similar benefits to that of a single-family residential, it would not be reasonable to conclude that on a per unit basis, the benefits are equal. Studies have consistently shown that the average multi-family unit impacts infrastructure approximately 75% as much as a single-family residence (Sample Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition). These various studies indicate that most public improvements and infrastructure are utilized and impacted at reduced levels by multi-family residential units and a similar reduction in proportional benefit is appropriate. Furthermore, it is also reasonable to conclude that as the density (number of units) increases, the proportional benefit per unit tends to decline because the unit size and people per unit usually decreases. Based on these considerations and the improvements provided by this District, an appropriate allocation of special benefit for multi-family residential properties as compared to a single-family residential property is best represented by the following special benefit assignment: 0.75 EBU per unit for the first 50 units; 0.50 EBU per unit for units 51 through 100; and 0.25 EBU per unit for the remaining units.
- (3) **Condominium/Town-home Units** — Condominiums and town-homes tend to share attributes of both single-family residential and multi-family residential properties and for this reason are identified as a separate land use classification. Like most single-family residential properties, these properties are not usually considered rental property and generally, the County assigns each unit a separate APN or assessment number. However, condominiums and town-homes often have similarities to multi-family residential properties in that they are generally zoned medium to high density and in some cases may involve multiple units on a single APN. In consideration of these factors, it has been determined that an appropriate allocation of special benefit for condominiums, town-homes and similar residential properties is best represented by an assignment of 0.75 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to an APN. (There is no adjustment for parcels with more than five units).
- (4) **Modified Housing/Senior Housing Units** — Modified Housing or Senior Housing is generally defined as residential units that would typically be classified as Condominiums or Town-homes, but have specific deed restrictions that may limit the size or use of all units within the development. This classification is not applicable to individual single-family residential parcels unless all single-family residential parcels within that particular development or subdivision have the same restrictions.

(For example: One or more single-family units within a subdivision that are deed restricted as “Affordable Housing” or “Senior Housing” does not qualify for this land use classification, unless all the units within that development have the same or similar deed restrictions.) Since this classification generally involves Condominium or Town-home type properties, that are generally assigned 0.75 EBU, it has been determined that an appropriate allocation of special benefit for modified housing units or senior housing units is best represented by an assignment of 0.625 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to a single APN.

- (5) Planned-Residential Development** — This land use is defined as any property for which a tentative or final tract map has been filed and approved (a specific number of residential lots and units has been identified) and the property is expected to be subdivided within the fiscal year or is part of the overall improvement and development plan for the District. This land use classification often times involves more than a single parcel (e.g. the approved tract map encompasses more than a single APN). Each parcel that is part of the approved tract map shall be assessed proportionately for the proposed or estimated residential type and units to be developed on that parcel as part of the approved tract map. Accordingly, each parcel is assigned an appropriate number of benefit units that reflects the development of that property at build-out. (The EBU assigned to each parcel shall represent the combination of single-family, condominium, multi-family units to be developed).
- (6) Vacant Residential** — This land use is defined as property currently zoned for residential development, but a tentative or final tract map for the property has not yet been approved. Based upon the opinions of professional appraisers who appraise market property values for real estate in California, the land value portion of a property typically ranges from 20 to 30 percent of the total value of a developed residential property (the average is about 25 percent). Although the assessed value of an individual property is not a direct reflection of the property’s special benefit, this general correlation between land value and structure value does provide a reasonable basis for apportioning special benefit for vacant residential properties. Utilizing this twenty-five percent (25%) apportionment and the number of single-family residential units typically developed per acre of land (an average of 4 residential units per acre) an Equivalent Benefit Unit of 1.0 EBU per acre (4 units per acre x 25%) is derived and presents an appropriate apportionment of special benefit for vacant residential properties. Recognizing that the full and timely utilization of vacant property is reduced as the size of the property increases, it has been determined that the maximum EBU assigned to a vacant residential parcel shall not exceed 25.0 EBU (parcels in excess of 25 acres are assigned 25.0 EBU). Parcels less than one acre, shall be assigned a minimum of 1.0 EBU (similar to a vacant lot within a residential tract).
- (7) Exempt Parcels** — This land use identifies properties that are not assessed and are assigned 0.0 EBU. This land use classification may include but is not limited to:
- Lots or parcels identified as public streets and other roadways (typically not assigned an APN by the County);
 - Dedicated public easements including open space areas, utility rights-of-way, greenbelts, parkways, parks or other publicly owned properties that are part of the District improvements or may provide other benefits to private properties within the District.;



- Private properties that cannot be developed independently from an adjacent property, such as common areas, sliver parcels or bifurcated lots or properties with very restrictive development use;

These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment, but shall be reviewed annually by the assessment engineer to confirm the parcels current development status. Government owned properties or public properties are not necessarily exempt properties and shall be subject to special benefit assessment unless it qualifies for an exempt status.

(8) Special Cases — In many districts where multiple land use classifications are involved, there are usually one or more properties for which the standard land use classifications do not accurately identify the special benefits received from the improvements. For example, a parcel may be identified as a Vacant Residential property, however only a small percentage of the parcel’s total acreage can actually be developed. In this case, an appropriate calculation would be based on the net acreage that can be utilized rather than the gross acreage of the parcel.

The following table provides a summary of land use classifications and the Equivalent Benefit Unit calculations previously outlined.

Property Type	Equivalent Benefit Units	Multiplier
Single-family Residential	1.00	Per Unit/Lot/Parcel
Multi-family Residential	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Condominium/Townhome Units	0.75	Per Unit
Modified Housing/Senior Housing Units	0.625	Per Unit
Planned Residential Development	1.00	Per Planned SF Residential Lot
	0.75	Per Planned Condominium
	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Vacant Residential Land	1.00	Per Acre
Exempt Parcels	0.00	Per Parcel

The following formula is used to calculate each parcel’s EBU (proportional benefit).

$$\text{Parcel Type EBU} \times \text{Acres or Units} = \text{Parcel EBU}$$

The total number of Equivalent Benefit Units (EBU’s) is the sum of the individual EBU’s applied to parcels that receive special benefit from the improvements. An assessment amount per EBU (Assessment Rate) for the improvements is established by taking the total cost of the improvements and dividing that amount by the total number of EBU’s of the parcels benefiting from the improvements. This Rate is then applied back to each parcel’s individual EBU to determine the parcel’s proportionate benefit and assessment obligation for the improvements.



Total Balance to Levy / Total EBU = Levy per EBU

Levy per EBU x Parcel EBU = Parcel Levy Amount

5.4 Assessment Range Formula

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218 (California Constitution Articles XIII C and XIII D), legislative changes in the Brown Act defined a "new or increased assessment" to exclude certain conditions. These conditions included "any assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed." This definition and conditions were later confirmed through Senate Bill 919 (Proposition 218 implementing legislation).

The purpose of establishing an Assessment Range Formula is to provide for reasonable increases and inflationary adjustment to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District formation, the notice and assessment ballots presented to the property owners for approval included a maximum assessment amount for Fiscal Year 2005/2006 (initial maximum assessment), identification of the corresponding maximum assessment rate and a summary of the Assessment Range Formula described herein.

The Assessment Range Formula for this District shall be applied to the future assessments and is generally defined:

- If the proposed annual assessment (levy per EBU) for the upcoming fiscal year is less than or equal to the adjusted Maximum Assessment Rate, then the proposed annual assessment is not considered an increased assessment.
- The Maximum Assessment Rate is equal to the (Initial) Maximum Assessment Rate established for Fiscal Year 2005/2006 adjusted annually by the greater of, three percent (3%) or the annual percentage change in the Consumer Price Index (CPI) of "All Urban Consumers" for the San Francisco-Oakland-San Jose Area from February to February. The Maximum Assessment rate was increased by 3.000% for Fiscal Year 2024/25.

Beginning with Fiscal Year 2006/2007 and each fiscal year thereafter, the Maximum Assessment Rate has been recalculated and a new Maximum Assessment Rate established for the fiscal year utilizing the Assessment Range Formula described above. The Maximum Assessment Rate is calculated independent of the District's annual budget and proposed assessment. The annual percentage change in CPI is based on available data provided by the U.S. Department of Labor; Bureau of Labor Statistics at the time the annual Report is prepared. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the City Council for determining fluctuations in the cost of living. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the change the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

Any proposed annual assessment (rate per EBU) less than or equal to the calculated (adjusted) Maximum Assessment Rate is not considered an increased assessment, even if the proposed assessment is significantly greater than the assessment applied in the prior fiscal year. Likewise, modifications to the method of



apportionment that increase the proportional special benefit assigned to a particular land use classification would be considered an increased assessment. Conversely, reductions in the proportional special benefit assigned to a land use classifications is permitted. Changes in land use or size of an individual property resulting in an assessment increase, is not considered an increased assessment.

To impose a new or increased assessment other than the annual inflationary adjustment provided by the preceding Assessment Range Formula, the City must comply with the provisions of the California Constitution Article XIID Section 4c, that requires a public hearing and certain protest procedures including mailed notice of the public hearing and property owner protest balloting. Property owners through the balloting process must approve a proposed new or increased assessment before such an assessment may be imposed.

6. ASSESSMENT DIAGRAM

The parcels within the Street and Storm Drain Maintenance District No. 03 (De Anza Estates) consist of the lots, parcels and subdivisions of land located in the residential development known as De Anza Estates, Tract 2498. The District covers approximately seventy-six acres (75.84 acres) in the northern portion of the City of Atascadero.

The following map is based on the District Diagram, the San Luis Obispo County Assessor's Maps and the San Luis Obispo County Assessor's information and identifies the parcels of land within the proposed District, as the same existed at the time the District was formed. The combination of the District Diagram on file with the City Clerk and the Assessment Roll contained in this Report constitute the District Assessment Diagram.



7. ASSESSMENT ROLL

Parcel identification for each lot or parcel within the District is based on the Assessment Diagram presented herein and is based on available parcel maps and property data from the San Luis Obispo County Assessor's Office at the time the Engineer's Report was prepared. A listing of the proposed lots and parcels to be assessed within this District along with the assessment amounts is provided herein.

Non-assessable lots or parcels may include, but are not limited to public streets and other roadways (typically not assigned an APN by the County); dedicated public easements, open space areas, right-of-ways, common areas; landlocked parcels, small parcels vacated by the County, bifurcated lots, and any other property that cannot be developed or has little or no value. These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment.

If any parcel submitted for collection is identified by the County Auditor/Controller to be an invalid parcel number for the fiscal year, a corrected parcel number and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel or parcels shall be based on the method of apportionment and assessment rate described in this Report as approved by the City Council. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the assessment amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment amount.

City of Atascadero
Street & Storm Drain Maintenance No. 3
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-044-002	755 N FERROCARRIL RD	Single Family Residential	1.000	\$1,137.60	\$681.50
049-044-003	765 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-004	805 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-005	905 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-006	955 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-007	1025 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-008	1055 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-009	1155 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-010	1255 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-011	1305 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-012	1355 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-013	1200 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-014	1100 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-015	1000 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-016	950 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-017	860 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-018	850 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-019	870 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-020	880 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-044-021	705 DE ANZA CT	Single Family Residential	1.000	1,137.60	681.50
049-044-022	725 DE ANZA CT	Single Family Residential	1.000	1,137.60	681.50
049-044-023	750 DE ANZA CT	Single Family Residential	1.000	1,137.60	681.50
049-044-024	740 DE ANZA CT	Single Family Residential	1.000	1,137.60	681.50
049-044-025	720 DE ANZA CT	Single Family Residential	1.000	1,137.60	681.50
049-044-026	700 DE ANZA CT	Single Family Residential	1.000	1,137.60	681.50
049-044-033	655 N FERROCARRIL RD	Single Family Residential	1.000	1,137.60	681.50
049-046-002	503 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-003	505 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-004	507 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-005	509 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-006	511 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-007	513 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-008	515 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-009	517 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-010	519 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-011	521 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-012	524 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-013	526 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-014	528 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-015	530 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-016	532 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-017	534 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 3
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-046-018	536 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-019	538 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-020	540 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-021	542 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-022	572 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-023	574 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-024	576 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-025	578 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-026	580 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-027	582 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-028	584 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-029	586 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-030	588 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-031	590 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-032	592 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-033	551 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-034	553 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-035	555 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-036	557 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-037	559 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-038	561 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-039	563 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-040	565 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-041	567 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-042	595 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-043	597 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-044	599 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-045	603 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-046	605 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-047	601 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-048	609 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-049	607 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-050	610 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-051	612 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-052	614 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-053	616 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-054	618 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-055	620 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-056	622 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-057	624 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-058	626 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-059	628 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 3
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-046-060	630 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
049-046-061	501 N FERROCARRIL RD	Senior Housing Units	0.625	711.00	214.04
86 Accounts			63.500		\$30,561.40
86 Total Accounts			63.500		\$30,561.40

Slight variances may occur due to rounding

DRAFT RESOLUTION D

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, INITIATING PROCEEDINGS FOR ANNUAL LEVY OF ASSESSMENTS FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 3 (DE ANZA ESTATES) FOR FISCAL YEAR 2024/2025 PURSUANT TO THE PROVISIONS OF PART 2 OF DIVISION 15 OF THE CALIFORNIA STREETS AND HIGHWAYS CODE

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council has, by previous Resolutions, formed the Atascadero Landscaping and Lighting Maintenance District No. 3 (hereafter referred to as “District”) pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2 of Division 15 of the Streets and Highways Code of California, beginning with Section 22500* (hereafter referred to as the “Act”) that provides for levy and collection of assessments by the County of San Luis Obispo for the City of Atascadero to pay the maintenance and services of lighting facilities, landscaping, and appurtenant facilities and operations related thereto; and

WHEREAS, the District and the associated assessments are in compliance with the provisions of California Constitution Article XIID; and

WHEREAS, the City Council has retained NBS for the purpose of assisting with the Annual Levy of the District and to prepare and file a report with the City Clerk in accordance with the Act.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. Engineer’s Annual Levy Report: The City Council hereby orders NBS to prepare the Engineer’s Annual Levy Report concerning the levy of assessments for the District in accordance with *Chapter 3, Section 22622* of the Act.

SECTION 2. Proposed Improvements and Any Substantial Changes in Existing Improvements: The improvements within the District include the ongoing operation, administration, maintenance, servicing and incidental expenses related to the dedicated landscape areas, public street lighting and appurtenant facilities authorized pursuant to the Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District. The Engineer's Annual Levy Report describes any new improvements or substantial changes in existing improvements.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ____th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION E

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, FOR PRELIMINARY APPROVAL OF THE ENGINEER'S ANNUAL LEVY REPORT FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 3 (DE ANZA ESTATES) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as "City Council") does resolve as follows:

WHEREAS, the City Council has, by previous Resolutions, ordered the preparation of an Engineer's Annual Levy Report (hereafter referred to as the "Report") for the district known and designated as the Atascadero Landscaping and Lighting Maintenance District No. 3 (hereafter referred to as the "District") pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2 of Division of the Streets and Highways Code of California, beginning with Section 22500* (hereafter referred to as the "Act"); and

WHEREAS, the District and the associated assessments are in compliance with the provisions of California Constitution Article XIID; and

WHEREAS, the City Council has now been presented with the Report as required by *Chapter 1, Article 4, Section 22566* of said Act; and

WHEREAS, the City Council has carefully examined and reviewed the Report as presented and is preliminarily satisfied with the Report, each of the budget items and documents as set forth therein and is satisfied on a preliminary basis that the proposed assessments have been spread in accordance with the benefits received from the improvements, operation, maintenance, and services to be performed within each benefit zone as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The above recitals are true and correct.

SECTION 2. That the presented Report consists of the following:

- a. A Description of the Improvements
- b. The Annual Budget (Costs and Expenses of Services, Operation, and Maintenance)
- c. The Method of Apportionment that details the method of calculating each parcel's proportional special benefits and annual assessment.
- d. The District Roll containing the proposed assessment for each parcel within the District for Fiscal Year 2024/2025.

SECTION 3. The Report is hereby approved on a preliminary basis and ordered to be filed in the Office of the City Clerk as a permanent record and to remain open to public inspection.

SECTION 4. That the City Clerk shall certify to the passage and adoption of this Resolution, and the minutes of this meeting shall so reflect the presentation of the Report.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION F

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AND COLLECT ASSESSMENTS FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 03 (DE ANZA ESTATES) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) does resolve as follows:

WHEREAS, The City Council has by previous Resolution initiated proceedings for fiscal year 2024/2025 regarding the levy and collection of assessments for the Atascadero Landscaping and Lighting District No. 3 (hereafter referred to as the “District”). Pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with section 22500)* (hereafter referred to as the “Act”), assessments for the District shall be levied and collected by the County of San Luis Obispo for the City of Atascadero to pay the maintenance and services of the improvements and facilities related thereto; and

WHEREAS, the proposed District assessments for fiscal year 2024/2025 are less than or equal to the maximum assessments previously approved in accordance with the requirements of the California Constitution, Article XIID; and

WHEREAS, there has now been presented to this City Council an Engineer’s Annual Levy Report (hereafter referred to as the “Engineer’s Report”), and said Engineer’s Report has been filed with the City Clerk in accordance with the Act; and

WHEREAS, the City Council has examined and reviewed the Engineer’s Report as presented and is satisfied with the Report, each of the budget items and documents as set forth therein and is satisfied that the proposed assessments contained therein, have been spread in accordance with the benefits received from the improvements, operation, maintenance and services to be performed within the District, as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The above recitals are true and correct.

SECTION 2. The City Council hereby declares its intention to seek the annual levy and collection of assessments within the District pursuant to the Act, over and including the lands, lots and parcels within the District boundary. The City Council further declares its intention to levy and collect assessments on such land to pay the annual costs and expenses of the improvements and services described in Section 4 of this Resolution, for fiscal year 2024/2025.

SECTION 3. The boundaries of the District are described in the Engineer’s Report and are consistent with the boundary established and described in the original formation documents, on file with the City Clerk, and incorporated herein by reference. The District is within the boundaries of the

City of Atascadero, within the County of San Luis Obispo, State of California and includes the territory known as De Anza Estates and referred to as the “Atascadero Landscaping and Lighting District No. 03”.

SECTION 4. The improvements within the District include the ongoing maintenance, operation and servicing of local landscaping and street lighting improvements established or installed in connection with development of properties within the District. These improvements generally include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or right-of-ways constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District.

SECTION 5. The proposed assessments for fiscal year 2024/2025, as outlined in the Engineer’s Report, do not exceed the maximum assessment approved by the property owners through a property owner balloting proceeding conducted in 2005. As such, the proposed assessments do not constitute an increased assessment and do not require additional property owner approval in accordance with the requirements of the California Constitution, Article XIID.

SECTION 6. The City Council hereby declares its intention to conduct a Public Hearing concerning the District and the levy of assessments in accordance with Chapter 3, Section 22626 of the Act.

SECTION 7. Notice is hereby given that a Public Hearing on these matters will be held by the City Council on Tuesday, June 25, 2024, at 6:00 p.m., at the City Council Chambers, 6500 Palma Avenue, Atascadero, California or as soon thereafter as feasible. At the Public Hearing, all interested persons shall be given an opportunity to hear and be heard on the proposed assessment to be levied for fiscal year 2024/2025 as contained in the Engineer’s Report on file in the City Clerk’s Office.

SECTION 8. The City Clerk shall give notice of the time and place of the Public Hearing to all property owners within the District pursuant to Sections 22626, 22552 and 22553 of the Act and 6061 of the Government Code by publishing this Resolution of Intention in a local newspaper one time at least 10 days prior to the Public Hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

CITY OF ATASCADERO

Fiscal Year 2024/25 Engineer's Report For:

Landscaping and Lighting District

No. 03 (De Anza Estates)

May 2024

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

CITY OF ATASCADERO
Landscaping & Lighting District No. 03
(De Anza Estates)

6500 Palma Avenue
Atascadero, CA 93422
Phone – (805) 461-5000
Fax – (805) 461-7612

CITY COUNCIL

Heather Moreno, Mayor

Susan Funk, Mayor Pro Tem

Charles Bourbeau, Council Member

Mark Dariz, Council Member

Heather Newsom, Council Member

AGENCY STAFF

Jim Lewis, City Manager

Jeri Rangel, Administrative Services Director

Cindy Chavez, Deputy Director of Administrative Services

NBS

Tim Seufert, Client Services Director

Adina McCargo, Project Manager

Danielle Robison, Administrator

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1. ENGINEER’S LETTER

WHEREAS, on August 9, 2005, by Resolution No. 2005-074, the City Council of the City of Atascadero (the “City”), State of California, in accordance with and pursuant to the Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500 (the “1972 Act”) established the City of Atascadero Landscaping and Lighting District No. 03 De Anza Estates (the “District”); and

WHEREAS, on May 28, 2024, the City Council, under the 1972 Act, adopted its Resolution Initiating Proceedings for the Annual Levy of Assessments and Ordering the Preparation of an Engineer’s Report for the District; and

WHEREAS, the Resolution Initiating Proceedings directed NBS to prepare and file a report describing the general nature, location, and extent of the improvements to be maintained; an estimate of the costs of the maintenance, operations, and servicing of the improvements for the District for the referenced fiscal year; a diagram for the District, showing the area and properties to be assessed; and an assessment of the estimated costs of the administration, maintenance, operations, and servicing the improvements, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

NOW THEREFORE, the assessments as detailed in this Engineer’s Report and as summarized in the table below are made to cover the portion of the estimated costs of maintenance, operation and servicing of the improvements to be paid by the assessable real property within the District in proportion to the special benefit received. The following table summarizes the proposed assessment for Fiscal Year 2024/25:

FY 2024/25 Budget Summary

Description	Total Costs	Costs Not Assessed	Proposed Assessment	Total Benefit Units	Maximum Rate	Proposed Rate Per BU
Annual Maintenance	\$12,110	(\$895)	\$11,215			
Special Projects	5,000	0	5,000			
Administration	7,620	0	7,620			
Capital Reserve	1,614	(500)	1,114			
Collections/(Use)	(10,469)	1,395	(9,074)			
Levy Adjustments						
Total	\$15,875	\$0	\$15,875	63.50	\$1,631.17	\$250.00

I, the undersigned, respectfully submit the enclosed Engineer’s Report and, to the best of my knowledge, information, and belief, the Engineer’s Report, Assessments, and the Assessment Diagram herein have been prepared, computed, and levied in accordance with the assessment methodology adopted, approved, and ordered by the City Council of the City of Atascadero and the 1972 Act.

City Engineer



2. EXECUTIVE SUMMARY

Pursuant to the provisions of the Landscaping and *Lighting Act of 1972*, being *Part 2 of Division 15* of the *California Streets and Highways Code*, commencing with *Section 22500* (hereafter referred to as the “1972 Act”), and in compliance with the substantive and procedural requirements of the California State Constitution Article XIID (hereafter referred to as “Article XIID”), the City Council of the City of Atascadero, County of San Luis Obispo, State of California (hereafter referred to as “City”), executed the proceedings required for the establishment of the special benefit assessment district designated as:

Landscaping and Lighting District No. 03 (De Anza Estates)

(hereafter referred to as the “District”), which includes the lots and parcels of land within the residential subdivision known as De Anza Estates, Tract 2498 within the City limits of the City. This Engineer’s Report (hereafter referred to as the “Report”) has been prepared in connection with the levy and collection of annual assessments related thereto for Fiscal Year 2024/25, as required pursuant to Chapter 1, Article 4 of the 1972 Act.

The City Council formed the District, and provided for the levy and collection of annual assessments on the County tax rolls to provide ongoing funding for the costs and expenses required to service and maintain the landscaping and lighting improvements associated with and resulting from the development of properties within the District. The improvements to be provided by the District and the assessments described herein are made pursuant to the 1972 Act and the substantive and procedural provisions of Article XIID.

This Report describes the District, the improvements, and the proposed assessments to be levied against properties in connection with the special benefits the properties will receive from the maintenance and servicing of the District improvements. The annual assessments will provide a funding source for the continued operation and maintenance of public landscaping and lighting improvements installed in connection with the development of properties within the District.

The improvements and assessments described in this Report are based on the planned development of properties within the District and represent an estimate of the direct expenditures, incidental expenses, and fund balances that will be necessary to maintain and service the improvements. The boundaries of the District, the proposed improvements, the method of apportionment, and assessments described herein are based on current development plans and specifications for Tract 2498; and by reference these plans and specifications are made part of this Report.

The word “parcel,” for the purposes of this Report, refers to an individual property assigned its own Assessor’s Parcel Number (APN) by the San Luis Obispo County Assessor’s Office. The San Luis Obispo County Auditor/Controller uses Assessor’s Parcel Numbers and specific Fund Numbers to identify properties to be assessed on the tax roll for the special benefit assessments.

As part of the District formation, the City of Atascadero conducted a Property Owner Protest Ballot proceeding for the proposed levy of a new assessment pursuant to the provisions of the California Constitution, Article XIID Section 4. In conjunction with this ballot proceeding, the City Council conducted a noticed public hearing on August 9, 2005 to consider public testimonies, comments and written protests



regarding the formation of the District and levy of assessments. Upon conclusion of the public hearing, property owner protest ballots received were opened and tabulated to determine whether majority protest existed (ballots were weighted based on assessment amounts), and by resolution the City Council confirmed the results of the ballot tabulation. Tabulation of the ballots indicated that majority protest did not exist for the proposed assessments and the assessment range formula presented and described herein, the City Council approved the Report (as submitted or amended), ordered the formation of the District, and approved the levy and collection of assessments. The assessments for Fiscal Year 2005/2006 were submitted to the San Luis Obispo County Auditor/Controller for inclusion on the property tax roll for each parcel.

Each subsequent fiscal year, an Engineer's Report shall be prepared and presented to the City Council describing the District any changes to the District or improvements and the proposed budget and assessments for that fiscal year and the City Council shall hold a noticed public hearing regarding these matters prior to approving and ordering the proposed levy of assessments. If the proposed assessments for the District exceed the maximum assessment described herein (as approved by the property owners), the new or increased assessment must be confirmed through another property owner protest ballot proceeding before such an assessment may be imposed. It should be noted that an increased assessment to an individual property resulting from changes in development or land use does not constitute an increased assessment.

3. PLANS AND SPECIFICATIONS

3.1 Description of the District

The territory within the District consists of the lots, parcels and subdivisions of land within the proposed residential subdivision known as the De Anza Estates, Tract 2498, which encompasses an area of land totaling approximately seventy-six acres (75.84 acres).

This subdivision is planned to include twenty-six (26) Single-Family Residential Units and sixty (60) Modified Housing/Senior Housing Units at build-out. The planned subdivision is situated in the northern portion of the City of Atascadero northeast of Highway 101 and is generally located:

- At the North end of El Camino Real;
- North and East of U.S. HWY 101; and,
- South and West of the Salinas River.

3.2 Improvements and Services Authorized by the 1972 Act

As generally defined by the 1972 Act and applicable to this District, the improvements and associated assessments may include one or more of the following:

- 1) The installation or planting of landscaping;
- 2) The installation or construction of statuary, fountains, and other ornamental structures and facilities;
- 3) The installation or construction of public lighting facilities including, but not limited to street lights and traffic signals;
- 4) The installation or construction of any facilities which are appurtenant to any of the foregoing or which are necessary or convenient for the maintenance or servicing thereof;
- 5) The installation of park or recreational improvements, including, but not limited to, all of the following:
 - a) Land preparation, such as grading, leveling, cutting and filling, sod, landscaping, irrigation systems, sidewalks, and drainage.
 - b) Lights, playground equipment, play courts, and public restrooms.
- 6) The acquisition of land for park, recreational, or open-space purposes or any existing improvement otherwise authorized pursuant to this section.
- 7) The maintenance or servicing, of any of the foregoing including the furnishing of services and materials for the ordinary and usual maintenance, operation, and servicing of any improvement including but not limited to:
 - a) Repair, removal, or replacement of all or any part of any improvements;
 - b) Grading, clearing, removal of debris, the installation or construction of curbs, gutters, walls, sidewalks, or paving, or water, irrigation, drainage, or electrical facilities;
 - c) Providing for the life, growth, health, and beauty of landscaping, including cultivation, irrigation, trimming, spraying, fertilizing, or treating for disease or injury;
 - d) The removal of trimmings, rubbish, debris, and other solid waste;



- e) The cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti;
 - f) Electric current or energy, gas, or other illuminating agent for any public lighting facilities or for the lighting or operation of any other improvements;
 - g) Water for the irrigation of any landscaping, the operation of any fountains, or the maintenance of any other improvements.
- 8) Incidental expenses associated with the improvements including, but not limited to:
- a) The cost of preparation of the report, including plans, specifications, estimates, diagram, and assessment;
 - b) The costs of printing, advertising, and the publishing, posting and mailing of notices;
 - c) Compensation payable to the County for collection of assessments;
 - d) Compensation of any engineer or attorney employed to render services;
 - e) Any other expenses incidental to the construction, installation, or maintenance and servicing of the improvements;
 - f) Costs associated with any elections held for the approval of a new or increase assessment.

3.3 Description of Improvements and Services

The purpose of this District is to ensure the ongoing maintenance, operation and servicing of local landscaping and street lighting improvements established or installed in connection with development of properties within the District. The improvements may consist of all or a portion of the public landscaped areas, street lighting and appurtenant facilities within and adjacent to the District (Tract 2498). These improvements generally include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District. The improvements to be maintained and funded entirely or partially through the District assessments are generally described as:

- Streetscape landscaping including street trees located on the perimeter of the development and interior streets of Tract 2498 that are within the public rights-of-way or easements and dedicated to the City for maintenance;
- Open space areas and fuel modification areas within or adjacent to the District boundaries;
- Park areas, recreational equipment, trails and landscaped drainage facilities developed and constructed as part of developing properties within Tract 2498;
- Specifically not included as District improvements are those improvements located on private property, improvements and facilities that may be provided or maintained by an agency other than the City; improvements and facilities that may be provide by another assessment or tax levied by the City or any improvement provided and maintained by a Homeowner’s Association or similar entity.
- Public lighting facilities including street lighting, safety lighting and ornamental lighting installed as part of the residential development or landscaped improvement areas;
- Appurtenant facilities, equipment, materials and utilities related to the aforementioned improvements;
- Specifically not included as District improvements are those improvements located on private property, improvements and facilities that may be provided or maintained by an agency other than the City;



improvements and facilities that may be provide by another assessment or tax levied by the City or any improvement provided and maintained by a Homeowner’s Association or similar entity.

Detailed maps and descriptions of the location and extent of the specific improvements to be maintained by the District are on file in the Office of Public Works and by reference are made part of this Report. Those portions of the District improvements that may be identified as general benefit or will be funded in whole or in part by other revenue sources as part of the approved development agreements, will not be included as part of the District assessments. The net annual cost to provide and maintain the improvements determined to be of special benefit shall be allocated to each property in proportion to the special benefits received.

3.3.1 LANDSCAPE IMPROVEMENTS

The landscape improvements for the District may include, but are not limited to turf, ground cover, shrubs and plants, trees, irrigation and drainage systems, ornamental lighting, masonry walls or other fencing, hardscape improvements, monuments, and associated appurtenant facilities located within the landscape easements or public rights-of-way. Specifically the landscape improvement areas for this District are identified as:

- Approximately 43,560 square feet of streetscape (parkway embankment) landscaping within the public rights-of-way located on El Camino Real within the boundaries of Tract 2498;
- An estimated 150 trees, including trees within the landscaped area on El Camino Real, various trees within the open space area and the street trees within the street right-of-way on Ferrocarril Road;
- Approximately 175,550 square feet (4.03 acres) of landscaped area in and around the two (2) drainage basins within Tract 2498;
- Approximately fifty-one (51) acres of non-irrigated open space area;
- Approximately 48,000 square feet of paved and unpaved trails; and 2,600 linear feet of steel rail fencing along the trail system and landscaped areas.

3.3.2 PUBLIC LIGHTING IMPROVEMENTS

The approved development plans for Tract 2498 do not include any proposed streetlight facilities.

4. ESTIMATE OF COSTS

BUDGET	Total Budget	Costs Not Assessed	2024/25 Assessment
DIRECT COSTS			
Annual Costs			
Landscape Services	\$6,500	(\$895)	\$5,605
Landscape Supplies	600	0	600
Landscape Utilities	1,500	0	1,500
City Landscape Services	3,460	0	3,460
Other Maintenance Services	50	0	50
Total Annual Direct Costs	\$12,110	(\$895)	\$11,215
CAPITAL EXPENDITURES			
Special Projects	\$5,000	\$0	\$5,000
Total Annual Special Projects	\$5,000	\$0	\$5,000
ADMINISTRATION EXPENSES			
Annual Administration Expenses			
City Annual Administration	\$2,270	\$0	\$2,270
Engineer's Report & Services	5,000	0	5,000
Public Noticing	350	0	350
Total Administration	\$7,620	\$0	\$7,620
TOTAL DIRECT & ADMINISTRATION COSTS	\$24,730	(\$895)	\$23,835
CAPITAL RESERVE COLLECTIONS/(USES)			
Landscape Rehabilitation/Replacement	\$762	\$0	\$762
Trail and Pathway Rehabilitation/Replacement	1,000	(500)	500
Park and Open Space Rehabilitation/Replacement	707	0	707
Tree Rehabilitation/Replacement	(3,793)	0	(3,793)
Park Rehabilitation/Replacement	2,938	0	2,938
Total Annual Capital Reserve Collections/(Uses)	\$1,614	(\$500)	\$1,114
LEVY ADJUSTMENTS			
Interest Income - Improvement Fund	(\$2,896)	\$0	(\$2,896)
Interest Income - Operating Reserve Fund	(384)	0	(384)
Contribution from Other Sources	(1,395)	(1,395)	0
Reserve Collection/(Use)	(5,794)	0	(5,794)
Total Levy Adjustments	(\$10,469)	(\$1,395)	(\$9,074)
BALANCE TO LEVY	\$15,875	\$0	\$15,875
DISTRICT STATISTICS			
Total Parcels			89
Parcels Levied			86
Total EBU ⁽¹⁾			63.50
Levy per EBU			\$250.00
Maximum Levy per EBU			\$1,631.17
FUND BALANCE INFORMATION			
Beginning Operating Reserve Balance			\$13,871
Operational Reserve Interest			384
Surplus Transfer from Improvement Fund			8,308
Operational Reserve Collection/(Use)			(9,074)
Estimated Ending Operating Reserve Balance			\$ 13,489
Beginning Improvement Fund Balance			\$105,485
Improvement Fund Interest			2,896
Surplus Transfer to Operations Fund			(8,308)
Improvement Fund Collection/(Use)			\$1,614
Estimated Ending Improvement Fund Balance			\$101,687

⁽¹⁾ Levy per EBU rate does not include the County of San Luis Obispo fee of \$2.00 per parcel.



5. METHOD OF ASSESSMENT

5.1 General

The 1972 Act permits the establishment of assessment districts by agencies for the purpose of providing certain public improvements, which include the construction, maintenance, and servicing of public lights, landscaping and appurtenant facilities. The 1972 Act further requires that the cost of these improvements be levied according to benefit rather than assessed value:

“The net amount to be assessed upon lands within an assessment district may be apportioned by any formula or method which fairly distributes the net amount among all assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements.”

The method of apportionment described in this Report for allocation of special benefit assessments utilizes commonly accepted engineering practices and have been established pursuant to the 1972 Act and the provisions of Article XIID. The formulas used for calculating assessments reflects the composition of parcels within the District and the improvements and services provided, to fairly apportion the costs based on the special benefits to each parcel.

5.2 Benefit Analysis

Each of the proposed improvements, the associated costs and assessments have been carefully reviewed, identified and allocated based on special benefit pursuant to the provisions of the 1972 Act and Article XIID. The improvements provided by this District and for which properties will be assessed have been identified as necessary, required and/or desired for the orderly development of the properties within the District to their full potential, consistent with the development plans and applicable portions of the City General Plan. As such, these improvements would be necessary and required of individual property owners for the development of such properties and the ongoing operation, servicing and maintenance of these improvements would be the financial obligation of those properties. Therefore, the improvements and the annual costs of ensuring the maintenance and operation of the improvements are a distinct and special benefit to the properties within the District. Any improvement or portion thereof that is considered to be of general benefit shall be funded by other revenue sources and not included as part of the special benefit assessments allocated to properties within the District.

5.2.1 SPECIAL BENEFIT

The method of apportionment (method of assessment) established herein is based on the premise that each assessed parcel within the District receives special benefits from the improvements and the desirability and security of those properties is enhanced by the presence of public lighting and well-maintained landscaping in close proximity to those properties.

The special benefits associated with landscape improvements are specifically:

- Enhanced desirability of properties through association with the improvements.
- Improved aesthetic appeal of properties providing a positive representation of the area and properties.
- Enhanced adaptation of the urban environment within the natural environment from adequate green

space and landscaping.

- Environmental enhancement through improved erosion resistance, dust and debris control, and fire prevention.
- Increased sense of pride in ownership of property within the District resulting from well-maintained improvements associated with the properties.
- Enhanced quality of life through well-maintained green space and landscaped areas.
- Reduced criminal activity and property-related crimes (especially vandalism) against properties in the District through well-maintained surroundings and amenities including abatement of graffiti.
- Enhanced environmental quality of the parcels by moderating temperatures, providing oxygenation and attenuating noise.

The special benefits of street lighting and other public lighting facilities are the convenience, safety, and security of property, improvements, and goods. Specifically:

- Enhanced deterrence of crime and the aid to police protection.
- Increased nighttime safety on roads, streets and public areas.
- Improved ability of pedestrians and motorists to see.
- Improved ingress and egress to property.
- Reduced vandalism and other criminal act and damage to improvements or property.
- Improved traffic circulation and reduced nighttime accidents and personal property loss.

The preceding special benefits contribute to the esthetic value and desirability of each of the assessed parcels within the District and thereby provide a special enhancement of the properties. Furthermore, it has been determined that the lack of funding to properly service and maintain the District improvements would have a negative impact on the properties within the District.

5.2.2 GENERAL BENEFIT

Upon reviewing each of the District improvements, the proximity of those improvements to both properties within the District and those outside the District as well as the reasons for installing, constructing and maintaining such improvements, it is evident that the properties within the District receive special benefit from those improvements. While the District improvements clearly include public areas, easements, rights-of-way and other amenities available or visible to the public at large, the landscaped areas, trails, detention basin as well as the need to increase maintenance activities within the open space areas resulted solely from the development of properties within the District and would otherwise not have been required nor necessarily desired by any properties or developments outside the District and any public access or use of the improvements by others is incidental. Therefore, it has been determined that these improvements and the ongoing maintenance, servicing and operation of those improvements provide no measurable general benefit to properties outside the District or to the public at large. However, while this development has facilitated a need for increased maintenance of the open space area associated with Tract 2498, it is also recognized that land conservation and ensuring adequate open space areas within the City does have some indirect, but not quantifiable, benefit to the community at large. Therefore, while the entire cost to maintain the open space area as well as the Horse Arena facility have been incorporated into the District budget, the annual cost to maintain the arena and a portion of the

open space area are not included in the proposed special benefit assessments. Should the City require maintenance of these areas, the associated costs will be funded by other revenue sources available to the City.

5.3 Assessment Methodology

The method of apportionment for the District calculates the receipt of special benefit from the respective improvements based on the actual or proposed land use of the parcels within the District. The special benefit received by each lot or parcel is equated to the overall land use of parcels within the District based on the parcel's actual land use or proposed development.

The costs associated with the improvements shall be fairly distributed among the parcels based upon the special benefit received by each parcel. Additionally, in compliance with the Article XIID Section 4, each parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred to that parcel. The benefit formula used to determine the assessment obligation is therefore based upon both the improvements that benefit the parcels within the District as well as the proposed land use of each property as compared to other parcels that benefit from those specific improvements.

To identify and determine the special benefit to be received by each parcel and their proportionate share of the improvement costs it is necessary to consider the entire scope of the planned improvements as well as individual property development within the District. Upon review of the proposed improvements it has been determined that each of the residential parcels within the District receives special benefits from the improvements to be funded by annual assessments and based on the planned property development a single zone of benefit is appropriate for the allocation of the assessments and proportional benefit.

5.3.1 EQUIVALENT BENEFIT UNITS:

To assess benefits equitably it is necessary to relate each property's proportional special benefits to the special benefits of the other properties within the District. The method of apportionment established for most districts formed under the 1972 Act utilizes a weighted method of apportionment known as an Equivalent Benefit Unit methodology that uses the single-family home site as the basic unit of assessment. A single-family home site equals one Equivalent Benefit Unit (EBU) and the other land uses are converted to a weighted EBU based on an assessment formula that equates the property's specific development status, type of development (land use), and size of the property, as compared to a single-family home site.

Although the Equivalent Benefit Unit method of apportioning special benefit is most commonly used and applied to districts that have a wide range of land use classifications (residential and non-residential use), this District is comprised of only residential properties and the following apportionment analysis of special benefit addresses only residential land uses. Not all land use types described in the following are necessarily applicable to the development of properties within this District, but are presented for comparison purposes to support the proportional special benefit applied to those land use types within the District.

5.3.2 EBU APPLICATION BY LAND USE:

- (1) **Single-family Residential** — This land use is defined as a fully subdivided residential home site with or without a structure. This land use is assessed 1.00 EBU per lot or parcel. This is the base value



that the other properties are compared and weighted against regarding special benefit.

- (2) Multi-family Residential** — This land use is defined as a fully subdivided residential parcel that has more than one residential unit developed on the property. (This land use typically includes apartments, duplexes, triplex etc., but does not generally include condominiums, town-homes or mobile home parks). Based on average population densities and size of the structure as compared to a typical single-family residential unit, multi-family residential parcels shall be proportionately assessed for the parcel’s total number of residential units utilizing a sliding benefit scale. Although multi-family properties typically receive similar benefits to that of a single-family residential, it would not be reasonable to conclude that on a per unit basis, the benefits are equal. Studies have consistently shown that the average multi-family unit impacts infrastructure approximately 75% as much as a single-family residence (Sample Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition). These various studies indicate that most public improvements and infrastructure are utilized and impacted at reduced levels by multi-family residential units and a similar reduction in proportional benefit is appropriate. Furthermore, it is also reasonable to conclude that as the density (number of units) increases the proportional benefit per unit tends to decline because the unit size and people per unit usually decreases. Based on these considerations and the improvements provided by this District, an appropriate allocation of special benefit for multi-family residential properties as compared to a single-family residential is best represented by the following special benefit assignment: 0.75 EBU per unit for the first 50 units; 0.50 EBU per unit for units 51 through 100; and 0.25 EBU per unit for remaining units.
- (3) Condominium/Town-home Units** — Condominiums and town-homes tend to share attributes of both single-family residential and multi-family residential properties and for this reason are identified as a separate land use classification. Like most single-family residential properties, these properties are not usually considered rental property and generally, the County assigns each unit a separate APN or assessment number. However, condominiums and town-homes often have similarities to multi-family residential properties in that they are generally zoned medium to high density and in some cases may involve multiple units on a single APN. In consideration of these factors, it has been determined that an appropriate allocation of special benefit for condominiums, town-homes and similar residential properties is best represented by an assignment of 0.75 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to an APN. (There is no adjustment for parcels with more than five units).
- (4) Modified Housing/Senior Housing Units** — Modified Housing or Senior Housing is generally defined as residential units that would typically be classified as Condominiums or Town-homes, but have specific deed restrictions that may limit the size or use of all units within the development. This classification is not applicable to individual single-family residential parcels unless all single-family residential parcels within that particular development or subdivision have the same restrictions. (For example: One or more single-family units within a subdivision that are deed restricted as “Affordable Housing” or “Senior Housing” does not qualify for this land use classification, unless all the units within that development have the same or similar deed restrictions.) Since this classification generally involves Condominium or Town-home type properties, that are generally

assigned 0.75 EBU, it has been determined that an appropriate allocation of special benefit for modified housing units or senior housing units is best represented by an assignment of 0.625 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to a single APN.

- (5) Planned-Residential Development** — This land use is defined as any property for which a tentative or final tract map has been filed and approved (a specific number of residential lots and units has been identified) and the property is expected to be subdivided within the fiscal year or is part of the overall improvement and development plan for the District. This land use classification often times involves more than a single parcel (e.g. the approved tract map encompasses more than a single APN). Each parcel that is part of the approved tract map shall be assessed proportionately for the proposed or estimated residential type and units to be developed on that parcel as part of the approved tract map. Accordingly, each parcel is assigned an appropriate number of benefit units that reflects the development of that property at build-out. (The EBU assigned to each parcel shall represent the combination of single-family, condominium, multi-family units to be developed).
- (6) Vacant Residential** — This land use is defined as property currently zoned for residential development, but a tentative or final tract map for the property has not yet been approved. Based upon the opinions of professional appraisers who appraise market property values for real estate in California, the land value portion of a property typically ranges from 20 to 30 percent of the total value of a developed residential property (the average is about 25 percent). Although the assessed value of an individual property is not a direct reflection of the property's special benefit, this general correlation between land value and structure value does provide a reasonable basis for apportioning special benefit for vacant residential properties. Utilizing this twenty-five percent (25%) apportionment and the number of single-family residential units typically developed per acre of land (an average of 4 residential units per acre) an Equivalent Benefit Unit of 1.00 EBU per acre (4 units per acre x 25%) is derived and presents an appropriate apportionment of special benefit for vacant residential properties. Recognizing that the full and timely utilization of vacant property is reduced as the size of the property increases, it has been determined that the maximum EBU assigned to a vacant residential parcel shall not exceed 25.00 EBU (parcels in excess of 25 acres are assigned 25.00 EBU). Parcels less than one acre, shall be assigned a minimum of 1.00 EBU (similar to a vacant lot within a residential tract).
- (7) Exempt Parcels** — This land use identifies properties that are not assessed and are assigned 0.00 EBU. This land use classification may include but is not limited to:
- Lots or parcels identified as public streets and other roadways (typically not assigned an APN by the County);
 - Dedicated public easements including open space areas, utility rights-of-way, greenbelts, parkways, parks or other publicly owned properties that are part of the District improvements or may provide other benefits to private properties within the District;
 - Private properties that cannot be developed independently from an adjacent property, such as common areas, sliver parcels or bifurcated lots or properties with very restrictive development use;



These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment, but shall be reviewed annually by the assessment engineer to confirm the parcels’ current development status. Government owned properties or public properties are not necessarily exempt properties and shall be subject to special benefit assessment unless it qualifies for an exempt status.

(8) Special Cases — In many districts where multiple land use classifications are involved, there are usually one or more properties for which the standard land use classifications do not accurately identify the special benefits received from the improvements. For example, a parcel may be identified as a Vacant Residential property, however only a small percentage of the parcel’s total acreage can actually be developed. In this case, an appropriate calculation would be based on the net acreage that can be utilized rather than the gross acreage of the parcel.

The following table provides a summary of land use classifications and the Equivalent Benefit Unit calculations previously outlined.

Property Type	Equivalent Benefit Units	Multiplier
Single-family Residential	1.00	Per Unit/Lot/Parcel
Multi-family Residential	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Condominium/Townhome Units	0.75	Per Unit
Modified Housing/Senior Housing Units	0.625	Per Unit
Planned Residential Development	1.00	Per Planned SF Residential Lot
	0.75	Per Planned Condominium
	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Vacant Residential Land	1.00	Per Acre
Exempt Parcels	0.00	Per Parcel

The following formula is used to calculate each parcel’s EBU (proportional benefit).

$$\text{Parcel Type EBU} \times \text{Acres or Units} = \text{Parcel EBU}$$

The total number of Equivalent Benefit Units (EBU’s) is the sum of the individual EBU's applied to parcels that receive special benefit from the improvements. An assessment amount per EBU (Assessment Rate) for the improvements is established by taking the total cost of the improvements and dividing that amount by the total number of EBU’s of the parcels benefiting from the improvements. This Rate is then applied back to each parcel’s individual EBU to determine the parcel’s proportionate benefit and assessment obligation for the improvements.

$$\text{Total Balance to Levy} / \text{Total EBU} = \text{Levy per EBU}$$

$$\text{Levy per EBU} \times \text{Parcel EBU} = \text{Parcel Levy Amount}$$



5.4 Assessment Range Formula

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218 (California Constitution Articles XIII C and XIII D), legislative changes in the Brown Act defined a "new or increased assessment" to exclude certain conditions. These conditions included "any assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed." This definition and conditions were later confirmed through Senate Bill 919 (Proposition 218 implementing legislation).

The purpose of establishing an Assessment Range Formula is to provide for reasonable increases and inflationary adjustment to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District formation, the notice and assessment ballots presented to the property owners for approval included a maximum assessment amount for Fiscal Year 2005/2006 (initial maximum assessment), identification of the corresponding maximum assessment rate and a summary of the Assessment Range Formula described herein.

The Assessment Range Formula for this District shall be applied to future assessments and is generally defined:

- If the proposed annual assessment (levy per EBU) for the upcoming fiscal year is less than or equal to the adjusted Maximum Assessment Rate, then the proposed annual assessment is not considered an increased assessment.
- The Maximum Assessment Rate is equal to the (Initial) Maximum Assessment Rate established for Fiscal Year 2005/2006 adjusted annually by the greater of, three percent (3%) or the annual percentage change in the Consumer Price Index (CPI) of "All Urban Consumers" for the San Francisco-Oakland-Hayward Area from February to February. The Maximum Assessment rate was increased by 3.000% for Fiscal Year 2024/25.

Beginning with Fiscal Year 2006/2007 and each fiscal year thereafter, the Maximum Assessment Rate is recalculated and a new Maximum Assessment Rate is established for the fiscal year utilizing the Assessment Range Formula described above. The Maximum Assessment Rate has been calculated independent of the District's annual budget and proposed assessment. The annual percentage change in CPI is based on available data provided by the U.S. Department of Labor; Bureau of Labor Statistics at the time the annual Report is prepared. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the City Council for determining fluctuations in the cost of living. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the change the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

Any proposed annual assessment (rate per EBU) less than or equal to the calculated (adjusted) Maximum Assessment Rate is not considered an increased assessment, even if the proposed assessment is significantly greater than the assessment applied in the prior fiscal year. Likewise, modifications to the method of apportionment that increase the proportional special benefit assigned to a particular land use classification would be considered an increased assessment. Conversely, reductions in the proportional

special benefit assigned to a land use classifications are permitted. Changes in land use or size of an individual property resulting in an assessment increase, is not considered an increased assessment.

To impose a new or increased assessment other than the annual inflationary adjustment provided by the preceding Assessment Range Formula, the City must comply with the provisions of Article XIID Section 4c, that requires a public hearing and certain protest procedures including mailed notice of the public hearing and property owner protest balloting. Property owners through the balloting process must approve a proposed new or increased assessment before such an assessment may be imposed.

6. ASSESSMENT DIAGRAM

The parcels within the Landscaping and Lighting District No. 03 De Anza Estates consist of the lots, parcels and subdivisions of land located in the planned residential development known as De Anza Estates, Tract 2498. The District covers approximately seventy-six acres (75.84 acres) in the northern portion of the City of Atascadero.

The following map is based on the District Diagram, the San Luis Obispo County Assessor's Maps and the San Luis Obispo County Assessor's information and identifies the parcels of land within the proposed District, as the same existed at the time the District was formed. The combination of the District Diagram on file with the City Clerk and the Assessment Roll contained in this Report constitute the District Assessment Diagram.



7. ASSESSMENT ROLL

Parcel identification for each lot or parcel within the District is based on the Assessment Diagram presented herein and is based on available parcel maps and property data from the San Luis Obispo County Assessor's Office at the time the Engineer's Report was prepared. A listing of the lots and parcels to be assessed within this District along with the assessment amounts is provided herein.

Non-assessable lots or parcels may include, but are not limited to public streets and other roadways (typically not assigned an APN by the County); dedicated public easements, open space areas, rights-of-way, common areas; landlocked parcels, small parcels vacated by the County, bifurcated lots, and any other property that cannot be developed or has little or no value. These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment.

If any parcel submitted for collection is identified by the County Auditor/Controller to be an invalid parcel number for the fiscal year, a corrected parcel number and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel or parcels shall be based on the method of apportionment and assessment rate described in this Report as approved by the City Council. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the assessment amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment amount.

City of Atascadero
Landscaping & Lighting Maint Dist No. 3
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-044-002	755 N FERROCARRIL RD	Single Family Residential	1.000	\$1,631.18	\$250.00
049-044-003	765 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-004	805 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-005	905 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-006	955 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-007	1025 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-008	1055 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-009	1155 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-010	1255 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-011	1305 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-012	1355 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-013	1200 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-014	1100 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-015	1000 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-016	950 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-017	860 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-018	850 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-019	870 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-020	880 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-044-021	705 DE ANZA CT	Single Family Residential	1.000	1,631.18	250.00
049-044-022	725 DE ANZA CT	Single Family Residential	1.000	1,631.18	250.00
049-044-023	750 DE ANZA CT	Single Family Residential	1.000	1,631.18	250.00
049-044-024	740 DE ANZA CT	Single Family Residential	1.000	1,631.18	250.00
049-044-025	720 DE ANZA CT	Single Family Residential	1.000	1,631.18	250.00
049-044-026	700 DE ANZA CT	Single Family Residential	1.000	1,631.18	250.00
049-044-033	655 N FERROCARRIL RD	Single Family Residential	1.000	1,631.18	250.00
049-046-002	503 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-003	505 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-004	507 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-005	509 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-006	511 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-007	513 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-008	515 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-009	517 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-010	519 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-011	521 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-012	524 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-013	526 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-014	528 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-015	530 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-016	532 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-017	534 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 3
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-046-018	536 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-019	538 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-020	540 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-021	542 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-022	572 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-023	574 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-024	576 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-025	578 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-026	580 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-027	582 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-028	584 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-029	586 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-030	588 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-031	590 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-032	592 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-033	551 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-034	553 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-035	555 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-036	557 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-037	559 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-038	561 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-039	563 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-040	565 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-041	567 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-042	595 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-043	597 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-044	599 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-045	603 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-046	605 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-047	601 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-048	609 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-049	607 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-050	610 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-051	612 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-052	614 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-053	616 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-054	618 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-055	620 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-056	622 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-057	624 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-058	626 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-059	628 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 3
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
049-046-060	630 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
049-046-061	501 N FERROCARRIL RD	Senior Housing Units	0.625	1,019.49	156.24
86 Accounts			63.500		\$15,874.40
86 Total Accounts			63.500		\$15,874.40

Slight variances may occur due to rounding



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A5

Department: Administrative Services
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER

FROM: JERI RANGEL, DIRECTOR OF ADMINISTRATIVE SERVICES

PREPARED BY: DAWN PATTERSON, ACCOUNTING SPECIALIST

SUBJECT: Las Lomas (Woodridge) Assessment Districts

RECOMMENDATION:

Council:

1. Adopt Draft Resolution A, initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025.
2. Adopt Draft Resolution B, accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 02 (Las Lomas [Woodridge]).
3. Adopt Draft Resolution C, declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 02 (Las Lomas [Woodridge]) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters.
4. Adopt Draft Resolution D, initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code.
5. Adopt Draft Resolution E, for preliminary approval of the Annual Engineer's Levy Report for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025.
6. Adopt Draft Resolution F, declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Las Lomas [Woodridge]) for fiscal year 2024/2025.

REPORT IN BRIEF:

Adoption of the annual Draft Resolutions A-F declaring the City's intention to levy and collect assessments for fiscal year 2024/2025 for the Las Lomas Street and Storm Drain Maintenance and the Landscaping and Lighting Maintenance Districts.

DISCUSSION:

The City Council formed and began assessing Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) in 2005. This district was formed to provide funding for future routine maintenance of the streets, storm drains and sidewalks in the Woodridge subdivision.

The City Council also formed and began assessing Atascadero Landscape and Lighting Maintenance District No. 02 (Woodridge) in 2005. This district was formed to provide for funding and maintenance of street trees, open space, park area, medians, walkways, paths and other landscape and lighting improvements within the Woodridge subdivision.

The Woodridge subdivision is now known as Las Lomas. The Assessment Districts were formed and named when the area was known as the Woodridge development. All references to Woodridge are now understood to mean the development known as Las Lomas.

NBS, an independent financial consultant, was hired to prepare the engineer's report for the two districts. The engineer's report and the levies must be approved by Council annually. This is done in a two-step process. Tonight, there are three resolutions for each district (a total of 6 resolutions in all) that must be passed in order to continue the assessments within the districts. The resolutions passed tonight will also establish the date and time for the public hearing. The public hearing is tentatively scheduled for June 25, 2024, at 6:00 p.m. or soon thereafter, at which time the final resolutions will be presented to the Council for passage.

The proposed assessments for fiscal year 2024/2025 are less than the Maximum Assessment Rate. In accordance with the formula voters of the district adopted in 2005, the City may increase the Maximum Assessment Rate for inflation by the greater of the Consumer Price Index (CPI) or 3.0%. The Maximum Assessment Rate was increased by 3% (CPI) this year for both districts.

An Assessment Information Notice was mailed to all property owners on April 22, 2024. The notice provided the date of the upcoming June 25, 2024, Public Hearing, information on how to participate in the meeting, staff contact information, and the proposed and current levies for both districts.

The Landscaping and Lighting District levy is about 14% of the allowable maximum annual assessment and the Street and Storm Drain District is about 47% of the allowable maximum annual assessment.

The Landscape and Lighting District is experiencing increased costs due to the aging landscape and increases in costs of labor and utilities. City staff works to maximize efficiencies and minimize levy increases. City staff expect modest levy increases in future years in order to continue providing the existing service levels.

At the direction of the homeowners in attendance at meetings held December 14, 2017, and April 11, 2018, the City staff set the levy for the Street and Storm Drain (SSD) Benefit Assessment

District at an amount that will cover short-term maintenance but will not be sufficient for long-term maintenance and repair.

This Assessment District levy amount is sufficient only for the annual operating costs and a periodic surface treatment (slurry seal) of the roads. As discussed at the aforementioned meetings and the Public Hearings, Neighborhood meetings, and Annual Notices since, these funds will only be enough to cover road maintenance costs through fiscal year 2032/33. Beyond that time, the roads will require more in-depth road rehabilitation projects that will require significant funding. The estimated cost of that work is just under \$1,000,000 using current dollars and is the financial obligation of the residents of the Benefit Assessment District. As 2034 approaches, a bond issue or other financing mechanism will need to be approved and paid for by the residents to fund the longer-term improvements needed to maintain the District. This information was included in the Assessment Information Notice that was mailed to the property owners.

District	Amount Per EBU Assessment Fiscal Year 2023-24	Amount Per EBU Proposed Assessment Fiscal Year 2024-25
Atascadero Street and Storm Drain Maintenance District No. 02 Las Lomas	\$ 428.00	\$ 438.00
Atascadero Landscaping and Lighting Maintenance District No. 02 Las Lomas	\$ 320.00	\$ 328.00

FISCAL IMPACT:

Annual assessments for 2024/2025 will total \$101,506 for road/drainage system maintenance and \$76,014 for landscape and lighting maintenance. These amounts will be assessed to the owners of parcels in Las Lomas (Woodridge). The City General Fund will contribute \$2,600 for the fiscal year 2024/2025 for 25% of the maintenance costs of the trails and open space.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. **Draft Resolution A** - initiating proceedings for the levy and collection of annual assessments for Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) for fiscal year 2024/2025
2. **Draft Resolution B** - accepting and preliminarily approving the Engineer's Annual Levy Report regarding the Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge)
3. **Draft Resolution C** - declaring the City's intention to levy and collect annual assessments within Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) in fiscal year 2024/2025, and to appoint a time and place for the public hearing on these matters
4. **Engineer's Annual Levy Report** - for the levy and collection of fiscal year 2024/2025 assessments for Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge)
5. **Draft Resolution D** - initiating proceedings for annual levy of assessments for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Woodridge) for fiscal year 2024/2025 pursuant to the provisions of Part 2 of Division 15 of the California Streets and Highways Code
6. **Draft Resolution E** - preliminary approval of the Annual Engineer's Levy Report for Atascadero Landscaping and Lighting Maintenance District No. 02 (Woodridge) for fiscal year 2024/2025
7. **Draft Resolution F** - declaring the City's intention to levy and collect assessments for the Atascadero Landscaping and Lighting Maintenance District No. 02 (Woodridge) for fiscal year 2024/2025
8. **Engineer's Annual Levy Report** - for the levy and collection of fiscal year 2024/2025 assessments for Atascadero Landscaping and Lighting District No. 02 (Woodridge)

DRAFT RESOLUTION A

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, INITIATING PROCEEDINGS FOR THE LEVY AND COLLECTION OF ANNUAL ASSESSMENTS FOR ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 02 (WOODRIDGE) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”) formed an assessment district to be designated as Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) (hereafter referred to as the “District”), for the purpose of funding the ongoing operation, maintenance and servicing of public streets, sidewalks, storm drain and flood control facilities installed in conjunction with the development of properties known as Tract 2525-1; and to levy and collect annual assessments related thereto. The 1982 Act provides for the formation of such an assessment district pursuant to *Article 3 Section 54710*, and provides for the levy and collection of assessments by the County on behalf of the City pursuant to *Article 4 Section 54718*; and

WHEREAS, the City Council has retained NBS as the Engineer of Work, for the purpose of assisting with the administration of the District, the establishment of annual assessments, and to prepare and file an Engineer’s Report with the City Clerk in accordance with the 1982 Act; and in accordance with the requirements of the *California Constitution, Articles XIII C and XIII D*.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The City Council hereby orders the Engineer to prepare and file an Engineer’s Annual Levy Report concerning the levy of assessments for properties within the District as specified by *Article 4 Section 54716* of the 1982 Act.

SECTION 2. The District improvements include the ongoing operation, administration, maintenance and servicing of the public streets, drainage and flood control systems and appurtenant facilities authorized pursuant to the 1982 Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to pavement, curbs, sidewalks, hardscape, bridges, fencing, signage, drains, pipes, inlets, outlets, catch basins, drainage basins, manholes, and associated appurtenant facilities located within the public street rights-of-way and other public easements within the District.

SECTION 3. The territory within Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) consists of lots, parcels and subdivisions of land located in the development known as Tract 2525-1.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ____th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION B

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, ACCEPTING AND PRELIMINARILY APPROVING THE ENGINEER'S ANNUAL LEVY REPORT REGARDING THE ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 02 (WOODRIDGE)

The City Council of the City of Atascadero (hereafter referred to as "City Council") hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council has, by previous Resolution, ordered the preparation of an Engineer's Annual Levy Report (hereafter referred to as the "Report") regarding the assessment district to be designated as the Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) (hereafter referred to as the "District"), and the levy and collection of assessments related thereto, pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the "1982 Act"); and

WHEREAS, there has now been presented to this City Council the Report as specified by *Article 4 Section 54716* of said 1982 Act; and

WHEREAS, the City Council has carefully examined and reviewed the Report as presented, and is preliminarily satisfied with the District and the budget items and documents as set forth therein, and is satisfied that the proposed assessments have been spread in accordance with the special benefits received from the improvements, operation, administration, maintenance and services to be performed within the District, as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The preceding recitals are true and correct.

SECTION 2. That the Report as presented, consists of the following:

- a. A Description of Improvements.
- b. A Boundary Diagram of the District.
- c. The Method of Apportionment that details the method of calculating each parcel's proportional special benefits and annual assessment.
- d. The proposed Budget (Costs and Expenses) and the duration and collection of assessments.
- e. The District Roll containing the Levy for each Assessor Parcel Number within the District for fiscal year 2024/2025.

SECTION 3. The Report is hereby approved on a preliminary basis and ordered to be filed in the Office of the City Clerk as a permanent record and to remain open to public inspection.

SECTION 4. The Maximum Assessment described in the Report is hereby approved on a preliminary basis.

SECTION 5. The City Clerk shall certify to the passage and adoption of this Resolution, and the Minutes of this meeting shall so reflect the presentation of the Report.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION C

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AND COLLECT ANNUAL ASSESSMENTS WITHIN ATASCADERO STREET AND STORM DRAIN MAINTENANCE DISTRICT NO. 02 (WOODRIDGE) IN FISCAL YEAR 2024/2025, AND TO APPOINT A TIME AND PLACE FOR THE PUBLIC HEARING ON THESE MATTERS

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council pursuant to the provisions of the *Benefit Assessment Act of 1982, Chapter 6.4 of the California Government Code, beginning with Section 54703* (hereafter referred to as the “1982 Act”) did by previous Resolution approve the levy and collection of annual assessments to pay for the operation, maintenance and servicing of public streets, drainage and flood control systems and appurtenant facilities related thereto for the assessment district designated as Atascadero Street and Storm Drain Maintenance District No. 02 (Woodridge) (hereafter referred to as the “District”); and

WHEREAS, the Engineer selected by the City Council has prepared and filed with the City Clerk a Report in connection with the proposed District, and the levy of assessments for Fiscal Year 2024/2025 (July 1, 2024 and ending June 30, 2025) in accordance with *Chapter 1, Article 4* of the 1982 Act and in accordance with the requirements of the *California Constitution, Articles XIII C and XIII D*, and the City Council did by previous Resolution preliminarily approve such Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The City Council hereby declares its intention to seek the annual levy of the District pursuant to the 1982 Act, over and including the land within the District boundary, and to levy and collect special benefit assessments on parcels of land within the District to pay for the costs and expenses associated with the operation, maintenance, repair and servicing of public streets, drainage and flood control systems and appurtenant facilities related thereto.

SECTION 2. The District improvements include the ongoing operation, administration, maintenance and servicing of the public streets, drainage and flood control systems and appurtenant facilities authorized pursuant to the 1982 Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to pavement, curbs, sidewalks, hardscape, bridges, fencing, signage, drains, pipes, inlets, outlets, catch basins, drainage basins, manholes, and associated appurtenant facilities located within the public street right-of-ways and other public easements within the District. The Engineer’s Report, as ordered by previous Resolution, provides a full and complete description of the improvements within the District.

SECTION 3. The proposed territory within Street and Storm Drain Maintenance District No. 02 (Woodridge) consists of lots, parcels and subdivisions of land located in the development known as Tract 2525-1.

SECTION 4. The proposed assessments for the District are outlined in the Engineer’s Report. The Report details the proposed assessments necessary to provide for the annual operation, administration, services and maintenance of the improvements described in Section 2 of this Resolution.

SECTION 5. Notice is hereby given that a Public Hearing on these matters will be held by the City Council on Tuesday, June 25, 2024, at 6:00 p.m. or as soon thereafter as feasible in the regular meeting chambers of the City Council located at 6500 Palma Avenue, Atascadero, California. At the Public Hearing, all interested persons shall be given an opportunity to hear and be heard on the proposed assessment to be levied for fiscal year 2024/2025 as contained in the Engineer’s Report on file in the City Clerk’s Office.

SECTION 6. The City Clerk shall give notice of the filing of the report and the time and place of the Public Hearing by publishing in a local newspaper one time at least 10 days prior to the Public Hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of ____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

CITY OF ATASCADERO

Fiscal Year 2024/25 Engineer's Report For:

Street and Storm Drain Maintenance District No. 02 Las Lomas (Woodridge)

May 2024

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

CITY OF ATASCADERO
Street and Storm Drain Maintenance District No. 02
Las Lomas (Woodridge)

6500 Palma Avenue
Atascadero, CA 93422
Phone – (805) 461-5000
Fax – (805) 461-7612

CITY COUNCIL

Heather Moreno, Mayor

Susan Funk, Mayor Pro Tem

Charles Bourbeau, Council Member

Mark Dariz, Council Member

Heather Newsom, Council Member

AGENCY STAFF

Jim Lewis, City Manager

Jeri Rangel, Administrative Services Director

Cindy Chavez, Deputy Director of Administrative Services

NBS

Danielle Robison, Administrator

Adina McCargo, Project Manager

Tim Seufert, Client Services Director

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1. ENGINEER’S LETTER

WHEREAS, on March 24, 2005 by Resolution No. 2005-048, the City Council of the City of Atascadero (the "City"), State of California, in accordance with and pursuant to the provisions of the Benefit Assessment Act of 1982, being Chapter 6.4 of the California Government Code, commencing with Section 54703 (hereafter referred to as the "1982 Act"), and in compliance with the substantive and procedural requirements of the California State Constitution Article XIID (hereafter referred to as the "California Constitution"), established the City of Atascadero Street and Storm Drain Maintenance District No. 02 Las Lomas (Woodridge) (the "District"); and

WHEREAS, on May 28, 2024 the City Council, adopted its Resolution Initiating Proceedings for the Annual Levy of Assessments and Ordering the Preparation of an Engineer’s Report for the District; and

WHEREAS, the Resolution Initiating Proceedings directed NBS to prepare and file a report describing the general nature, location, and extent of the improvements to be maintained; an estimate of the costs of the maintenance, operations, and servicing of the improvements for the District for the referenced fiscal year; a diagram for the District, showing the area and properties to be assessed; and an assessment of the estimated costs of the administration, maintenance, operations, and servicing the improvements, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

NOW THEREFORE, the assessments as detailed in this Engineer’s Report and as summarized in the table below are made to cover the portion of the estimated costs of maintenance, operation and servicing of the improvements to be paid by the assessable real property within the District in proportion to the special benefit received. The following table summarizes the proposed assessment for Fiscal Year 2024/25:

FY 2024/25 Summary of Assessment

Description	Amount
Estimated Annual Costs	\$22,830
Capital Reserve Collection/(Uses)	114,270
Levy Adjustments	(35,590)
Balance to Levy	\$101,510
Fiscal Year 2024/25 Maximum Rate	\$927.10
Fiscal Year 2024/25 Proposed Applied Rate	\$438.00

I, the undersigned, respectfully submit the enclosed Engineer’s Report and, to the best of my knowledge, information, and belief, the Engineer’s Report, Assessments, and the Assessment Diagram herein have been prepared, computed, and levied in accordance with the assessment methodology adopted, approved, and ordered by the City Council of the City of Atascadero and the 1982 Act.

City Engineer



2. EXECUTIVE SUMMARY

Pursuant to the provisions of the *Benefit Assessment Act of 1982, being Chapter 6.4 of the California Government Code, commencing with Section 54703* (hereafter referred to as the “1982 Act”), and in compliance with the substantive and procedural requirements of the *California State Constitution Article XIID* (hereafter referred to as the “California Constitution”), the City Council of the City of Atascadero, County of San Luis Obispo, State of California (hereafter referred to as “City”), proposed to form and levy special benefit assessments for the district designated as:

Street and Storm Drain Maintenance District No. 02 Las Lomas (Woodridge)

(hereafter referred to as the “District”), which includes the lots and parcels of land within the residential subdivision known as Las Lomas (Woodridge), Tract 2525-1 within the City limits of the City. This Engineer’s Report (hereafter referred to as the “Report”) has been prepared in connection with the levy and collection of annual assessments related thereto for Fiscal Year 2024/25.

The City Council formed the District, and provided for the levy and collection of annual assessments on the County tax rolls to provide ongoing funding for the costs and expenses required to service and maintain the street and storm drain improvements and facilities associated with and resulting from the development of properties within the District. The improvements to be provided by the District and the assessments described herein are made pursuant to the 1982 Act and the substantive and procedural provisions of the California Constitution.

This Report describes the District, the improvements, and the proposed assessments to be levied against properties in connection with the special benefits the properties will receive from the maintenance and servicing of the District improvements and facilities. The annual assessments described herein will provide a funding source for the continued operation and maintenance of streets, storm drain system and appurtenant facilities installed in connection with the development of properties within the District.

The improvements and assessments described in this Report are based on the development of properties within the District and represent an estimate of the direct expenditures, incidental expenses, and fund balances that will be necessary to maintain and service the streets and storm drain system that provides special benefits to properties within the District. The structure of the District (organization), the improvements, the method of apportionment, and assessments described herein are based on current development plans and specifications for Tract 2525-1; and by reference these plans and specifications are made part of this Report.

The word “parcel,” for the purposes of this Report, refers to an individual property assigned its own Assessor’s Parcel Number (APN) by the San Luis Obispo County Assessor’s Office. The San Luis Obispo County Auditor/Controller uses Assessor’s Parcel Numbers and specific Fund Numbers to identify properties to be assessed on the tax roll for the special benefit assessments.

As part of this District’s formation, the City conducted a Property Owner Protest Ballot proceeding for the proposed levy of a new assessment pursuant to the provisions of the *California Constitution, Article XIID Section 4*. In conjunction with this ballot proceeding, the City Council conducted a noticed public hearing to consider public testimonies, comments and written protests regarding the formation of the District and



levy of assessments. Upon conclusion of the public hearing, property owner protest ballots received were opened and tabulated to determine whether majority protest existed (ballots were weighted based on assessment amounts), and by resolution the City Council confirmed the results of the ballot tabulation. The tabulation of the ballots indicated that majority protest did not exist for the proposed assessments and the assessment range formula presented and described herein; therefore, the City Council approved the Report (as submitted or amended), ordered the formation of the District, and approved the levy and collection of assessments. The assessments for Fiscal Year 2005/2006 were submitted to the San Luis Obispo County Auditor/Controller for inclusion on the property tax roll for each parcel.

Each subsequent fiscal year, a Report shall be prepared and presented to the City Council describing any changes to the improvements, proposed services, the annual budget or assessments for that fiscal year and the City Council may hold a noticed public hearing regarding these matters prior to approving and ordering the proposed levy of assessments. If the proposed assessments for the District exceed the maximum assessment described herein (as approved by the property owners), the new or increased assessment must be confirmed through another property owner protest ballot proceeding before such an assessment may be imposed. It should be noted that an increased assessment to an individual property resulting from changes in development or land use does not constitute an increased assessment.

3. PLANS AND SPECIFICATIONS

3.1 Benefiting Properties within the District

The territory within the District consists of the lots, parcels and subdivisions of land within the residential subdivision known as the Las Lomas (Woodridge), Tract 2525-1, which encompasses an area of land totaling approximately one hundred and eleven acres (111.20 acres).

This residential subdivision includes one hundred forty-three (143) single-family residential units; thirty-five (35) condominium/senior housing units; and a single, one hundred (100) unit multi-family residential project at build-out. Due to parcel splits the multi-family residential project is spread over three parcels. The planned subdivision is situated in the southeast portion of the City of Atascadero and is generally located:

- South and east of Halcon Road;
- East of Highway 101 and El Camino Real
- South and west of the Southern Pacific Railroad Tracks; and
- North of Salinas Road and Santa Cruz Road

3.2 Funding Authorized by the 1982 Act

As generally defined by the Benefit Assessment Act of 1982 and applicable to this District, the City may impose a benefit assessment to finance the maintenance and operation costs of the following services:

- Drainage and Flood Control;
- Streets and Roads.

In addition to imposing a benefit assessment for the annual maintenance and operation of the District improvements, the City may also authorize an assessment or utilize existing assessment revenues to finance the installation, construction or replacement of drainage and flood control facilities as well as the street and road improvements (with some limitations). While such activities are permitted under the 1982 Act, the budget and assessments for this District only provide for normal maintenance and operation of the improvements. Since most major rehabilitation/construction projects result from unforeseen damages, the extent and cost of such projects are not easily predicted and to accumulate funds as part of the normal annual assessments would not be reasonable. If such funding becomes necessary, the City may present a new or increased assessment to the property owners to support the projects.

3.3 Description of Improvements and Services

The purpose of this District is to fund the activities necessary to maintain and service the local streets and the drainage and flood control systems constructed and installed in connection with development of properties within the residential subdivision known as Las Lomas (Woodridge), Tract 2525-1 pursuant to approved development plans and agreements. The improvements may consist of all or a portion of the public streets, drainage and flood control facilities associated with Tract 2525-1 and the maintenance of these improvements may include but are not limited to the materials, equipment, labor, and incidental expenses deemed necessary to keep these improvements in satisfactory condition. The maintenance of the improvements and related activities shall be funded entirely or partially through the District assessments. Not

all improvements have been fully accepted by the City. It is anticipated that will occur within the next fiscal year at which time the costs of maintenance for those improvements will be charged to the district. The District improvements and services are generally described as:

- Street maintenance that may include but is not limited to the repair and servicing of street surfaces, curbs, gutters, bridges, driveway approaches, sidewalks, barricades, delineation, signage or other facilities within the public street rights-of-way installed in connection with the development of properties in Tract 2525-1 and that have been dedicated to the City;
- Storm drain and flood control maintenance that may include but is not limited to inspection, repair and servicing of drainage basins, inlets, catch basins, manholes, outlets, drywells, pumps, filters and storm drain pipes installed in connection with the development of properties of Tract 2525-1 as well as any off-site improvements and facilities directly associated with the aforementioned infrastructure that is deemed necessary to service or protect the properties including waste water treatment;
- The appurtenant, equipment, materials and service contracts related to the aforementioned improvements and facilities;
- Specifically excluded are those improvements or facilities: located on private property or common areas; that may be provided or maintained by an agency other than the City; that may be provided by another assessment or tax levied by the City; or that may be provided and maintained by a Homeowner's Association or similar entity.

Detailed maps and descriptions of the location and extent of the specific improvements to be maintained by the District are on file in the Office of Public Works and by reference are made part of this Report. Those portions of the District improvements that may be identified as general benefit or will be funded in whole or in part by other revenue sources as part of the approved development agreements, will not be included as part of the District assessments. The net annual cost to provide and maintain the improvements determined to be of special benefit shall be allocated to each property in proportion to the special benefits received.

3.3.1 STREET MAINTENANCE

The street maintenance program may include, but is not limited to: the repair of potholes, cracks or other failures in the asphalt surface; repair or replacement of curbs, gutters, driveway approaches and sidewalks as required as part of maintaining the streets; repair or installation of street signs, barricades, fencing or other delineation; mechanized sweeping and cleaning of the streets and gutters; slurry sealing, overlays and re-striping of the street surfaces. The specific activities and timing of various street and road maintenance services shall be determined by the City's Public Works Department as necessary to extend the life of the streets or to improve traffic circulation and safety as available funding permits. Specifically, the street improvements for this District are identified as:

- Approximately 290,610 square feet of asphalt street surface located on the various interior streets identified as Calle Milano, Eliano Street, Via Cielo, Avion Road, Alcotan Lane, and Azor Lane;
- Approximately 13,750 linear feet of curb and gutter along Calle Milano, Eliano Street, Via Cielo, Avion Road, Alcotan Lane, and Azor Lane;
- Approximately 1,480 linear feet of curb and gutter in and around the median islands on Calle Milano and at Via Cielo;



- Approximately 145 driveway approaches, 45,264 square feet of sidewalks and various street signs within the District;
- Specifically not included as part of the street maintenance program are the costs associated with major replacements or reconstruction. Although the District assessments will provide funding for regular maintenance and servicing of the improvements that will extend the useful life of the street improvements, the assessments are not intended to fund major replacements or reconstruction of the street surfaces or adjacent improvements such as curbs, gutters or driveway approaches. The costs of extensive replacement or reconstruction activities such as grinding and resurfacing of the asphalt; and replacement of curbs, gutters driveway approaches and sidewalks is significantly more than the amount that can reasonably be collected annually under the provisions of the 1982 Act. When such repairs or activities are deemed necessary, the City will consider various financing options including new or increased assessments for property owner approval.

The Public Works Department shall authorize the operational activities and maintenance of the public street and right-of-way improvements, facilities and services that may include, but are not limited to:

- Regular street sweeping services necessary to control dirt and debris on street surfaces and gutters;
- Annual inspection of street surface and repair of potholes and surface cracks as needed;
- Periodic slurry or overly of street surfaces and driveway approaches (typically one or the other once every five years);
- Periodic re-stripping of traffic lanes, bike lanes, street parking areas, crosswalks and intersections (typically in conjunction with slurry or overly activities);
- Graffiti abatement of public improvements within the street rights-of-way that are maintained by the District including but not limited to sandblasting, repainting and repair of fences, walls, barricades, sidewalks and signage as needed;
- Annual inspection and periodic repair or replacement of decorative street- pavers as needed;
- Annual inspection and minor repairs of curbs, gutters, driveway approaches and sidewalks including partial segment replacements as needed to ensure pedestrian and vehicle safety or the integrity of the street;
- Annual inspection and periodic repair or rehabilitation of street signs and traffic control devices;
- Annual inspection and repair of barricades, street-fencing, delineation or retaining walls within the street rights-of-way as needed.

A portion of the services described above are not performed on an annual basis but rather on a periodic basis, such as slurry sealing or overlaying the asphalt streets, and the funds necessary for these activities are collected in installments as part of the annual assessments. The monies collected each year for these services will be accumulated in a special fund of the District (Reserve Fund or Capital Improvement Fund). The monies accumulated for these activities shall be spent when sufficient funds have been accumulated to perform the services deemed necessary by the City (approximately every five years). This process of accumulating funds (installments) shall continue until such time the District is dissolved; or the City determines that such funding procedures require modification. Changes in the process of accumulating funds that would result in an increase to the annual assessment rate must be presented to the property owners for approval prior to imposing such an increase.

3.3.2 STORM DRAIN AND FLOOD CONTROL MAINTENANCE

The storm drain and flood control system associated with the District may include but is not limited to: drainage basins and bio-filters; channel ways; storm drain inlets, catch basins, manholes, outlets; drywells, pumps, filters and pipes. The storm drain system to be maintained primarily involves on-site facilities (within the District boundaries) but may also include off-site improvements such as water treatment equipment, facilities or services mandated or required by Federal, State or County regulations for water pollution control. The annual assessments for this District are intended to support a storm drain and flood control maintenance program that will adequately regulate and control storm water runoff resulting from the development of properties within the District. This maintenance program may include but is not limited to: inspection and documentation of the system; cleaning, servicing or repair of the facilities and equipment; and the partial replacement or rehabilitation of equipment and facilities. The storm drain and flood control system includes but is not limited to:

- Approximately 175,550 square feet of drainage basin area;
- Twenty-four (24) inlets, outlets and manholes located throughout Tract 2525-1;
- Approximately 4,965 linear feet of storm drain pipe ranging from 18 inches to 36 inches in diameter.

The Public Works Department shall authorize and schedule the operational activities and maintenance of the storm drain and storm water pollution treatment infrastructure, facilities and services that may include, but are not limited to:

- Cleaning of storm drain inlets, catch basins, manholes and pipes as needed;
- Stencil maintenance and documentation of facilities as required by Federal, State or County regulations;
- Cleaning and landscape maintenance of the drainage basins, bio-filter areas or channel ways as needed;
- Debris removal and pest control in and around the storm drain facilities as needed;
- Minor repairs and maintenance of the storm drain inlets, catch basins and outlets as needed;
- Street sweeping services necessary to control debris and water flow for the storm drain system; and,
- The operational costs related to NPDES compliance requirements.

A portion of the services described above are not performed on an annual basis but rather on a periodic basis such as minor repairs to the storm drain inlets, catch basins and outlets, and the funds necessary for these activities are collected in installments as part of the annual assessments. The monies collected each year for these services will be accumulated in a special fund of the District (Reserve Fund or Capital Improvement Fund). The monies accumulated for these activities shall be spent as needed to perform the services deemed necessary by the City. This process of accumulating funds (installments) shall continue until such time the District is dissolved; or the City determines that such funding procedures require modification. Changes in the process of accumulating funds that would result in an increase to the annual assessment rate must be presented to the property owners for approval prior to imposing such an increase.

4. ESTIMATE OF COSTS

Budget	2024/25 Assessment
DIRECT COSTS	
Streets, Roads & Storm Drain Improvements	
Street Maintenance	\$8,600
Drainage Maintenance Services	3,830
Inspection & Operational Services - Roads, Drainage	0
Total Annual Direct Costs	\$12,430
SPECIAL PROJECT	
	\$0
ADMINISTRATION EXPENSES	
City Annual Administration	\$1,960
City Operational Services	4,400
Engineer's Report & Services	3,890
Public Noticing	150
Total Annual Administration Costs	\$10,400
TOTAL DIRECT & ADMINISTRATION COSTS	\$22,830
CAPITAL RESERVE COLLECTIONS/(USES)	
Collection for Street Surface Activities	\$97,500
Collection for Repair Activities: Curbs, Gutters, Approaches & Sidewalks	12,500
Collection for Debris Removal	1,250
Collection for Storm Drain Infrastructure	3,020
Total Annual Capital Reserve Collections/(Uses)	\$114,270
LEVY ADJUSTMENTS	
Interest Income - Improvement Fund	(\$23,652)
Interest Income - Operating Reserve Fund	(418)
Reserve Fund Collection (Use)	(11,520)
Total Levy Adjustments	(\$35,590)
BALANCE TO LEVY	\$101,510
DISTRICT STATISTICS	
Total Parcels	191
Parcels Levied	181
Total EBU ⁽¹⁾	231.75
Levy per EBU	\$438.00
Maximum Levy per EBU	\$927.10
FUND BALANCE INFORMATION	
Beginning Operating Reserve Balance	\$14,424
Operational Reserve Interest	418
Surplus Transfer from Improvement Fund	35,588
Operational Reserve Collection (Use)	(35,590)
Ending Operating Reserve Balance	\$14,840
Beginning Improvement Fund Balance	\$737,776
Improvement Fund Interest	23,652
Surplus Transfer to Operations Fund	(35,588)
Improvement Fund Collection	114,270
Ending Improvement Fund Balance	\$840,110

⁽¹⁾ Levy per EBU rate does not include the County of San Luis Obispo fee of \$2.00 per parcel



5. METHOD OF ASSESSMENT

5.1 General

The 1982 Act permits the establishment of assessment districts by agencies for the purpose of providing for the maintenance, operation and servicing of drainage and flood control improvements as well as streets, roads and appurtenant facilities. The 1982 Act further requires that the cost of these improvements be levied according to benefit rather than assessed value:

“The amount of the assessment imposed on any parcel of property shall be related to the benefit to the parcel which will be derived from the provision of the service”.

Furthermore:

“The annual aggregate amount of the assessment shall not exceed the estimated annual cost of providing the service, except that the legislative body may, by resolution, determine that the estimated cost of work authorized ... is greater than can be conveniently raised from a single annual assessment and order that the estimated cost shall be raised by an assessment levied and collected in installments.... The revenue derived from the assessment shall not be used to pay the cost of any service other than the service for which the assessment was levied.”

The method of apportionment described in this Report for allocation of special benefit assessments utilizes commonly accepted engineering practices in compliance with the provisions of the 1982 Act and the California Constitution. The formulas used for calculating assessments reflects the composition of parcels within the District and the improvements and services provided, to fairly apportion the costs based on the special benefits to each parcel.

5.2 Benefit Analysis

Each of the proposed improvements and services, and the associated costs and assessments have been carefully reviewed, identified and allocated based on special benefit pursuant to the provisions of the 1982 Act and the California Constitution. The street and storm drain improvements associated with this District were necessary and essential requirements for the orderly development of the properties within the District to their full potential, consistent with the development plans and applicable portions of the City General Plan. As such the ongoing operation, servicing and maintenance of those improvements would otherwise be the direct financial obligation of each individual property owner. Since each parcel to be assessed within the District could not have been developed in the absence of these improvements and facilities, each parcel has a direct investment in the proper maintenance of the improvements that is over and above any general benefits that may be conferred by such improvements and services.

The ongoing maintenance and servicing of the District improvements is an integral part of the appearance, use and preservation of the properties within the District and such services to be funded by annual assessments confer a particular and distinct special benefit to those parcels. The proper maintenance of streets and appurtenant facilities allows individual parcels to be used to their fullest extent by ensuring the safe and efficient movement of people and goods to and from the benefiting properties Likewise, the maintenance and servicing of the storm drain system ensures proper water flow and control of excess



water during periods of rain, which is essential to preservation and protection of private property. Together the maintenance and servicing of the streets and storm drain system contributes to a specific enhancement of each of the parcels within the District and the absence of adequate maintenance and servicing of the District improvements could eventually have a negative impact on properties within the District.

Although the improvements may include public streets and storm drain facilities that connect to similar facilities outside the District boundaries, it is clear that the construction and installation of these improvements were only necessary for the development of properties within the District. As such, these improvements were not required nor necessarily desired by any properties or developments outside the District boundary and any public access or use of the improvements by others is incidental. Therefore, it has been determined that the ongoing maintenance, servicing and operation of the District improvements provide no measurable general benefit to properties outside the District or to the public at large, but clearly provide distinct and special benefits to properties within the District. Any improvement or portion thereof (particularly off-site storm drain facilities) that may be considered general benefit shall be funded by other revenue sources and not included as part of the special benefit assessments allocated to properties within this District. However, the costs associated with installation or improvement of any off-site facilities that benefit the parcels within this District as well as other properties (shared benefit) may be allocated to the parcels within the District based on their proportional special benefit from such improvements.

5.3 Assessment Methodology

The costs associated with the improvements and services shall be fairly distributed among the parcels based upon the special benefit received by each parcel. Additionally, in compliance with the California Constitution Article XIII D Section 4, each parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred to that parcel. The benefit formula used to determine the assessment obligation is therefore based upon both the improvements that benefit the parcels within the District as well as the proposed land use of each property as compared to other parcels that benefit from those specific improvements.

The method of apportionment established for this District and described herein, reflects the proportional special benefit each property receives from the improvements and services based on the actual or proposed land use of that parcel as compared to other properties within the District based on similarities and differences in parcel land use.

5.3.1 EQUIVALENT BENEFIT UNITS:

To assess benefits equitably it is necessary to relate each property's proportional special benefits to the special benefits of the other properties within the District. The method of apportionment established for most districts formed under the 1982 Act utilizes a weighted method of apportionment known as an Equivalent Benefit Unit (EBU) methodology that uses the single-family home site as the basic unit of assessment. A single-family home site equals one Equivalent Benefit Unit (EBU) and the other land uses are converted to a weighted EBU based on an assessment formula that equates the property's specific development status, type of development (land use), and size of the property, as compared to a single-family home site.



Although the Equivalent Benefit Unit method of apportioning special benefit is most commonly used and applied to districts that have a wide range of land use classifications (residential and non-residential use), this District is comprised of only residential properties and the following apportionment analysis of special benefit addresses only residential land uses. Not all land use types described in the following are necessarily applicable to the development of properties within this District, but are presented for comparison purposes to support the proportional special benefit applied to those land use types within the District.

5.3.2 EBU APPLICATION BY LAND USE:

- (1) **Single-family Residential** — This land use is defined as a fully subdivided residential home site with or without a structure. This land use is assessed 1.0 EBU per lot or parcel. This is the base value that the other properties are compared and weighted against (i.e. Equivalent Benefit Unit “EBU”).
- (2) **Multi-family Residential** — This land use is defined as a fully subdivided residential parcel that has more than one residential unit developed on the property. (This land use typically includes apartments, duplexes, triplex etc., but does not generally include condominiums, town-homes or mobile-home parks). Based on average population densities and size of the structure as compared to a typical single-family residential unit, multi-family residential parcels shall be proportionately assessed for the parcel’s total number of residential units utilizing a sliding benefit scale. Although multi-family properties typically receive similar benefits to that of a single-family residential, it would not be reasonable to conclude that on a per unit basis, the benefits are equal. Studies have consistently shown that the average multi-family unit impacts infrastructure approximately 75% as much as a single-family residence (Sample Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition). These various studies indicate that most public improvements and infrastructure are utilized and impacted at reduced levels by multi-family residential units and a similar reduction in proportional benefit is appropriate. Furthermore, it is also reasonable to conclude that as the density (number of units) increases, the proportional benefit per unit tends to decline because the unit size and people per unit usually decreases. Based on these considerations and the improvements provided by this District, an appropriate allocation of special benefit for multi-family residential properties as compared to a single-family residential property is best represented by the following special benefit assignment: 0.75 EBU per unit for the first 50 units; 0.50 EBU per unit for units 51 through 100; and 0.25 EBU per unit for the remaining units.
- (3) **Condominium/Town-home Units** — Condominiums and town-homes tend to share attributes of both single-family residential and multi-family residential properties and for this reason are identified as a separate land use classification. Like most single-family residential properties, these properties are not usually considered rental property and generally, the County assigns each unit a separate APN or assessment number. However, condominiums and town-homes often have similarities to multi-family residential properties in that they are generally zoned medium to high density and in some cases may involve multiple units on a single APN. In consideration of these factors, it has been determined that an appropriate allocation of special benefit for condominiums, town-homes and similar residential properties is best represented by an assignment of 0.75 EBU



per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to an APN. (There is no adjustment for parcels with more than five units).

- (4) Planned-Residential Development** — This land use is defined as any property for which a tentative or final tract map has been filed and approved (a specific number of residential lots and units has been identified) and the property is expected to be subdivided within the fiscal year or is part of the overall improvement and development plan for the District. This land use classification often times involves more than a single parcel (e.g. the approved tract map encompasses more than a single APN). Each parcel that is part of the approved tract map shall be assessed proportionately for the proposed or estimated residential type and units to be developed on that parcel as part of the approved tract map. Accordingly, each parcel is assigned an appropriate number of benefit units that reflects the development of that property at build-out. (The EBU assigned to each parcel shall represent the combination of single-family, condominium, multi-family units to be developed).
- (5) Vacant Residential** — This land use is defined as property currently zoned for residential development, but a tentative or final tract map for the property has not yet been approved. Based upon the opinions of professional appraisers who appraise market property values for real estate in California, the land value portion of a property typically ranges from 20 to 30 percent of the total value of a developed residential property (the average is about 25 percent). Although the assessed value of an individual property is not a direct reflection of the property's special benefit, this general correlation between land value and structure value does provide a reasonable basis for apportioning special benefit for vacant residential properties. Utilizing this twenty-five percent (25%) apportionment and the number of single-family residential units typically developed per acre of land (an average of 4 residential units per acre) an Equivalent Benefit Unit of 1.0 EBU per acre (4 units per acre x 25%) is derived and presents an appropriate apportionment of special benefit for vacant residential properties. Recognizing that the full and timely utilization of vacant property is reduced as the size of the property increases, it has been determined that the maximum EBU assigned to a vacant residential parcel shall not exceed 25.0 EBU (parcels in excess of 25 acres are assigned 25.0 EBU). Parcels less than one acre, shall be assigned a minimum of 1.0 EBU (similar to a vacant lot within a residential tract).
- (6) Exempt Parcels** — This land use identifies properties that are not assessed and are assigned 0.0 EBU. This land use classification may include but is not limited to:
- Lots or parcels identified as public streets and other roadways (typically not assigned an APN by the County);
 - Dedicated public easements including open space areas, utility rights-of-way, greenbelts, parkways, parks or other publicly owned properties that are part of the District improvements or may provide other benefits to private properties within the District.;
 - Private properties that cannot be developed independently from an adjacent property, such as common areas, sliver parcels or bifurcated lots or properties with very restrictive development use.

These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment, but shall be reviewed annually by the assessment engineer to confirm the parcels current development status. Government owned properties or public



properties are not necessarily exempt properties and shall be subject to special benefit assessment unless it qualifies for an exempt status.

- (7) Special Cases** — In many districts where multiple land use classifications are involved, there are usually one or more properties for which the standard land use classifications do not accurately identify the special benefits received from the improvements. For example, a parcel may be identified as a Vacant Residential property, however only a small percentage of the parcel’s total acreage can actually be developed. In this case, an appropriate calculation would be based on the net acreage that can be utilized rather than the gross acreage of the parcel.

The following table provides a summary of land use classifications and the Equivalent Benefit Unit calculations previously outlined.

Property Type	Equivalent Benefit Units	Multiplier
Single-family Residential	1.00	Per Unit/Lot/Parcel
Multi-family Residential	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Condominium/Townhome Units	0.75	Per Unit
Planned Residential Development	1.00	Per Planned SF Residential Lot
	0.75	Per Planned Condominium
	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Vacant Residential Land	1.00	Per Acre
Exempt Parcels	0.00	Per Parcel

The following formula is used to calculate each parcel’s EBU (proportional benefit).

$$\text{Parcel Type EBU} \times \text{Acres or Units} = \text{Parcel EBU}$$

The total number of Equivalent Benefit Units (EBU’s) is the sum of the individual EBU's applied to parcels that receive special benefit from the improvements. An assessment amount per EBU (Assessment Rate) for the improvements is established by taking the total cost of the improvements and dividing that amount by the total number of EBU’s of the parcels benefiting from the improvements. This Rate is then applied back to each parcel’s individual EBU to determine the parcel’s proportionate benefit and assessment obligation for the improvements.

$$\begin{aligned} \text{Total Balance to Levy} / \text{Total EBU} &= \text{Levy per EBU} \\ \text{Levy per EBU} \times \text{Parcel EBU} &= \text{Parcel Levy Amount} \end{aligned}$$

5.4 Assessment Range Formula

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218 (California Constitution Articles XIII C and XIII D), legislative changes in the Brown Act defined a "new or increased assessment" to exclude certain conditions. These conditions included "any



assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed." This definition and conditions were later confirmed through Senate Bill 919 (Proposition 218 implementing legislation).

The purpose of establishing an Assessment Range Formula is to provide for reasonable increases and inflationary adjustment to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District formation, the notice and assessment ballots presented to the property owners for approval included a maximum assessment amount for fiscal year 2005/2006 (initial maximum assessment), identification of the corresponding maximum assessment rate and a summary of the Assessment Range Formula described herein.

The Assessment Range Formula for this District shall be applied to the future assessments and is generally defined:

- If the proposed annual assessment (levy per EBU) for the upcoming fiscal year is less than or equal to the adjusted Maximum Assessment Rate, then the proposed annual assessment is not considered an increased assessment.
- The Maximum Assessment Rate is equal to the (Initial) Maximum Assessment Rate established for Fiscal Year 2005/2006 adjusted annually by the greater of, three percent (3%) or the annual percentage change in the Consumer Price Index (CPI) of "All Urban Consumers" for the San Francisco-Oakland-San Jose Area from February to February. The Maximum Assessment rate was increased by 3.000% for Fiscal Year 2024/25.

Beginning with Fiscal Year 2006/2007 and each fiscal year thereafter, the Maximum Assessment Rate has been recalculated and a new Maximum Assessment Rate established for the fiscal year utilizing the Assessment Range Formula described above. The Maximum Assessment Rate is calculated independent of the District's annual budget and proposed assessment. The annual percentage change in CPI is based on available data provided by the U.S. Department of Labor; Bureau of Labor Statistics at the time the annual Report is prepared. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the City Council for determining fluctuations in the cost of living. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the change the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties in the State of California. This CPI will be used going forward.

Any proposed annual assessment (rate per EBU) less than or equal to the calculated (adjusted) Maximum Assessment Rate is not considered an increased assessment, even if the proposed assessment is significantly greater than the assessment applied in the prior fiscal year. Likewise, modifications to the method of apportionment that increase the proportional special benefit assigned to a particular land use classification would be considered an increased assessment. Conversely, reductions in the proportional special benefit assigned to a land use classifications is permitted. Changes in land use or size of an individual property resulting in an assessment increase, is not considered an increased assessment.

To impose a new or increased assessment other than the annual inflationary adjustment provided by the preceding Assessment Range Formula, the City must comply with the provisions of the California Constitution Article XIID Section 4c, that requires a public hearing and certain protest procedures including



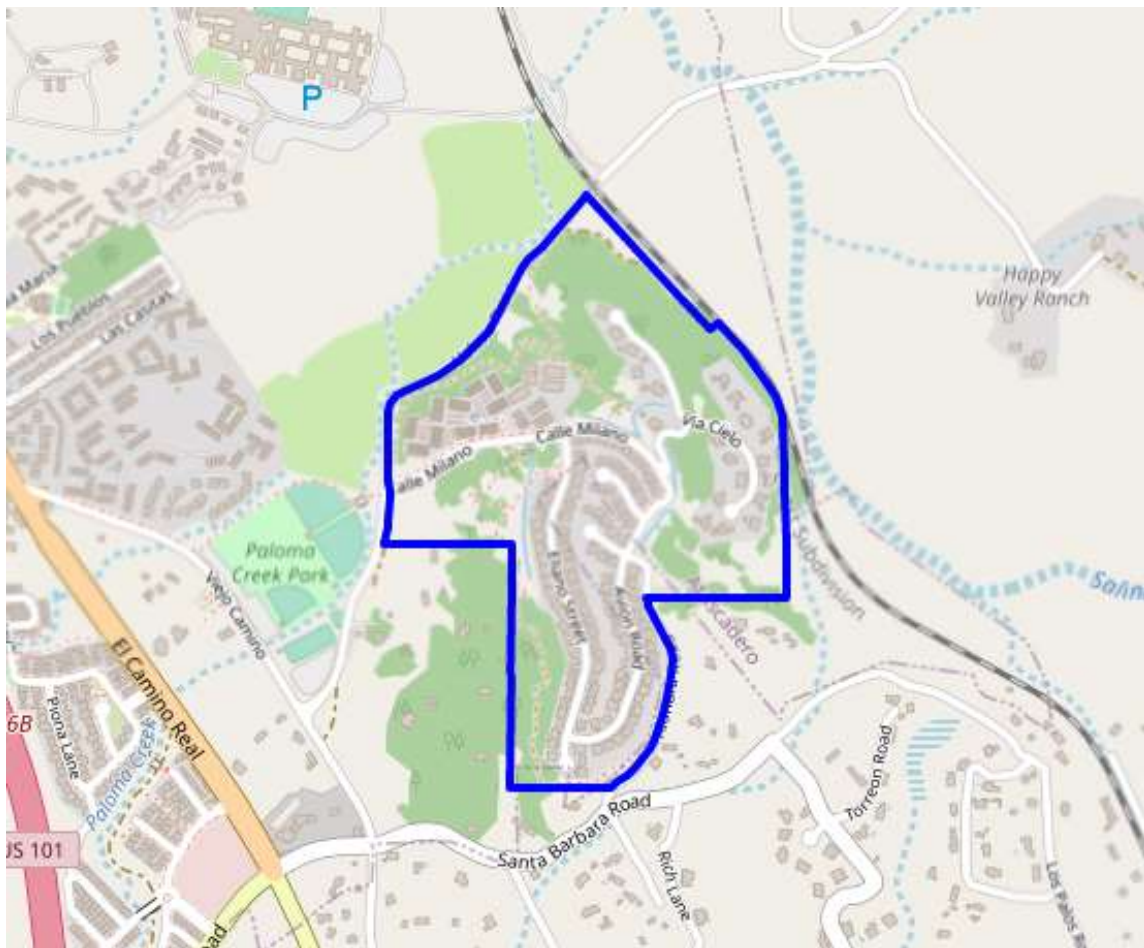
mailed notice of the public hearing and property owner protest balloting. Property owners through the balloting process must approve a proposed new or increased assessment before such an assessment may be imposed.



6. ASSESSMENT DIAGRAM

The parcels within the Street and Storm Drain Maintenance District No. 02 Las Lomas (Woodridge) consist of the lots, parcels and subdivisions of land located in the residential development known as Las Lomas (Woodridge), Tract 2525-1. The District covers approximately one hundred and eleven acres (111.20 acres) in the southeast portion of the City of Atascadero.

The following map is based on the District Diagram, the San Luis Obispo County Assessor's Maps and the San Luis Obispo County Assessor's information and identifies the parcels of land within the proposed District, as the same existed at the time the District was formed. The combination of the District Diagram on file with the City Clerk and the Assessment Roll contained in this Report constitute the District Assessment Diagram.



7. ASSESSMENT ROLL

Parcel identification for each lot or parcel within the District is based on the Assessment Diagram presented herein and is based on available parcel maps and property data from the San Luis Obispo County Assessor's Office at the time the Engineer's Report was prepared. A listing of the proposed lots and parcels to be assessed within this District along with the assessment amounts is provided herein.

Non-assessable lots or parcels may include but are not limited to public streets and other roadways (typically not assigned an APN by the County); dedicated public easements, open space areas, rights-of-way, common areas; landlocked parcels, small parcels vacated by the County, bifurcated lots, and any other property that cannot be developed or has little or no value. These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment.

If any parcel submitted for collection is identified by the County Auditor/Controller to be an invalid parcel number for the fiscal year, a corrected parcel number and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel or parcels shall be based on the method of apportionment and assessment rate described in this Report as approved by the City Council. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the assessment amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment amount.

City of Atascadero
Street & Storm Drain Maintenance No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-311-014	9341 DECHADO WAY	MFR	17.77	\$16,474.70	\$7,783.52
045-311-015	9261 LOS OLIVOS CIR	MFR	24.83	23,020.08	10,875.90
045-311-016	9110 CIRUELA WAY	MFR	19.90	18,449.44	8,716.50
045-312-001	9510 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-002	9520 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-003	11400 ELIANO ST	SFR	1.00	927.11	438.00
045-312-004	11390 ELIANO ST	SFR	1.00	927.11	438.00
045-312-005	11380 ELIANO ST	SFR	1.00	927.11	438.00
045-312-006	11370 ELIANO ST	SFR	1.00	927.11	438.00
045-312-007	11360 ELIANO ST	SFR	1.00	927.11	438.00
045-312-008	11350 ELIANO ST	SFR	1.00	927.11	438.00
045-312-009	11340 ELIANO ST	SFR	1.00	927.11	438.00
045-312-010	11320 ELIANO ST	SFR	1.00	927.11	438.00
045-312-011	11310 ELIANO ST	SFR	1.00	927.11	438.00
045-312-012	11305 ELIANO ST	SFR	1.00	927.11	438.00
045-312-013	11325 ELIANO ST	SFR	1.00	927.11	438.00
045-312-014	11335 ELIANO ST	SFR	1.00	927.11	438.00
045-312-015	11355 ELIANO ST	SFR	1.00	927.11	438.00
045-312-016	11365 ELIANO ST	SFR	1.00	927.11	438.00
045-312-017	11385 ELIANO ST	SFR	1.00	927.11	438.00
045-312-018	11395 ELIANO ST	SFR	1.00	927.11	438.00
045-312-019	11405 ELIANO ST	SFR	1.00	927.11	438.00
045-312-020	11415 ELIANO ST	SFR	1.00	927.11	438.00
045-312-021	11425 ELIANO ST	SFR	1.00	927.11	438.00
045-312-022	11435 ELIANO ST	SFR	1.00	927.11	438.00
045-312-023	9400 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-024	9410 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-025	9420 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-026	9430 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-027	9440 CALLE MILANO ST	SFR	1.00	927.11	438.00
045-312-028	9450 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-029	9460 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-030	9470 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-031	9480 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-032	9490 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-033	9500 CALLE MILANO	SFR	1.00	927.11	438.00
045-312-034	9510 CALLE MILANO RD	SFR	1.00	927.11	438.00
045-312-035	9520 CALLE MILANO RD	SFR	1.00	927.11	438.00
045-312-036	9535 AZOR LN	SFR	1.00	927.11	438.00
045-312-037	9525 AZOR LN	SFR	1.00	927.11	438.00
045-312-038	9515 AZOR LN	SFR	1.00	927.11	438.00
045-312-039	9505 AZOR LN	SFR	1.00	927.11	438.00

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-312-040	9495 AZOR LN	SFR	1.00	927.11	438.00
045-312-041	9485 AZOR LN	SFR	1.00	927.11	438.00
045-312-042	9475 AZOR LN	SFR	1.00	927.11	438.00
045-312-043	9465 AZOR LN	SFR	1.00	927.11	438.00
045-312-044	9470 AZOR LN	SFR	1.00	927.11	438.00
045-312-045	9480 AZOR RD	SFR	1.00	927.11	438.00
045-312-046	9500 AZOR LN	SFR	1.00	927.11	438.00
045-312-047	9520 AZOR LN	SFR	1.00	927.11	438.00
045-312-048	9530 AZOR LN	SFR	1.00	927.11	438.00
045-312-049	9540 AZOR LN	SFR	1.00	927.11	438.00
045-312-050	9550 AZOR LN	SFR	1.00	927.11	438.00
045-312-051	9515 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-052	9505 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-053	9495 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-054	9485 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-055	9475 ALCOTAN RD	SFR	1.00	927.11	438.00
045-312-056	9500 ALCOTAN RD	SFR	1.00	927.11	438.00
045-313-001	11455 MONTE VERDE DR	SFV	1.00	927.11	438.00
045-313-002	9500 VIA CIELO	SFR	1.00	927.11	438.00
045-313-003	9550 VIA CIELO	SFR	1.00	927.11	438.00
045-313-004	9600 VIA CIELO RD	SFR	1.00	927.11	438.00
045-313-005	9650 VIA CIELO RD	SFR	1.00	927.11	438.00
045-313-006	9700 VIA CIELO RD	SFR	1.00	927.11	438.00
045-313-007	9655 VIA CIELO RD	SFR	1.00	927.11	438.00
045-313-008	9625 VIA CIELO	SFR	1.00	927.11	438.00
045-313-009	9575 VIA CIELO	SFR	1.00	927.11	438.00
045-313-010	9565 VIA CIELO	SFR	1.00	927.11	438.00
045-313-011	9555 VIA CIELO	SFR	1.00	927.11	438.00
045-313-012	9505 VIA CIELO	SFR	1.00	927.11	438.00
045-313-013	9515 VIA CIELO	SFR	1.00	927.11	438.00
045-313-014	9525 VIA CIELO	SFR	1.00	927.11	438.00
045-313-015	9535 VIA CIELO	SFR	1.00	927.11	438.00
045-313-018	9350 VIA CIELO	SFR	1.00	927.11	438.00
045-313-019	9402 VIA CIELO LN	SFR	1.00	927.11	438.00
045-313-020	9450 VIA CIELO	SFR	1.00	927.11	438.00
045-313-021	11450 MONTE VERDE	SFR	1.00	927.11	438.00
045-313-026	9250 VIA CIELO	SFR	1.00	927.11	438.00
045-313-027	9300 VIA CIELO	SFR	1.00	927.11	438.00
045-314-001	11290 ELIANO ST	SFR	1.00	927.11	438.00
045-314-002	11280 ELIANO ST	SFR	1.00	927.11	438.00
045-314-003	11270 ELIANO ST	SFR	1.00	927.11	438.00
045-314-004	11260 ELIANO ST	SFR	1.00	927.11	438.00

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-314-005	11250 ELIANO ST	SFR	1.00	927.11	438.00
045-314-006	11240 ELIANO ST	SFR	1.00	927.11	438.00
045-314-007	11220 ELIANO ST	SFR	1.00	927.11	438.00
045-314-008	11215 ELIANO ST	SFR	1.00	927.11	438.00
045-314-009	11225 ELIANO ST	SFR	1.00	927.11	438.00
045-314-010	11235 ELIANO ST	SFR	1.00	927.11	438.00
045-314-011	11245 ELIANO ST	SFR	1.00	927.11	438.00
045-314-012	11255 ELIANO ST	SFR	1.00	927.11	438.00
045-314-013	11265 ELIANO ST	SFR	1.00	927.11	438.00
045-314-014	11275 ELIANO ST	SFR	1.00	927.11	438.00
045-314-015	11285 ELIANO ST	SFR	1.00	927.11	438.00
045-314-016	11290 AVION RD	SFR	1.00	927.11	438.00
045-314-017	11280 AVION RD	SFR	1.00	927.11	438.00
045-314-018	11270 AVION RD	SFR	1.00	927.11	438.00
045-314-019	11260 AVION RD	SFR	1.00	927.11	438.00
045-314-020	11250 AVION RD	SFR	1.00	927.11	438.00
045-314-021	11240 AVION RD	SFR	1.00	927.11	438.00
045-314-022	11230 AVION RD	SFR	1.00	927.11	438.00
045-314-023	11210 AVION RD	SFR	1.00	927.11	438.00
045-314-024	11200 AVION RD	SFR	1.00	927.11	438.00
045-314-025	11205 AVION RD	SFR	1.00	927.11	438.00
045-314-026	11215 AVION RD	SFR	1.00	927.11	438.00
045-314-027	11225 AVION RD	SFR	1.00	927.11	438.00
045-314-028	11235 AVION RD	SFR	1.00	927.11	438.00
045-314-029	11245 AVION RD	SFR	1.00	927.11	438.00
045-314-030	11255 AVION RD	SFR	1.00	927.11	438.00
045-314-031	11275 AVION RD	SFR	1.00	927.11	438.00
045-314-032	11285 AVION RD	SFR	1.00	927.11	438.00
045-314-033	11295 AVION RD	SFR	1.00	927.11	438.00
045-315-001	11210 ELIANO ST	SFR	1.00	927.11	438.00
045-315-002	11190 ELIANO ST	SFR	1.00	927.11	438.00
045-315-003	11180 ELIANO ST	SFR	1.00	927.11	438.00
045-315-004	11170 ELIANO ST	SFR	1.00	927.11	438.00
045-315-005	11160 ELIANO ST	SFR	1.00	927.11	438.00
045-315-006	11150 ELIANO ST	SFR	1.00	927.11	438.00
045-315-007	11140 ELIANO ST	SFR	1.00	927.11	438.00
045-315-008	11130 ELIANO ST	SFR	1.00	927.11	438.00
045-315-009	11120 ELIANO ST	SFR	1.00	927.11	438.00
045-315-010	11105 ELIANO ST	SFR	1.00	927.11	438.00
045-315-011	11115 ELIANO ST	SFR	1.00	927.11	438.00
045-315-012	11125 ELIANO ST	SFR	1.00	927.11	438.00
045-315-013	11100 AVION RD	SFR	1.00	927.11	438.00

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-315-014	11165 ELIANO ST	SFR	1.00	927.11	438.00
045-315-015	11185 ELIANO ST	SFR	1.00	927.11	438.00
045-315-016	11195 ELIANO ST	SFR	1.00	927.11	438.00
045-315-017	11205 ELIANO ST	SFR	1.00	927.11	438.00
045-315-018	11180 AVION RD	SFR	1.00	927.11	438.00
045-315-019	11170 AVION RD	SFR	1.00	927.11	438.00
045-315-020	11160 AVION RD	SFR	1.00	927.11	438.00
045-315-021	11150 AVION RD	SFR	1.00	927.11	438.00
045-315-022	11130 AVION RD	SFR	1.00	927.11	438.00
045-315-023	11110 AVION RD	SFR	1.00	927.11	438.00
045-315-024	11105 AVION RD	SFR	1.00	927.11	438.00
045-315-025	11115 AVION RD	SFR	1.00	927.11	438.00
045-315-026	11125 AVION RD	SFR	1.00	927.11	438.00
045-315-027	11135 AVION RD	SFR	1.00	927.11	438.00
045-315-028	11145 AVION RD	SFR	1.00	927.11	438.00
045-315-029	11155 AVION RD	SFR	1.00	927.11	438.00
045-315-030	11165 AVION RD	SFR	1.00	927.11	438.00
045-315-031	11175 AVION RD	SFR	1.00	927.11	438.00
045-315-032	11185 AVION RD	SFR	1.00	927.11	438.00
045-315-033	11195 AVION RD	SFR	1.00	927.11	438.00
045-316-041	9350 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-042	9352 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-043	9354 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-044	9356 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-045	9358 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-046	9360 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-047	9362 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-048	9364 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-049	9366 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-050	9368 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-051	9369 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-052	9367 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-053	9374 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-054	9363 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-055	9361 RIBERENA CIR	CON	0.75	695.33	328.50
045-316-056	9355 RANADA CIR	CON	0.75	695.33	328.50
045-316-057	9357 RANADA CIR	CON	0.75	695.33	328.50
045-316-058	9359 RANADA CIR	CON	0.75	695.33	328.50
045-316-059	9361 RANADA CIR	CON	0.75	695.33	328.50
045-316-060	9363 RANADA CIR	CON	0.75	695.33	328.50
045-316-061	9371 CADENCIA CT	CON	0.75	695.33	328.50
045-316-062	9373 CADENCIA CT	CON	0.75	695.33	328.50

Slight variances may occur due to rounding

City of Atascadero
Street & Storm Drain Maintenance No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-316-063	9375 CADENCIA CT	CON	0.75	695.33	328.50
045-316-064	9377 CADENCIA CT	CON	0.75	695.33	328.50
045-316-065	9379 CADENCIA CT	CON	0.75	695.33	328.50
045-316-066	9381 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-067	9383 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-068	9385 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-069	9387 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-070	9389 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-071	9388 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-072	9386 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-073	9384 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-074	9382 CIELO AZUL CT	CON	0.75	695.33	328.50
045-316-075	9380 CIELO AZUL CT	CON	0.75	695.33	328.50
181 Accounts			231.75		\$101,507.42
181 Total Accounts			231.75		\$101,507.42

Slight variances may occur due to rounding

DRAFT RESOLUTION D

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, INITIATING PROCEEDINGS FOR ANNUAL LEVY OF ASSESSMENTS FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 02 (WOODRIDGE) FOR FISCAL YEAR 2024/2025 PURSUANT TO THE PROVISIONS OF PART 2 OF DIVISION 15 OF THE CALIFORNIA STREETS AND HIGHWAYS CODE

The City Council of the City of Atascadero (hereafter referred to as “City Council”) hereby finds, determines, resolves and orders as follows:

WHEREAS, the City Council has, by previous Resolutions, formed the Atascadero Landscaping and Lighting Maintenance District No. 02 (Woodridge) (hereafter referred to as “District”) pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2 of Division 15 of the Streets and Highways Code of California, beginning with Section 22500* (hereafter referred to as the “Act”) that provides for levy and collection of assessments by the County of San Luis Obispo for the City of Atascadero to pay the maintenance and services of lighting facilities, landscaping, and appurtenant facilities and operations related thereto; and

WHEREAS, the District and the associated assessments are in compliance with the provisions of California Constitution Article XIID; and

WHEREAS, the City Council has retained NBS for the purpose of assisting with the Annual Levy of the District and to prepare and file a report with the City Clerk in accordance with the Act.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. Engineer’s Annual Levy Report: The City Council hereby orders NBS to prepare the Engineer’s Annual Levy Report concerning the levy of assessments for the District in accordance with *Chapter 3, Section 22622* of the Act.

SECTION 2. Proposed Improvements and Any Substantial Changes in Existing Improvements: The improvements within the District include the ongoing operation, administration, maintenance, servicing and incidental expenses related to the dedicated landscape areas, public street lighting and appurtenant facilities authorized pursuant to the Act that were installed as part of property development and associated with the District. Said improvements may include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or right-of-ways constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District. The Engineer's Annual Levy Report describes any new improvements or substantial changes in existing improvements.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION E

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, FOR PRELIMINARY APPROVAL OF THE ENGINEER'S ANNUAL LEVY REPORT FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 02 (WOODRIDGE) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) does resolve as follows:

WHEREAS, the City Council has, by previous Resolutions, ordered the preparation of an Engineer's Annual Levy Report (hereafter referred to as the “Report”) for the district known and designated as the Atascadero Landscaping and Lighting Maintenance District No. 02 (Woodridge) (hereafter referred to as the “District”) pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2 of Division of the Streets and Highways Code of California, beginning with Section 22500* (hereafter referred to as the “Act”); and

WHEREAS, the District and the associated assessments are in compliance with the provisions of California Constitution Article XIID; and

WHEREAS, the City Council has now been presented with the Report as required by *Chapter 1, Article 4, Section 22566* of said Act; and

WHEREAS, the City Council has carefully examined and reviewed the Report as presented and is preliminarily satisfied with the Report, each of the budget items and documents as set forth therein and is satisfied on a preliminary basis that the proposed assessments have been spread in accordance with the benefits received from the improvements, operation, maintenance, and services to be performed within each benefit zone as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero as follows:

SECTION 1. The above recitals are true and correct.

SECTION 2. That the presented Report consists of the following:

- a. A Description of the Improvements
- b. The Annual Budget (Costs and Expenses of Services, Operation, and Maintenance)
- c. The Method of Apportionment that details the method of calculating each parcel's proportional special benefits and annual assessment.
- d. The District Roll containing the proposed assessment for each parcel within the District for Fiscal Year 2024/2025.

SECTION 3. The Report is hereby approved on a preliminary basis and ordered to be filed in the Office of the City Clerk as a permanent record and to remain open to public inspection.

SECTION 4. That the City Clerk shall certify to the passage and adoption of this Resolution, and the minutes of this meeting shall so reflect the presentation of the Report.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT RESOLUTION F

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AND COLLECT ASSESSMENTS FOR THE ATASCADERO LANDSCAPING AND LIGHTING MAINTENANCE DISTRICT NO. 02 (WOODRIDGE) FOR FISCAL YEAR 2024/2025

The City Council of the City of Atascadero (hereafter referred to as “City Council”) does resolve as follows:

WHEREAS, The City Council has by previous Resolution initiated proceedings for fiscal year 2024/2025 regarding the levy and collection of assessments for the Atascadero Landscaping and Lighting District No. 02 (Woodridge) (hereafter referred to as the “District”). Pursuant to the provisions of the *Landscaping and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with section 22500)* (hereafter referred to as the “Act”), assessments for the District shall be levied and collected by the County of San Luis Obispo for the City of Atascadero to pay the maintenance and services of the improvements and facilities related thereto; and

WHEREAS, the proposed District assessments for fiscal year 2024/2025 are less than or equal to the maximum assessments previously approved in accordance with the requirements of the California Constitution, Article XIID; and

WHEREAS, there has now been presented to this City Council an Engineer’s Annual Levy Report (hereafter referred to as the “Engineer’s Report”), and said Engineer’s Report has been filed with the City Clerk in accordance with the Act; and

WHEREAS, the City Council has examined and reviewed the Engineer’s Report as presented and is satisfied with the Report, each of the budget items and documents as set forth therein and is satisfied that the proposed assessments contained therein, have been spread in accordance with the benefits received from the improvements, operation, maintenance and services to be performed within the District, as set forth in said Report.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero pursuant to Chapter 3, Section 22624 of the Act, as follows:

SECTION 1. The above recitals are true and correct.

SECTION 2. The City Council hereby declares its intention to seek the annual levy and collection of assessments within the District pursuant to the Act, over and including the lands, lots and parcels within the District boundary. The City Council further declares its intention to levy and collect assessments on such land to pay the annual costs and expenses of the improvements and services described in Section 4 of this Resolution, for fiscal year 2024/2025.

SECTION 3. The boundaries of the District are described in the Engineer’s Report and are consistent with the boundary established and described in the original formation documents, on file with the City Clerk, and incorporated herein by reference. The District is within the boundaries of the City of Atascadero, within the County of San Luis Obispo, State of California and includes the territory known as Woodridge and referred to as the “Atascadero Landscaping and Lighting District No. 02”.

SECTION 4. The improvements within the District include the ongoing maintenance, operation and servicing of local landscaping and street lighting improvements established or installed in connection with development of properties within the District. These improvements generally include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District.

SECTION 5. The proposed assessments for fiscal year 2024/2025, as outlined in the Engineer’s Report, do not exceed the maximum assessment approved by the property owners through a property owner balloting proceeding conducted in 2005. As such, the proposed assessments do not constitute an increased assessment and do not require additional property owner approval in accordance with the requirements of the California Constitution, Article XIID.

SECTION 6. The City Council hereby declares its intention to conduct a Public Hearing concerning the District and the levy of assessments in accordance with *Chapter 3, Section 22626* of the Act.

SECTION 7. Notice is hereby given that a Public Hearing on these matters will be held by the City Council on Tuesday, June 25, 2024, at 6:00 p.m., at the City Council Chambers, 6500 Palma Avenue, Atascadero, California or as soon thereafter as feasible. At the Public Hearing, all interested persons shall be given an opportunity to hear and be heard on the proposed assessment to be levied for fiscal year 2024/2025 as contained in the Engineer’s Report on file in the City Clerk’s Office.

SECTION 8. The City Clerk shall give notice of the time and place of the Public Hearing to all property owners within the District pursuant to Sections 22626, 22552 and 22553 of the Act and 6061 of the Government Code by publishing this Resolution of Intention in a local newspaper one time at least 10 days prior to the Public Hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of _____, 2024.

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

CITY OF ATASCADERO

Fiscal Year 2024/25 Engineer's Report For:

Landscaping and Lighting District

District No. 02 Las Lomas (Woodridge)

May 2024

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

CITY OF ATASCADERO
Landscaping & Lighting District No. 02
Las Lomas (Woodridge)

6500 Palma Avenue
Atascadero, CA 93422
Phone – (805) 461-5000
Fax – (805) 461-7612

CITY COUNCIL

Heather Moreno, Mayor

Susan Funk, Mayor Pro Tem

Charles Bourbeau, Council Member

Mark Dariz, Council Member

Heather Newsom, Council Member

AGENCY STAFF

Jim Lewis, City Manager

Jeri Rangel, Administrative Services Director

Cindy Chavez, Deputy Director of Administrative Services

NBS

Tim Seufert, Client Services Director

Adina McCargo, Project Manager

Danielle Robison, Administrator

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1. ENGINEER’S LETTER

WHEREAS, on March 24, 2005 by Resolution No. 2005-051, the City Council of the City of Atascadero (the “City”), State of California, in accordance with and pursuant to the Landscape and Lighting Act of 1972, Part 2, Division 15 of the California Streets and Highways Code (commencing with Section 22500 (the “1972 Act”) established the City of Atascadero Landscaping and Lighting District No. 02 Las Lomas (Woodridge) (the “District”); and

WHEREAS, on May 28, 2024 the City Council, under the 1972 Act, adopted its Resolution Initiating Proceedings for the Annual Levy of Assessments and Ordering the Preparation of an Engineer’s Report for the District; and

WHEREAS, the Resolution Initiating Proceedings directed NBS to prepare and file a report describing the general nature, location, and extent of the improvements to be maintained; an estimate of the costs of the maintenance, operations, and servicing of the improvements for the District for the referenced fiscal year; a diagram for the District, showing the area and properties to be assessed; and an assessment of the estimated costs of the administration, maintenance, operations, and servicing the improvements, assessing the net amount upon all assessable lots and/or parcels within the District in proportion to the special benefit received.

NOW THEREFORE, the assessments as detailed in this Engineer’s Report and as summarized in the table below are made to cover the portion of the estimated costs of maintenance, operation and servicing of the improvements to be paid by the assessable real property within the District in proportion to the special benefit received. The following table summarizes the proposed assessment for Fiscal Year 2024/25:

FY 2024/25 Budget Summary

Description	Total Costs	Costs Not Assessed	Proposed Assessment	Total Benefit Units	Maximum Rate	Proposed Rate Per BU
Annual Maintenance	\$89,080	(\$2,250)	\$86,830			
Special Project	13,000	0	13,000			
Administration	6,910	0	6,910			
Capital Reserve Collections/(Use)	1,567	(250)	1,317			
Levy Adjustments	(\$34,543)	\$2,500	(\$32,043)			
Total	\$76,014	\$0	\$76,014	231.75	\$2,302.26	\$328.00

I, the undersigned, respectfully submit the enclosed Engineer’s Report and, to the best of my knowledge, information, and belief, the Engineer’s Report, Assessments, and the Assessment Diagram herein have been prepared, computed, and levied in accordance with the assessment methodology adopted, approved, and ordered by the City Council of the City of Atascadero and the 1972 Act.

City Engineer



2. EXECUTIVE SUMMARY

Pursuant to the provisions of the Landscaping and *Lighting Act of 1972*, being *Part 2 of Division 15* of the *California Streets and Highways Code*, commencing with *Section 22500* (hereafter referred to as the “1972 Act”), and in compliance with the substantive and procedural requirements of the California State Constitution Article XIID (hereafter referred to as “Article XIID”), the City Council of the City of Atascadero, County of San Luis Obispo, State of California (hereafter referred to as “City”), executed the proceedings required for the establishment of the special benefit assessment district designated as:

Landscaping and Lighting District No. 02 Las Lomas (Woodridge)

(hereafter referred to as the “District”), which includes the lots and parcels of land within the residential subdivision known as Las Lomas (Woodridge), Tract 2525-1 within the City limits of the City. This Engineer’s Report (hereafter referred to as the “Report”) has been prepared in connection with the levy and collection of annual assessments related thereto for Fiscal Year 2024/25, as required pursuant to Chapter 1, Article 4 of the 1972 Act.

The City Council formed the District, and provided for the levy and collection of annual assessments on the County tax rolls to provide ongoing funding for the costs and expenses required to service and maintain the landscaping and lighting improvements associated with and resulting from the development of properties within the District. The improvements to be provided by the District and the assessments described herein are made pursuant to the 1972 Act and the substantive and procedural provisions of Article XIID.

This Report describes the District, the improvements, and the proposed assessments to be levied against properties in connection with the special benefits the properties will receive from the maintenance and servicing of the District improvements. The annual assessments will provide a funding source for the continued operation and maintenance of public landscaping and lighting improvements installed in connection with the development of properties within the District.

The improvements and assessments described in this Report are based on the planned development of properties within the District and represent an estimate of the direct expenditures, incidental expenses, and fund balances that will be necessary to maintain and service the improvements. The boundaries of the District, the proposed improvements, the method of apportionment, and assessments described herein are based on current development plans and specifications for Tract 2525-1; and by reference these plans and specifications are made part of this Report.

The word “parcel,” for the purposes of this Report, refers to an individual property assigned its own Assessor’s Parcel Number (APN) by the San Luis Obispo County Assessor’s Office. The San Luis Obispo County Auditor/Controller uses Assessor’s Parcel Numbers and specific Fund Numbers to identify properties to be assessed on the tax roll for the special benefit assessments.

As part of the District formation, the City of Atascadero conducted a Property Owner Protest Ballot proceeding for the proposed levy of a new assessment pursuant to the provisions of the California Constitution, Article XIID Section 4. In conjunction with this ballot proceeding, the City Council conducted a noticed public hearing on May 24, 2005 to consider public testimonies, comments and written protests regarding the formation of the District and levy of assessments. Upon conclusion of the public hearing,



property owner protest ballots received were opened and tabulated to determine whether majority protest existed (ballots were weighted based on assessment amounts), and by resolution the City Council confirmed the results of the ballot tabulation. Tabulation of the ballots indicated that majority protest did not exist for the proposed assessments and the assessment range formula presented and described herein, the City Council approved the Report (as submitted or amended), ordered the formation of the District, and approved the levy and collection of assessments. The assessments for Fiscal Year 2005/2006 were submitted to the San Luis Obispo County Auditor/Controller for inclusion on the property tax roll for each parcel.

Each subsequent fiscal year, an Engineer's Report shall be prepared and presented to the City Council describing the District any changes to the District or improvements and the proposed budget and assessments for that fiscal year and the City Council shall hold a noticed public hearing regarding these matters prior to approving and ordering the proposed levy of assessments. If the proposed assessments for the District exceed the maximum assessment described herein (as approved by the property owners), the new or increased assessment must be confirmed through another property owner protest ballot proceeding before such an assessment may be imposed. It should be noted that an increased assessment to an individual property resulting from changes in development or land use does not constitute an increased assessment.

3. PLANS AND SPECIFICATIONS

3.1 Description of the District

The territory within the District consists of the lots, parcels and subdivisions of land within the residential subdivision known as the Las Lomas (Woodridge), Tract 2525-1, which encompasses an area of land totaling approximately one hundred and eleven acres (111.20 acres).

This residential subdivision includes one hundred forty-three (143) single-family residential units; thirty-five (35) condominium/senior housing units; and a single one hundred (100) unit multi-family residential project at build-out. Due to parcel splits the multi-family residential project is spread over three parcels. The planned subdivision is situated in the southeast portion of the City of Atascadero and is generally located:

- South and east of Halcon Road;
- East of Highway 101 and El Camino Real
- South and west of the Southern Pacific Railroad Tracks; and
- North of Salinas Road and Santa Cruz Road

3.2 Improvements and Services Authorized by the 1972 Act

As generally defined by the 1972 Act and applicable to this District, the improvements and associated assessments may include one or more of the following:

- 1) The installation or planting of landscaping;
- 2) The installation or construction of statuary, fountains, and other ornamental structures and facilities;
- 3) The installation or construction of public lighting facilities including, but not limited to street lights and traffic signals;
- 4) The installation or construction of any facilities which are appurtenant to any of the foregoing or which are necessary or convenient for the maintenance or servicing thereof;
- 5) The installation of park or recreational improvements, including, but not limited to, all of the following:
 - a) Land preparation, such as grading, leveling, cutting and filling, sod, landscaping, irrigation systems, sidewalks, and drainage.
 - b) Lights, playground equipment, play courts, and public restrooms.
- 6) The acquisition of land for park, recreational, or open-space purposes or any existing improvement otherwise authorized pursuant to this section.
- 7) The maintenance or servicing, of any of the foregoing including the furnishing of services and materials for the ordinary and usual maintenance, operation, and servicing of any improvement including but not limited to:
 - a) Repair, removal, or replacement of all or any part of any improvements;
 - b) Grading, clearing, removal of debris, the installation or construction of curbs, gutters, walls, sidewalks, or paving, or water, irrigation, drainage, or electrical facilities;



- c) Providing for the life, growth, health, and beauty of landscaping, including cultivation, irrigation, trimming, spraying, fertilizing, or treating for disease or injury;
 - d) The removal of trimmings, rubbish, debris, and other solid waste;
 - e) The cleaning, sandblasting, and painting of walls and other improvements to remove or cover graffiti;
 - f) Electric current or energy, gas, or other illuminating agent for any public lighting facilities or for the lighting or operation of any other improvements;
 - g) Water for the irrigation of any landscaping, the operation of any fountains, or the maintenance of any other improvements.
- 8) Incidental expenses associated with the improvements including, but not limited to:
- a) The cost of preparation of the report, including plans, specifications, estimates, diagram, and assessment;
 - b) The costs of printing, advertising, and the publishing, posting and mailing of notices;
 - c) Compensation payable to the County for collection of assessments;
 - d) Compensation of any engineer or attorney employed to render services;
 - e) Any other expenses incidental to the construction, installation, or maintenance and servicing of the improvements;
 - f) Costs associated with any elections held for the approval of a new or increased assessment.

3.3 Description of Improvements and Services

The purpose of this District is to ensure the ongoing maintenance, operation and servicing of local landscaping and street lighting improvements established or installed in connection with development of properties within the District. The improvements may consist of all or a portion of the public landscaped areas, street lighting and appurtenant facilities within and adjacent to the District (Tract 2525-1). These improvements generally include, but are not limited to the materials, equipment, utilities, labor, appurtenant facilities and expenses necessary for the ongoing maintenance and operation of public street lighting as well as landscaped parkways, medians, slopes, trails, park areas, drainage basins, open space areas and other designated easements or rights-of-way constructed and installed as part of the development plans and agreements approved for the development of each lot and parcel within the District. The improvements to be maintained and funded entirely or partially through the District assessments are generally described as:

- Streetscape landscaping including street trees located on the perimeter of the development and interior streets of Tract 2525-1 that are within the public rights-of-way or easements and dedicated to the City for maintenance;
- Open space areas and fuel modification areas within or adjacent to the District boundaries;
- Park areas, recreational equipment, trails and landscaped drainage facilities developed and constructed as part of developing properties within Tract 2525-1;
- Public lighting facilities including street lighting, safety lighting and ornamental lighting installed as part of the residential development or landscaped improvement areas
- Appurtenant facilities, equipment, materials and utilities related to the aforementioned improvements;



- Specifically not included as District improvements are those improvements located on private property, improvements and facilities that may be provided or maintained by an agency other than the City; improvements and facilities that may be provide by another assessment or tax levied by the City or any improvement provided and maintained by a Homeowner’s Association or similar entity.

Detailed maps and descriptions of the location and extent of the specific improvements to be maintained by the District are on file in the Office of Public Works and by reference are made part of this Report. Those portions of the District improvements that may be identified as general benefit or will be funded in whole or in part by other revenue sources as part of the approved development agreements, will not be included as part of the District assessments. The net annual cost to provide and maintain the improvements determined to be of special benefit shall be allocated to each property in proportion to the special benefits received.

3.3.1 LANDSCAPE IMPROVEMENTS

The landscape improvements for the District may include, but are not limited to turf, ground cover, shrubs and plants, trees, irrigation and drainage systems, ornamental lighting, masonry walls or other fencing, hardscape improvements, monuments, and associated appurtenant facilities located within the landscape easements or public rights-of-way. Specifically, the landscape improvement areas for this District are identified as:

- Approximately 34,420 square feet of streetscape landscaping and trees within the public rights-of-way along or adjacent to Halcon Road, Calle Milano, Via Cielo and Eliano Street including but not limited to approximately 27,200 square feet of parkway landscaping and 7,220 square feet of median landscaping;
- Approximately 220,850 square feet (5.07 acres) of landscaped slope areas within the District boundaries and adjacent to the residential properties, open space areas, drainage basins and streets of Tract 2525-1;
- Approximately 175,550 square feet (4.03 acres) of landscaped area in and around the two (2) drainage basins within Tract 2525-1;
- Approximately 106,460 square feet of non-irrigated open space area within the District;
- Approximately 1,981,980 square feet of non-irrigated open space area within the boundaries of the District associated with the development of the residential properties within Tract 2525-1;
- Approximately 225 street trees located within the public rights-of-way of the streets within Tract 2525-1 including but not limited to Calle Milano, Via Cielo, Eliano Street, Avion Road, Azor Lane and Alcotan Lane;
- Approximately 1,910 square feet of paths and trails, 45,265 square feet sidewalks and 6,100 linear feet of fencing within and adjacent to the various landscape improvement areas.

3.3.2 PUBLIC LIGHTING IMPROVEMENTS

The lighting improvements may include but are not limited to the cost of providing electrical energy and servicing of lighting fixtures, poles, meters, conduits, electrical cable and associated appurtenant facilities associated with:



- There are five (5) public streetlights currently planned for Tract 2525-1. These streetlights are located on Calle Milano between Halcon Road and Eliano Street (The entryway to the residential properties within the District);
- Lighting facilities may also include but are not limited to safety lights, security lights or ornamental lights located within the various landscape improvement areas installed as part of the District's landscape improvements.

4. ESTIMATE OF COSTS

BUDGET	Total Budget	Costs Not Assessed	2024/25 Assessment
DIRECT COSTS			
Annual Costs			
Landscape Services	\$65,000	(2,250)	\$62,750
Landscape Supplies	2,000	0	2,000
Landscape Utilities	7,680	0	7,680
City Landscape Services	11,250	0	11,250
Other Maintenance Services	3,150	0	3,150
Total Annual Direct Costs	\$89,080	(\$2,250)	\$86,830
CAPITAL EXPENDITURES			
Special Projects	\$13,000	\$0	\$13,000
Total Annual Special Projects	\$13,000	\$0	\$13,000
ADMINISTRATION EXPENSES			
Annual Administration Expenses			
City Annual Administration	\$1,520	\$0	\$1,520
Engineer's Report & Services	5,040	0	5,040
Public Noticing	350	0	350
Total Administration	\$6,910	\$0	\$6,910
TOTAL DIRECT & ADMINISTRATION COSTS	\$108,990	(\$2,250)	\$106,740
CAPITAL RESERVE COLLECTIONS/(USES)			
Landscape Rehabilitation/Replacement	\$3,128	\$0	\$3,128
Median Rehabilitation/Replacement	138	0	138
Open Space Rehabilitation/Replacement	1,000	(250)	750
Tree Rehabilitation/Replacement	(7,194)	0	(7,194)
Slope Rehabilitation/Replacement	3,754	0	3,754
Other Rehabilitation/Replacement	741	0	741
Total Annual Capital Reserve Collections/(Uses)	(\$1,567)	(\$250)	(\$1,317)
LEVY ADJUSTMENTS			
Interest Income - Improvement Fund	(\$2,051)	\$0	(\$2,051)
Interest Income - Operating Reserve Fund	(2,129)	0	(2,129)
Contribution from Other Sources	(2,500)	(2,500)	0
Reserve Collection/(Use)	(27,863)	0	(27,863)
Total Levy Adjustments	(\$34,543)	(\$2,500)	(\$32,043)
BALANCE TO LEVY	\$76,014	\$0	\$76,014
DISTRICT STATISTICS			
Total Parcels			191
Parcels Levied			181
Total EBU ⁽¹⁾			231.75
Levy per EBU			\$328.00
Maximum Levy per EBU			\$2,302.26
FUND BALANCE INFORMATION			
Beginning Operating Reserve Balance			\$61,426
Operational Reserve Interest			2,129
Surplus Transfer from Improvement Fund			30,254
Operational Reserve Collection (Use)			(32,043)
Estimated Ending Operating Reserve Balance			\$61,766
Beginning Improvement Fund Balance			\$90,744
Improvement Fund Interest			2,051
Surplus Transfer to Operations Fund			(30,254)
Improvement Fund Collection/(Use)			1,567
Estimated Ending Improvement Fund Balance			\$64,108

⁽¹⁾ Levy per EBU rate does not include the County of San Luis Obispo fee of \$2.00 per parcel



5. METHOD OF ASSESSMENT

5.1 General

The 1972 Act permits the establishment of assessment districts by agencies for the purpose of providing certain public improvements, which include the construction, maintenance, and servicing of public lights, landscaping and appurtenant facilities. The 1972 Act further requires that the cost of these improvements be levied according to benefit rather than assessed value:

“The net amount to be assessed upon lands within an assessment district may be apportioned by any formula or method which fairly distributes the net amount among all assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements.”

The method of apportionment described in this Report for allocation of special benefit assessments utilizes commonly accepted engineering practices and have been established pursuant to the 1972 Act and the provisions of Article XIIIID. The formulas used for calculating assessments reflects the composition of parcels within the District and the improvements and services provided, to fairly apportion the costs based on the special benefits to each parcel.

5.2 Benefit Analysis

Each of the proposed improvements, the associated costs and assessments have been carefully reviewed, identified and allocated based on special benefit pursuant to the provisions of the 1972 Act and Article XIIIID. The improvements provided by this District and for which properties will be assessed have been identified as necessary, required and/or desired for the orderly development of the properties within the District to their full potential, consistent with the development plans and applicable portions of the City General Plan. As such, these improvements would be necessary and required of individual property owners for the development of such properties and the ongoing operation, servicing and maintenance of these improvements would be the financial obligation of those properties. Therefore, the improvements and the annual costs of ensuring the maintenance and operation of the improvements are a distinct and special benefit to the properties within the District. Any improvement or portion thereof that is considered to be of general benefit shall be funded by other revenue sources and not included as part of the special benefit assessments allocated to properties within the District.

5.2.1 SPECIAL BENEFIT

The method of apportionment (method of assessment) established herein is based on the premise that each assessed parcel within the District receives special benefits from the improvements and the desirability and security of those properties is enhanced by the presence of public lighting and well-maintained landscaping in close proximity to those properties.

The special benefits associated with landscape improvements are specifically:

- Enhanced desirability of properties through association with the improvements.



- Improved aesthetic appeal of properties providing a positive representation of the area and properties.
- Enhanced adaptation of the urban environment within the natural environment from adequate green space and landscaping
- Environmental enhancement through improved erosion resistance, dust and debris control, and fire prevention.
- Increased sense of pride in ownership of property within the District resulting from well-maintained improvements associated with the properties.
- Enhanced quality of life through well-maintained green space and landscaped areas.
- Reduced criminal activity and property-related crimes (especially vandalism) against properties in the District through well-maintained surroundings and amenities including abatement of graffiti.
- Enhanced environmental quality of the parcels by moderating temperatures, providing oxygenation and attenuating noise.

The special benefits of street lighting and other public lighting facilities are the convenience, safety, and security of property, improvements, and goods. Specifically:

- Enhanced deterrence of crime and the aid to police protection.
- Increased nighttime safety on roads, streets and public areas.
- Improved ability of pedestrians and motorists to see.
- Improved ingress and egress to property.
- Reduced vandalism and other criminal act and damage to improvements or property.
- Improved traffic circulation and reduced nighttime accidents and personal property loss.

The preceding special benefits contribute to the esthetic value and desirability of each of the assessed parcels within the District and thereby provide a special enhancement of the properties. Furthermore, it has been determined that the lack of funding to properly service and maintain the District improvements would have a negative impact on the properties within the District.

5.2.2 GENERAL BENEFIT

In reviewing each of the District improvements, the proximity of those improvements to both properties within the District and those outside the District as well as the reasons for installing and constructing such improvements, it is evident that the improvements are solely the result of developing properties within the District and the ongoing maintenance and operation of these improvements will directly affect the properties within the District. Although the improvements include public areas, easements, rights-of-way and other amenities available or visible to the public at large, the construction and installation of these improvements (except portions of the open space areas) were only necessary for the development of properties within the District and were not required nor necessarily desired by any properties or developments outside the District boundary and any public access or use of the improvements by others is incidental. Therefore, it has been determined that the improvements and the ongoing maintenance, servicing and operation of those improvements provide no measurable general benefit to properties outside the District or to the public at large, but clearly provide distinct and special benefits to properties within the District. With respect to the open space areas, these areas are an integral part of property development within the District and clearly provide a direct and special benefit those properties. However, it is

also recognized that the majority of this open space area is located on the perimeter of the District and is directly accessible from surrounding properties and the public at large. Therefore, it has been determined that up to twenty-five percent (25%) of the costs to maintain this area shall be allocated as general benefit and not assessed as part of the District's special benefit assessments

5.3 Assessment Methodology

The method of apportionment for the District calculates the receipt of special benefit from the respective improvements based on the actual or proposed land use of the parcels within the District. The special benefit received by each lot or parcel is equated to the overall land use of parcels within the District based on the parcel's actual land use or proposed development.

The costs associated with the improvements shall be fairly distributed among the parcels based upon the special benefit received by each parcel. Additionally, in compliance with the Article XIID Section 4, each parcel's assessment may not exceed the reasonable cost of the proportional special benefit conferred to that parcel. The benefit formula used to determine the assessment obligation is therefore based upon both the improvements that benefit the parcels within the District as well as the proposed land use of each property as compared to other parcels that benefit from those specific improvements.

To identify and determine the special benefit to be received by each parcel and their proportionate share of the improvement costs it is necessary to consider the entire scope of the planned improvements as well as individual property development within the District. Upon review of the proposed improvements it has been determined that each of the residential parcels within the District receives special benefits from the improvements to be funded by annual assessments and based on the planned property development a single zone of benefit is appropriate for the allocation of the assessments and proportional benefit.

5.3.1 EQUIVALENT BENEFIT UNITS:

To assess benefits equitably it is necessary to relate each property's proportional special benefits to the special benefits of the other properties within the District. The method of apportionment established for most districts formed under the 1972 Act utilizes a weighted method of apportionment known as an Equivalent Benefit Unit methodology that uses the single-family home site as the basic unit of assessment. A single-family home site equals one Equivalent Benefit Unit (EBU) and the other land uses are converted to a weighted EBU based on an assessment formula that equates the property's specific development status, type of development (land use), and size of the property, as compared to a single-family home site.

Although the Equivalent Benefit Unit method of apportioning special benefit is most commonly used and applied to districts that have a wide range of land use classifications (residential and non-residential use), this District is comprised of only residential properties and the following apportionment analysis of special benefit addresses only residential land uses. Not all land use types described in the following are necessarily applicable to the development of properties within this District, but are presented for comparison purposes to support the proportional special benefit applied to those land use types within the District.

5.3.2 EBU APPLICATION BY LAND USE:

- (1) **Single-family Residential** — This land use is defined as a fully subdivided residential home site with or without a structure. This land use is assessed 1.00 EBU per lot or parcel. This is the base value that the other properties are compared and weighted against regarding special benefit (i.e. Equivalent Benefit Unit “EBU”).
- (2) **Multi-family Residential** — This land use is defined as a fully subdivided residential parcel that has more than one residential unit developed on the property. (This land use typically includes apartments, duplexes, triplex etc., but does not generally include condominiums, town-homes or mobile home parks). Based on average population densities and size of the structure as compared to a typical single-family residential unit, multi-family residential parcels shall be proportionately assessed for the parcel’s total number of residential units utilizing a sliding benefit scale. Although multi-family properties typically receive similar benefits to that of a single-family residential, it would not be reasonable to conclude that on a per unit basis, the benefits are equal. Studies have consistently shown that the average multi-family unit impacts infrastructure approximately 75% as much as a single-family residence (Sample Sources: Institute of Transportation Engineers Informational Report Trip Generation, Fifth Edition; Metcalf and Eddy, Wastewater Engineering Treatment, Disposal, Reuse, Third Edition). These various studies indicate that most public improvements and infrastructure are utilized and impacted at reduced levels by multi-family residential units and a similar reduction in proportional benefit is appropriate. Furthermore, it is also reasonable to conclude that as the density (number of units) increases the proportional benefit per unit tends to decline because the unit size and people per unit usually decreases. Based on these considerations and the improvements provided by this District, an appropriate allocation of special benefit for multi-family residential properties as compared to a single-family residential is best represented by the following special benefit assignment: 0.75 EBU per unit for the first 50 units; 0.50 EBU per unit for units 51 through 100; and 0.25 EBU per unit for remaining units.
- (3) **Condominium/Town-home Units** — Condominiums and town-homes tend to share attributes of both single-family residential and multi-family residential properties and for this reason are identified as a separate land use classification. Like most single-family residential properties, these properties are not usually considered rental property and generally, the County assigns each unit a separate APN or assessment number. However, condominiums and town-homes often have similarities to multi-family residential properties in that they are generally zoned medium to high density and in some cases may involve multiple units on a single APN. In consideration of these factors, it has been determined that an appropriate allocation of special benefit for condominiums, town-homes and similar residential properties is best represented by an assignment of 0.75 EBU per unit regardless of whether each unit is assigned an individual APN or there are multiple units assigned to an APN. (There is no adjustment for parcels with more than five units).
- (4) **Planned-Residential Development** — This land use is defined as any property for which a tentative or final tract map has been filed and approved (a specific number of residential lots and units has been identified) and the property is expected to be subdivided within the fiscal year or is part of the overall improvement and development plan for the District. This land use classification often times involves more than a single parcel (e.g. the approved tract map encompasses more than a

single APN). Each parcel that is part of the approved tract map shall be assessed proportionately for the proposed or estimated residential type and units to be developed on that parcel as part of the approved tract map. Accordingly, each parcel is assigned an appropriate number of benefit units that reflects the development of that property at build-out. (The EBU assigned to each parcel shall represent the combination of single-family, condominium, multi-family units to be developed).

(5) Vacant Residential — This land use is defined as property currently zoned for residential development, but a tentative or final tract map for the property has not yet been approved. Based upon the opinions of professional appraisers who appraise market property values for real estate in California, the land value portion of a property typically ranges from 20 to 30 percent of the total value of a developed residential property (the average is about 25 percent). Although the assessed value of an individual property is not a direct reflection of the property's special benefit, this general correlation between land value and structure value does provide a reasonable basis for apportioning special benefit for vacant residential properties. Utilizing this twenty-five percent (25%) apportionment and the number of single-family residential units typically developed per acre of land (an average of 4 residential units per acre) an Equivalent Benefit Unit of 1.00 EBU per acre (4 units per acre x 25%) is derived and presents an appropriate apportionment of special benefit for vacant residential properties. Recognizing that the full and timely utilization of vacant property is reduced as the size of the property increases, it has been determined that the maximum EBU assigned to a vacant residential parcel shall not exceed 25.00 EBU (parcels in excess of 25 acres are assigned 25.00 EBU). Parcels less than one acre, shall be assigned a minimum of 1.00 EBU (similar to a vacant lot within a residential tract).

(6) Exempt Parcels — This land use identifies properties that are not assessed and are assigned 0.00 EBU. This land use classification may include but is not limited to:

- Lots or parcels identified as public streets and other roadways (typically not assigned an APN by the County);
- Dedicated public easements including open space areas, utility rights-of-way, greenbelts, parkways, parks or other publicly owned properties that are part of the District improvements or may provide other benefits to private properties within the District;
- Private properties that cannot be developed independently from an adjacent property, such as common areas, sliver parcels or bifurcated lots or properties with very restrictive development use;

These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment, but shall be reviewed annually by the assessment engineer to confirm the parcels' current development status. Government owned properties or public properties are not necessarily exempt properties and shall be subject to special benefit assessment unless it qualifies for an exempt status.

(7) Special Cases — In many districts where multiple land use classifications are involved, there are usually one or more properties for which the standard land use classifications do not accurately identify the special benefits received from the improvements. For example, a parcel may be identified as a Vacant Residential property, however only a small percentage of the parcel's

total acreage can actually be developed. In this case, an appropriate calculation would be based on the net acreage that can be utilized rather than the gross acreage of the parcel

The following table provides a summary of land use classifications and the Equivalent Benefit Unit calculations previously outlined.

Property Type	Equivalent Benefit Units	Multiplier
Single-family Residential	1.00	Per Unit/Lot/Parcel
Multi-family Residential	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Condominium/Townhome Units	0.75	Per Unit
Planned Residential Development	1.00	Per Planned SF Residential Lot
	0.75	Per Planned Condominium
	0.75	Per Unit for the First 50 Units
	0.50	Per Unit for Units 51-100
	0.25	Per Unit for all Remaining Units
Vacant Residential Land	1.00	Per Acre
Exempt Parcels	0.00	Per Parcel

The following formula is used to calculate each parcel’s EBU (proportional benefit).

$$\text{Parcel Type EBU} \times \text{Acres or Units} = \text{Parcel EBU}$$

The total number of Equivalent Benefit Units (EBU’s) is the sum of the individual EBU's applied to parcels that receive special benefit from the improvements. An assessment amount per EBU (Assessment Rate) for the improvements is established by taking the total cost of the improvements and dividing that amount by the total number of EBU’s of the parcels benefiting from the improvements. This Rate is then applied back to each parcel’s individual EBU to determine the parcel’s proportionate benefit and assessment obligation for the improvements.

$$\text{Total Balance to Levy} / \text{Total EBU} = \text{Levy per EBU}$$

$$\text{Levy per EBU} \times \text{Parcel EBU} = \text{Parcel Levy Amount}$$

5.4 Assessment Range Formula

Any new or increased assessment requires certain noticing and meeting requirements by law. Prior to the passage of Proposition 218 (California Constitution Articles XIII C and XIII D), legislative changes in the Brown Act defined a "new or increased assessment" to exclude certain conditions. These conditions included "any assessment that does not exceed an assessment formula or range of assessments previously adopted by the agency or approved by the voters in the area where the assessment is imposed." This definition and conditions were later confirmed through Senate Bill 919 (Proposition 218 implementing legislation).

The purpose of establishing an Assessment Range Formula is to provide for reasonable increases and inflationary adjustment to annual assessments without requiring costly noticing and mailing procedures, which could add to the District costs and assessments. As part of the District formation, the notice and assessment ballots presented to the property owners for approval included a maximum assessment



amount for Fiscal Year 2005/2006 (initial maximum assessment), identification of the corresponding maximum assessment rate and a summary of the Assessment Range Formula described herein.

The Assessment Range Formula for this District shall be applied to future assessments and is generally defined:

- If the proposed annual assessment (levy per EBU) for the upcoming fiscal year is less than or equal to the adjusted Maximum Assessment Rate, then the proposed annual assessment is not considered an increased assessment.
- The Maximum Assessment Rate is equal to the (Initial) Maximum Assessment Rate established for Fiscal Year 2005/2006 adjusted annually by the greater of, three percent (3%) or the annual percentage change in the Consumer Price Index (CPI) of “All Urban Consumers” for the San Francisco-Oakland-Hayward Area from February to February. The Maximum Assessment rate was increased by 3.000% for Fiscal Year 2024/25.

Beginning with Fiscal Year 2006/2007 and each fiscal year thereafter, the Maximum Assessment Rate has been recalculated and a new Maximum Assessment Rate is established for the fiscal year utilizing the Assessment Range Formula described above. The Maximum Assessment Rate is calculated independent of the District’s annual budget and proposed assessment. The annual percentage change in CPI is based on available data provided by the U.S. Department of Labor; Bureau of Labor Statistics at the time the annual Report is prepared. Should the Bureau of Labor Statistics revise such index or discontinue the preparation of such index, the City shall use the revised index or comparable system as approved by the City Council for determining fluctuations in the cost of living. In January 2018, BLS introduced a new geographic area sample for the CPI. As part of the change the index for this area was renamed from San Francisco-Oakland-San Jose to San Francisco-Oakland-Hayward. The metropolitan area is comprised of Alameda, Contra Costa, Marin, San Francisco and San Mateo Counties in the State of California. This CPI has and will be used in all subsequent reports or until such time there is a revision per the BLS and approval from the City Council.

Any proposed annual assessment (rate per EBU) less than or equal to the calculated (adjusted) Maximum Assessment Rate is not considered an increased assessment, even if the proposed assessment is significantly greater than the assessment applied in the prior fiscal year. Likewise, modifications to the method of apportionment that increase the proportional special benefit assigned to a particular land use classification would be considered an increased assessment. Conversely, reductions in the proportional special benefit assigned to a land use classifications are permitted. Changes in land use or size of an individual property resulting in an assessment increase, is not considered an increased assessment.

To impose a new or increased assessment other than the annual inflationary adjustment provided by the preceding Assessment Range Formula, the City must comply with the provisions of Article XIID Section 4c, that requires a public hearing and certain protest procedures including mailed notice of the public hearing and property owner protest balloting. Property owners through the balloting process must approve a proposed new or increased assessment before such an assessment may be imposed.

6. ASSESSMENT DIAGRAM

The parcels within the Landscaping and Lighting District No. 02 Las Lomas (Woodridge) consist of the lots, parcels and subdivisions of land located in the planned residential development known as Las Lomas (Woodridge), Tract 2525-1. The District covers approximately one hundred and eleven acres (111.20 acres) in the southeast portion of the City of Atascadero.

The following map is based on the District Diagram, the San Luis Obispo County Assessor's Maps and the San Luis Obispo County Assessor's information and identifies the parcels of land within the proposed District, as the same existed at the time the District was formed. The combination of the District Diagram on file with the City Clerk and the Assessment Roll contained in this Report constitute the District Assessment Diagram.



7. ASSESSMENT ROLL

Parcel identification for each lot or parcel within the District is based on the Assessment Diagram presented herein and is based on available parcel maps and property data from the San Luis Obispo County Assessor's Office at the time the Engineer's Report was prepared. A listing of the lots and parcels to be assessed within this District along with the assessment amounts is provided herein.

Non-assessable lots or parcels may include, but are not limited to public streets and other roadways (typically not assigned an APN by the County); dedicated public easements, open space areas, rights-of-way, common areas; landlocked parcels, small parcels vacated by the County, bifurcated lots, and any other property that cannot be developed or has little or no value. These types of parcels are considered to receive little or no benefit from the improvements and are therefore exempted from assessment.

If any parcel submitted for collection is identified by the County Auditor/Controller to be an invalid parcel number for the fiscal year, a corrected parcel number and/or new parcel numbers will be identified and resubmitted to the County Auditor/Controller. The assessment amount to be levied and collected for the resubmitted parcel or parcels shall be based on the method of apportionment and assessment rate described in this Report as approved by the City Council. Therefore, if a single assessor's parcel has a status change in development, other land use change, or subdivides into multiple assessor's parcels, the assessment amounts applied to each of the new assessor's parcels shall be recalculated and applied according to the approved method of apportionment and assessment rate rather than a proportionate share of the original assessment amount.

City of Atascadero
Landscaping & Lighting Maint Dist No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-311-014	9341 DECHADO WAY	MFR	17.77	\$40,911.17	\$5,828.56
045-311-015	9261 LOS OLIVOS CIR	MFR	24.83	57,165.13	8,144.24
045-311-016	9110 CIRUELA WAY	MFR	19.90	45,814.98	6,527.20
045-312-001	9510 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-002	9520 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-003	11400 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-004	11390 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-005	11380 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-006	11370 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-007	11360 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-008	11350 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-009	11340 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-010	11320 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-011	11310 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-012	11305 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-013	11325 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-014	11335 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-015	11355 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-016	11365 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-017	11385 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-018	11395 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-019	11405 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-020	11415 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-021	11425 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-022	11435 ELIANO ST	SFR	1.00	2,302.26	328.00
045-312-023	9400 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-024	9410 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-025	9420 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-026	9430 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-027	9440 CALLE MILANO ST	SFR	1.00	2,302.26	328.00
045-312-028	9450 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-029	9460 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-030	9470 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-031	9480 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-032	9490 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-033	9500 CALLE MILANO	SFR	1.00	2,302.26	328.00
045-312-034	9510 CALLE MILANO RD	SFR	1.00	2,302.26	328.00
045-312-035	9520 CALLE MILANO RD	SFR	1.00	2,302.26	328.00
045-312-036	9535 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-037	9525 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-038	9515 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-039	9505 AZOR LN	SFR	1.00	2,302.26	328.00

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-312-040	9495 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-041	9485 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-042	9475 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-043	9465 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-044	9470 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-045	9480 AZOR RD	SFR	1.00	2,302.26	328.00
045-312-046	9500 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-047	9520 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-048	9530 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-049	9540 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-050	9550 AZOR LN	SFR	1.00	2,302.26	328.00
045-312-051	9515 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-052	9505 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-053	9495 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-054	9485 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-055	9475 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-312-056	9500 ALCOTAN RD	SFR	1.00	2,302.26	328.00
045-313-001	11455 MONTE VERDE DR	SFV	1.00	2,302.26	328.00
045-313-002	9500 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-003	9550 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-004	9600 VIA CIELO RD	SFR	1.00	2,302.26	328.00
045-313-005	9650 VIA CIELO RD	SFR	1.00	2,302.26	328.00
045-313-006	9700 VIA CIELO RD	SFR	1.00	2,302.26	328.00
045-313-007	9655 VIA CIELO RD	SFR	1.00	2,302.26	328.00
045-313-008	9625 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-009	9575 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-010	9565 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-011	9555 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-012	9505 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-013	9515 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-014	9525 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-015	9535 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-018	9350 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-019	9402 VIA CIELO LN	SFR	1.00	2,302.26	328.00
045-313-020	9450 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-021	11450 MONTE VERDE	SFR	1.00	2,302.26	328.00
045-313-026	9250 VIA CIELO	SFR	1.00	2,302.26	328.00
045-313-027	9300 VIA CIELO	SFR	1.00	2,302.26	328.00
045-314-001	11290 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-002	11280 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-003	11270 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-004	11260 ELIANO ST	SFR	1.00	2,302.26	328.00

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 2
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APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-314-005	11250 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-006	11240 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-007	11220 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-008	11215 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-009	11225 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-010	11235 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-011	11245 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-012	11255 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-013	11265 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-014	11275 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-015	11285 ELIANO ST	SFR	1.00	2,302.26	328.00
045-314-016	11290 AVION RD	SFR	1.00	2,302.26	328.00
045-314-017	11280 AVION RD	SFR	1.00	2,302.26	328.00
045-314-018	11270 AVION RD	SFR	1.00	2,302.26	328.00
045-314-019	11260 AVION RD	SFR	1.00	2,302.26	328.00
045-314-020	11250 AVION RD	SFR	1.00	2,302.26	328.00
045-314-021	11240 AVION RD	SFR	1.00	2,302.26	328.00
045-314-022	11230 AVION RD	SFR	1.00	2,302.26	328.00
045-314-023	11210 AVION RD	SFR	1.00	2,302.26	328.00
045-314-024	11200 AVION RD	SFR	1.00	2,302.26	328.00
045-314-025	11205 AVION RD	SFR	1.00	2,302.26	328.00
045-314-026	11215 AVION RD	SFR	1.00	2,302.26	328.00
045-314-027	11225 AVION RD	SFR	1.00	2,302.26	328.00
045-314-028	11235 AVION RD	SFR	1.00	2,302.26	328.00
045-314-029	11245 AVION RD	SFR	1.00	2,302.26	328.00
045-314-030	11255 AVION RD	SFR	1.00	2,302.26	328.00
045-314-031	11275 AVION RD	SFR	1.00	2,302.26	328.00
045-314-032	11285 AVION RD	SFR	1.00	2,302.26	328.00
045-314-033	11295 AVION RD	SFR	1.00	2,302.26	328.00
045-315-001	11210 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-002	11190 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-003	11180 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-004	11170 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-005	11160 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-006	11150 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-007	11140 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-008	11130 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-009	11120 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-010	11105 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-011	11115 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-012	11125 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-013	11100 AVION RD	SFR	1.00	2,302.26	328.00

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-315-014	11165 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-015	11185 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-016	11195 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-017	11205 ELIANO ST	SFR	1.00	2,302.26	328.00
045-315-018	11180 AVION RD	SFR	1.00	2,302.26	328.00
045-315-019	11170 AVION RD	SFR	1.00	2,302.26	328.00
045-315-020	11160 AVION RD	SFR	1.00	2,302.26	328.00
045-315-021	11150 AVION RD	SFR	1.00	2,302.26	328.00
045-315-022	11130 AVION RD	SFR	1.00	2,302.26	328.00
045-315-023	11110 AVION RD	SFR	1.00	2,302.26	328.00
045-315-024	11105 AVION RD	SFR	1.00	2,302.26	328.00
045-315-025	11115 AVION RD	SFR	1.00	2,302.26	328.00
045-315-026	11125 AVION RD	SFR	1.00	2,302.26	328.00
045-315-027	11135 AVION RD	SFR	1.00	2,302.26	328.00
045-315-028	11145 AVION RD	SFR	1.00	2,302.26	328.00
045-315-029	11155 AVION RD	SFR	1.00	2,302.26	328.00
045-315-030	11165 AVION RD	SFR	1.00	2,302.26	328.00
045-315-031	11175 AVION RD	SFR	1.00	2,302.26	328.00
045-315-032	11185 AVION RD	SFR	1.00	2,302.26	328.00
045-315-033	11195 AVION RD	SFR	1.00	2,302.26	328.00
045-316-041	9350 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-042	9352 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-043	9354 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-044	9356 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-045	9358 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-046	9360 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-047	9362 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-048	9364 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-049	9366 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-050	9368 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-051	9369 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-052	9367 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-053	9374 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-054	9363 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-055	9361 RIBERENA CIR	CON	0.75	1,726.70	246.00
045-316-056	9355 RANADA CIR	CON	0.75	1,726.70	246.00
045-316-057	9357 RANADA CIR	CON	0.75	1,726.70	246.00
045-316-058	9359 RANADA CIR	CON	0.75	1,726.70	246.00
045-316-059	9361 RANADA CIR	CON	0.75	1,726.70	246.00
045-316-060	9363 RANADA CIR	CON	0.75	1,726.70	246.00
045-316-061	9371 CADENCIA CT	CON	0.75	1,726.70	246.00
045-316-062	9373 CADENCIA CT	CON	0.75	1,726.70	246.00

Slight variances may occur due to rounding

City of Atascadero
Landscaping & Lighting Maint Dist No. 2
Final Billing Detail Report for Fiscal Year 2024/25

APN	Address	Land Use	Benefit Units	Max Assessment	Levy Total
045-316-063	9375 CADENCIA CT	CON	0.75	1,726.70	246.00
045-316-064	9377 CADENCIA CT	CON	0.75	1,726.70	246.00
045-316-065	9379 CADENCIA CT	CON	0.75	1,726.70	246.00
045-316-066	9381 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-067	9383 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-068	9385 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-069	9387 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-070	9389 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-071	9388 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-072	9386 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-073	9384 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-074	9382 CIELO AZUL CT	CON	0.75	1,726.70	246.00
045-316-075	9380 CIELO AZUL CT	CON	0.75	1,726.70	246.00
181 Accounts			231.75		\$76,014.00
181 Total Accounts			231.75		\$76,014.00

Slight variances may occur due to rounding



Atascadero City Council

March 2024

Staff Report - City Treasurer

March 2024 Investment Report

RECOMMENDATION:

Council receive and file the City Treasurer's report for quarter ending March 31, 2024.

REPORT IN BRIEF:

Cash and Investments

Checking	\$ 12,975,755	
Zoo Credit Card Deposit Account	2,302	
Certificates of Deposit	19,379,888	
Government Securities	22,759,207	
Supranational Securities	2,010,109	
Municipal Securities	8,522,424	
LAIF	9,735,873	
Cash with Fiscal Agents	2,466,376	
Cash in Banks at March 31, 2024		\$ 77,851,934
Deposits in Transit		129,976
Timing Differences		(638,045)
Cash and Investments at March 31, 2024		\$ 77,343,865

Investment Activity

Securities Purchased:

<u>Purchase Date</u>	<u>Description</u>	<u>Type</u>	<u>Cost</u>	<u>Maturity Date</u>
01/19/24	Southern Bancorp Bank Arkadelphia, AR	Certificate of Deposit	\$ 249,000	07/20/26
01/19/24	Federal Farm Credit Banks CUSIP #3133EPW84	Government Security	744,497	01/18/29
01/26/24	Old Dominion National Bank North Garden, VA	Certificate of Deposit	249,000	01/26/29
01/26/24	Parkside Financial Bank Clayton, MO	Certificate of Deposit	249,000	01/26/29
02/14/24	Federal Farm Credit Banks CUSIP #3133EP3B9	Government Security	1,241,575	02/13/29

Securities Matured:

<u>Maturity Date</u>	<u>Description</u>	<u>Type</u>	<u>Original Cost</u>	<u>Amount Matured</u>
01/30/24	First Premier Bank Sioux Falls, SD	Certificate of Deposit	\$ 245,000	\$ 245,000
02/22/24	Bank of Delight Delight, AR	Certificate of Deposit	245,000	245,000
03/08/24	Federal Home Loan Bank CUSIP #3130AB3H7	Government Security	742,875	750,000
03/27/24	First National Bank East Lansing, MI	Certificate of Deposit	245,000	245,000

Securities Sold Prior to Maturity:

None

Other Reportable Activities:

None

City of Atascadero
Treasurer's Report
Cash & Investments Activity Summary
for the quarter ending March 31, 2024

	<u>CHECKING ACCOUNTS</u>	<u>INVESTMENTS</u>	<u>FISCAL AGENT</u>	<u>TOTALS</u>
Balance per Banks at January 1, 2024	\$ 12,035,775	\$ 60,988,844	\$ 2,207,103	\$ 75,231,722
Receipts	17,382,983	121,558	29,017	17,533,558
Recognition of Premiums & Discounts	-	49,027	-	49,027
Disbursements	(14,787,345)	-	(175,028)	(14,962,373)
Transfers In	1,485,000	2,733,072	405,284	4,623,356
Transfers Out	<u>(3,138,356)</u>	<u>(1,485,000)</u>	<u>-</u>	<u>(4,623,356)</u>
Balance per Banks at March 31, 2024	<u>\$ 12,978,057</u>	<u>\$ 62,407,501</u>	<u>\$ 2,466,376</u>	77,851,934
Deposits in Transit				129,976
Timing Differences				<u>(638,045)</u>
Adjusted Treasurer's Balance				<u><u>\$ 77,343,865</u></u>

City of Atascadero
Investment Report
March 31, 2024

<u>MATURITY DATE</u>	<u>DESCRIPTION (ISSUER)</u>	<u>PURCHASE DATE</u>	<u>INVESTMENT TYPE</u>	<u>INVESTMENT RATING</u>	<u>STATED % RATE</u>	<u>YIELD</u>	<u>FACE VALUE</u>	<u>PREMIUM/ (DISCOUNT)</u>	<u>COST OF INVESTMENT</u>	<u>MARKET VALUE</u>	<u>UNREALIZED GAIN / (LOSS)</u>
<u>Funds Managed by City</u>											
n/a	Local Agency Invest. Fund (LAIF)	n/a	State Investment Fund	n/a	n/a	4.23%	\$ 9,735,873	n/a	\$ 9,735,873	\$ 9,679,320	\$ (56,553)
n/a	Broker Money Market	n/a	Money Fund	n/a	n/a	Vary	-	n/a	-	-	-
04/26/24	Mainstreet Bank Fairfax, VA	05/01/19	Certificate of Deposit	n/a	2.60%	2.60%	245,000	n/a	245,000	244,459	(541)
05/13/24	Federal Farm Credit Bank CUSIP #3133EKLBO	05/13/19	Government Security	Aaa	2.31%	2.32%	500,000	(4)	499,996	498,355	(1,641)
05/16/24	Enterprise Bank Allison Park, PA	05/16/19	Certificate of Deposit	n/a	2.60%	2.60%	245,000	n/a	245,000	244,074	(926)
06/01/24	Tulare County Pension Bond CUSIP #899154AW8	09/28/20	Municipal Security	A1	3.56%	0.79%	120,000	537	120,537	119,606	(931)
06/13/24	US Treasury Bills CUSIP #912797FS1	09/26/23	Government Security	F-1+ (Aaa equivalent)	0.00%	5.25%	100,000	(1,044)	98,956	98,942	(14)
06/26/24	Commerce Bank Geneva, MN	06/26/19	Certificate of Deposit	n/a	2.30%	2.30%	245,000	n/a	245,000	243,153	(1,847)
07/23/24	BankUnited Miami Lakes, FL	07/24/23	Certificate of Deposit	n/a	5.30%	5.30%	237,000	n/a	237,000	236,827	(173)
07/26/24	Abacus Federal Savings New York, NY	07/26/19	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	242,317	(2,683)
08/01/24	Federal Farm Credit Bank CUSIP 3133EJM55	07/24/19	Government Security	Aaa	3.25%	1.92%	427,000	1,883	428,883	424,327	(4,556)
08/19/24	CF Bank Worthington, OH	08/19/19	Certificate of Deposit	n/a	1.85%	1.85%	245,000	n/a	245,000	241,675	(3,325)
08/28/24	Genoa Banking Company Genoa, OH	08/28/19	Certificate of Deposit	n/a	1.80%	1.80%	245,000	n/a	245,000	241,460	(3,540)
08/28/24	Int'l Bank for Recon & Develop CUSIP #459056HV2	10/18/19	Supranational Security	Aaa	1.50%	1.62%	500,000	(241)	499,759	492,355	(7,404)
08/30/24	Preferred Bank Los Angeles, CA	08/30/19	Certificate of Deposit	n/a	1.85%	1.85%	245,000	n/a	245,000	241,465	(3,535)
09/10/24	Peoples Bank Rock Valley, IA	03/23/20	Certificate of Deposit	n/a	1.50%	1.50%	100,000	n/a	100,000	98,296	(1,704)
09/20/24	Bank Deerfield Deerfield, WI	09/20/19	Certificate of Deposit	n/a	1.70%	1.70%	245,000	n/a	245,000	240,811	(4,190)
09/25/24	Grand River Bank Grandville, MI	03/25/20	Certificate of Deposit	n/a	1.00%	1.00%	245,000	n/a	245,000	239,865	(5,135)

City of Atascadero
Investment Report
March 31, 2024

MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
10/15/24	Federal National Mortgage Assn CUSIP #3135GOW66	03/13/20	Government Security	Aaa	1.63%	0.81%	\$ 500,000	\$ 2,202	\$ 502,202	\$ 490,535	\$ (11,667)
11/08/24	Raymond James Bank St. Petersburg, FL	11/08/19	Certificate of Deposit	n/a	1.80%	1.80%	245,000	n/a	245,000	239,931	(5,069)
11/18/24	Federal Farm Credit Bank CUSIP #3133ENZ94	11/23/22	Government Security	Aaa	4.50%	4.70%	400,000	(515)	399,485	398,220	(1,265)
12/13/24	Federal Home Loan Bank CUSIP #3130A3GE8	03/13/20	Government Security	Aaa	2.75%	0.84%	500,000	6,687	506,687	491,615	(15,072)
01/15/25	Int'l Bank for Recon & Develop CUSIP #459058HT3	01/16/20	Supranational Security	Aaa	1.63%	1.66%	500,000	(153)	499,847	486,195	(13,652)
01/20/25	Live Oak Banking Company Wilmington, NC	01/24/20	Certificate of Deposit	n/a	1.85%	1.85%	245,000	n/a	245,000	238,554	(6,446)
01/24/25	Baycoast Bank Swansea, MA	01/24/20	Certificate of Deposit	n/a	1.70%	1.70%	245,000	n/a	245,000	238,191	(6,809)
02/12/25	Federal Home Loan Mtge Corp CUSIP #3137EAEPO	03/13/20	Government Security	Aaa	1.50%	0.79%	500,000	3,073	503,073	484,555	(18,518)
03/03/25	Federal Farm Credit Bank CUSIP #3133ELQY3	03/04/20	Government Security	Aaa	1.21%	0.88%	500,000	1,498	501,498	482,975	(18,523)
03/26/25	Evergreen Bank Group Oak Brook, IL	03/26/20	Certificate of Deposit	n/a	1.00%	1.00%	245,000	n/a	245,000	235,288	(9,712)
03/27/25	Bank of Romney Romney, WV	03/27/20	Certificate of Deposit	n/a	1.15%	1.15%	245,000	n/a	245,000	235,621	(9,379)
03/27/25	First Jackson Bank Stevenson, AL	03/27/20	Certificate of Deposit	n/a	1.15%	1.15%	245,000	n/a	245,000	235,621	(9,379)
04/01/25	El Cajon Taxable Pension Obl CUSIP 282659AX9	01/27/21	Municipal Security	Aa	1.18%	0.70%	650,000	3,110	653,110	623,331	(29,780)
04/28/25	First National Bank McGregor, TX	04/28/20	Certificate of Deposit	n/a	1.35%	1.35%	245,000	n/a	245,000	235,438	(9,562)
04/29/25	Flagstar Bank Troy, MI	03/26/20	Certificate of Deposit	n/a	1.15%	1.15%	245,000	n/a	245,000	234,950	(10,050)
05/01/25	Corona California Pension CUSIP #21969AAD4	04/12/23	Municipal Security	AA+	1.13%	4.50%	450,000	(15,834)	434,166	430,394	(3,773)
05/15/25	Tennessee Valley Authority CUSIP #880591EW8	11/09/22	Government Security	Aaa	0.75%	4.77%	205,000	(8,910)	196,090	195,578	(512)
06/24/25	BMO Harris Bank NA Chicago, IL	11/08/23	Certificate of Deposit	n/a	3.20%	3.20%	225,000	(5,315)	219,685	220,043	358

City of Atascadero
Investment Report
March 31, 2024

MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
06/30/25	US Treasury Notes CUSIP #912828XZ8	04/13/22	Government Security	Aaa	2.75%	2.61%	\$ 500,000	\$ 821	\$ 500,821	\$ 487,070	\$ (13,751)
07/01/25	Northern Calif Power Agency CUSIP #664845FN9	04/13/22	Municipal Security	Aa3	2.39%	3.04%	305,000	(2,421)	302,579	294,856	(7,723)
07/01/25	University of California CUSIP #91412GU94	10/22/20	Municipal Security	Aa2	3.06%	0.81%	300,000	8,420	308,420	293,307	(15,113)
08/12/25	Goldman Sachs Bank New York, NY	11/08/23	Certificate of Deposit	n/a	3.05%	5.16%	246,000	(6,778)	239,222	239,658	436
08/18/25	Federal National Mortgage Assn CUSIP #3136G4M75	01/09/22	Government Security	Aaa	0.52%	4.70%	280,000	(15,495)	264,505	263,631	(874)
08/20/25	Northeast Community Bank White Plains, NY	07/19/23	Certificate of Deposit	n/a	0.45%	4.99%	160,000	(9,734)	150,266	150,226	(40)
09/01/25	San Bernardino Successor Agency Swansea, MA	10/22/20	Municipal Security	Aa	4.00%	0.71%	175,000	8,134	183,134	175,964	(7,170)
09/12/25	Federal Home Loan Bank CUSIP #3130A6C70	10/04/22	Government Security	Aaa	2.63%	4.13%	570,000	(11,942)	558,058	552,444	(5,614)
10/01/25	Folsom Cordova School District CUSIP #34440PCN9	11/10/20	Municipal Security	Aa-	3.00%	1.00%	400,000	11,911	411,911	388,948	(22,963)
10/03/25	Investar Bank Baton Rouge, LA	10/04/23	Certificate of Deposit	n/a	5.35%	5.35%	248,000	n/a	248,000	249,389	1,389
11/07/25	Federal National Mortgage Assn CUSIP #3135G06G3	12/14/20	Government Security	Aaa	0.50%	0.42%	500,000	639	500,639	467,365	(33,274)
11/15/25	Tulare Sewer Revenue CUSIP 899124MF5	12/11/20	Municipal Security	Aa	1.46%	0.58%	400,000	5,639	405,639	294,616	(111,023)
12/11/25	BMW Bank North America Salt Lake City, UT	12/11/20	Certificate of Deposit	n/a	0.50%	0.50%	245,000	n/a	245,000	227,487	(17,513)
12/18/25	Third Federal Savings & Loan Cleveland, OH	12/18/20	Certificate of Deposit	n/a	1.46%	1.46%	245,000	n/a	245,000	227,115	(17,885)
12/29/25	American Nat'l Bank Baxter, MN	09/29/23	Certificate of Deposit	n/a	5.00%	5.00%	248,000	n/a	248,000	248,456	456
01/15/26	First Reliance Bank Florence, SC	01/15/21	Certificate of Deposit	n/a	0.30%	0.30%	245,000	n/a	245,000	225,670	(19,331)
01/22/26	ConnectOne Bank Englewood Cliffs, NJ	01/22/21	Certificate of Deposit	n/a	0.45%	0.45%	245,000	n/a	245,000	226,128	(18,872)
01/22/26	Luana Savings Bank Luana, IA	01/22/21	Certificate of Deposit	n/a	0.40%	0.40%	245,000	n/a	245,000	226,064	(18,936)

City of Atascadero
Investment Report
March 31, 2024

MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
02/09/26	First United Bank & Trust Durant, OK	03/16/23	Certificate of Deposit	n/a	4.25%	4.81%	\$ 120,000	\$ (1,196)	\$ 118,804	\$ 118,670	\$ (134)
02/11/26	Ind'l & Com'l Bank of China New York, NY	02/22/21	Certificate of Deposit	n/a	0.45%	0.45%	245,000	n/a	245,000	225,785	(19,215)
02/24/26	Eaglebank Bethesda, MD	03/16/23	Certificate of Deposit	n/a	4.25%	4.25%	244,000	n/a	244,000	241,240	(2,760)
03/02/26	Federal Farm Credit Bank CUSIP #3133EFH91	03/03/21	Government Security	Aaa	2.22%	0.75%	876,000	24,496	900,496	836,668	(63,828)
03/27/26	Federal Agriculture Mtge Corp CUSIP #31422XD7	03/30/21	Government Security	n/a	0.83%	0.87%	500,000	(375)	499,625	463,490	(36,135)
04/23/26	Malaga Bank Palos Verdes Peninsula, CA	04/23/21	Certificate of Deposit	n/a	0.55%	0.55%	245,000	n/a	245,000	224,381	(20,619)
04/24/26	Federal National Mortgage Assn CUSIP #3135G0K36	04/26/21	Government Security	Aaa	2.13%	0.77%	500,000	13,879	513,879	475,255	(38,624)
05/19/26	Eaglemark Savings Bank Reno, NV	05/19/21	Certificate of Deposit	n/a	0.70%	0.70%	245,000	n/a	245,000	224,702	(20,298)
05/31/26	US Treasury Notes CUSIP #91282CCF6	11/23/22	Government Security	Aaa	0.75%	4.15%	500,000	(34,845)	465,155	460,645	(4,510)
06/01/26	Golden St TOB CUSIP #38122NC59	05/10/23	Municipal Security	A	2.16%	4.52%	150,000	(7,234)	142,766	140,229	(2,537)
06/05/26	Enterprise Bank Omaha, NE	09/27/23	Certificate of Deposit	n/a	0.85%	4.99%	249,000	(21,282)	227,718	228,594	876
06/24/26	First Financial Bank Dakota Dunes, SD	09/27/23	Certificate of Deposit	n/a	3.15%	5.11%	249,000	(10,274)	238,726	240,317	1,591
06/30/26	UBS Bank USA Salt Lake City, UT	05/19/21	Certificate of Deposit	n/a	0.90%	0.90%	245,000	n/a	245,000	224,682	(20,318)
07/01/26	New York Community Bank Hicksville, NY	06/29/21	Certificate of Deposit	n/a	0.85%	0.85%	245,000	n/a	245,000	224,535	(20,465)
07/20/26	Southern Bancorp Bank Arkadelphia, AR	01/19/24	Certificate of Deposit	n/a	4.00%	4.00%	249,000	n/a	249,000	244,757	(4,243)
07/22/26	Toyota Financial Savings Bank Henderson, NV	07/22/21	Certificate of Deposit	n/a	0.95%	0.95%	245,000	n/a	245,000	224,623	(20,377)
08/01/26	Rancho Adobe Fire Protection CUSIP #752096AE7	10/14/21	Municipal Security	Aa	1.43%	1.25%	260,000	1,075	261,075	240,581	(20,494)
08/03/26	Bridgewater Bank St. Louis Pk, MN	11/03/23	Certificate of Deposit	n/a	5.15%	5.15%	248,000	n/a	248,000	250,076	2,076

City of Atascadero
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MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
08/13/26	Synchrony Bank Draper, UT	08/13/21	Certificate of Deposit	n/a	0.90%	0.90%	\$ 245,000	n/a	\$ 245,000	\$ 223,910	\$ (21,090)
09/24/26	Federal National Mortgage Assn CUSIP #3135G0Q22	09/24/21	Government Security	Aaa	1.88%	0.80%	500,000	13,259	513,259	468,725	(44,534)
09/29/26	First Bank Richmond Richmond, IN	09/29/21	Certificate of Deposit	n/a	0.55%	0.55%	245,000	n/a	245,000	221,066	(23,934)
10/01/26	California Infrastructure Bonds CUSIP #13034AL73	10/05/22	Municipal Security	AAA	1.04%	4.69%	155,000	(13,237)	141,763	141,830	67
10/01/26	Manteca Redevelopment Bonds CUSIP #56453RBA1	10/05/22	Municipal Security	AA	2.04%	4.81%	115,000	(7,428)	107,572	107,025	(547)
10/13/26	Federal Agricultural Mtge Corp CUSIP #31424WAN2	11/08/23	Government Security	n/a	5.00%	4.77%	700,000	3,775	703,775	706,062	2,287
10/31/26	US Treasury Notes CUSIP #912828YQ7	11/23/22	Government Security	Aaa	1.63%	4.07%	250,000	(14,855)	235,145	232,705	(2,440)
11/17/26	Capital One Bank Glen Allen, VA	11/17/21	Certificate of Deposit	n/a	1.10%	1.10%	245,000	n/a	245,000	223,300	(21,700)
11/17/26	Capital One National McLean, VA	11/17/21	Certificate of Deposit	n/a	1.10%	1.10%	245,000	n/a	245,000	223,300	(21,700)
11/17/26	Federal Agricultural Mtge Corp CUSIP #31422XP55	09/27/23	Government Security	n/a	1.15%	4.86%	500,000	(45,295)	454,705	457,660	2,955
12/21/26	Federal Home Loan Bank CUSIP #3130AQF65	12/30/21	Government Security	Aaa	1.25%	1.26%	500,000	(99)	499,901	458,995	(40,906)
12/28/26	Federal Farm Credit Bank CUSIP #3133EJ4E6	01/18/22	Government Security	Aaa	3.13%	1.58%	200,000	8,258	208,258	192,912	(15,346)
12/31/26	Bank Kremlin Kremlin, OK	12/31/21	Certificate of Deposit	n/a	1.05%	1.05%	245,000	n/a	245,000	222,021	(22,979)
01/15/27	San Joaquin Hills Trans Agency CUSIP # 798111HF0	01/19/22	Municipal Security	A2	2.15%	1.88%	500,000	3,639	503,639	464,230	(39,409)
01/19/27	First Foundation Bank Irvine, CA	10/25/23	Certificate of Deposit	n/a	4.70%	5.05%	230,000	(2,079)	227,921	230,110	2,189
02/10/27	Federal Agriculture Mtge Corp CUSIP #31422XTX0	02/17/22	Government Security	n/a	1.60%	1.96%	550,000	(5,494)	544,506	507,997	(36,510)
02/17/27	Beal Bank USA Las Vegas, NV	02/23/22	Certificate of Deposit	n/a	1.90%	1.90%	245,000	n/a	245,000	226,946	(18,054)
02/23/27	Sallie Mae Bank Salt Lake City, UT	10/13/22	Certificate of Deposit	n/a	2.20%	4.17%	184,000	(9,834)	174,166	171,836	(2,330)

City of Atascadero
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MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
03/01/27	Sonoma Marin Area Rail Transit CUSIP #835588BA1	12/07/22	Municipal Security	AA	1.73%	4.45%	\$ 500,000	\$ (36,826)	\$ 463,174	\$ 459,890	\$ (3,284)
03/12/27	Federal Home Loan Bank CUSIP #3130A3DU5	03/17/22	Government Security	Aaa	3.00%	2.20%	500,000	11,356	511,356	480,015	(31,341)
03/16/27	American Express Nat'l Bank Sandy, UT	03/16/22	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	227,166	(17,834)
03/17/27	Beal Bank Plano, TX	03/23/22	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	226,160	(18,841)
04/14/27	Comenity Capital Bank Draper, UT	04/14/22	Certificate of Deposit	n/a	2.65%	2.65%	245,000	n/a	245,000	231,312	(13,688)
04/30/27	US Treasury Notes CUSIP # 91282CEN7	01/18/23	Government Security	Aaa	2.75%	3.64%	1,000,000	(25,802)	974,198	952,270	(21,928)
05/01/27	LA Unified School District CUSIP # 544646A77	05/11/22	Municipal Security	Aa3	5.72%	3.81%	500,000	27,667	527,667	508,190	(19,477)
05/15/27	US Treasury Notes CUSIP #912828X88	05/24/22	Government Security	Aaa	2.38%	2.87%	500,000	(7,236)	492,764	470,510	(22,254)
06/09/27	Federal Home Loan Bank CUSIP #3130A5JU4	06/22/22	Government Security	Aaa	3.04%	3.43%	200,000	(2,310)	197,690	191,646	(6,044)
06/11/27	Federal Home Loan Bank CUSIP #3130ASGU7	06/22/22	Government Security	Aaa	3.50%	3.41%	200,000	577	200,577	194,618	(5,959)
06/15/27	Federal Farm Credit Bank CUSIP #3133EHNRO	06/22/22	Government Security	Aaa	2.58%	3.43%	480,000	(12,225)	467,775	453,197	(14,578)
07/01/27	Sequoia CA Union High CUSIP #817409N50	05/10/23	Municipal Security	AA1	1.95%	4.20%	350,000	(23,659)	326,341	323,645	(2,696)
07/16/27	Federal Farm Credit Bank CUSIP #3133EAXTO	07/26/22	Government Security	Aaa	2.75%	2.98%	135,000	(957)	134,043	127,976	(6,067)
07/20/27	Federal Farm Credit Bank CUSIP #3133ELV92	10/25/23	Government Security	Aaa	0.77%	4.86%	500,000	(61,654)	438,346	443,835	5,489
08/01/27	Corona Norco Ca Unif Sch Dist CUSIP # 2197645B4	08/04/22	Municipal Security	AA-	2.30%	3.63%	250,000	(10,365)	239,635	231,983	(7,653)
08/01/27	Escondido CA Unif Sch Dist CUSIP # 2963871UV7	08/05/22	Municipal Security	AA2	1.13%	3.53%	100,000	(7,481)	92,519	89,522	(2,997)
08/01/27	Martinez CA Uni Sch Dist CUSIP # 573428MN6	08/04/22	Municipal Security	AA	1.26%	3.43%	250,000	(16,926)	233,074	224,440	(8,634)
08/01/27	San Marcos CA Uni Sch Dist CUSIP # 798755GC2	08/05/22	Municipal Security	AA	2.31%	3.68%	185,000	(7,868)	177,132	172,028	(5,104)

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<u>MATURITY DATE</u>	<u>DESCRIPTION (ISSUER)</u>	<u>PURCHASE DATE</u>	<u>INVESTMENT TYPE</u>	<u>INVESTMENT RATING</u>	<u>STATED % RATE</u>	<u>YIELD</u>	<u>FACE VALUE</u>	<u>PREMIUM/ (DISCOUNT)</u>	<u>COST OF INVESTMENT</u>	<u>MARKET VALUE</u>	<u>UNREALIZED GAIN / (LOSS)</u>
08/01/27	Southwestern Comm College CUSIP # 845389LS2	08/04/22	Municipal Security	AA-	1.53%	3.53%	\$ 155,000	\$ (9,652)	\$ 145,348	\$ 141,103	\$ (4,245)
08/26/27	Federal Agriculture Mtge Corp CUSIP #31422XF23	09/02/22	Government Security	n/a	3.20%	3.49%	500,000	(4,610)	495,390	480,245	(15,145)
09/15/27	Luminate Bank Minnetonka, MN	09/15/22	Certificate of Deposit	n/a	3.40%	3.40%	245,000	n/a	245,000	236,383	(8,617)
09/15/27	Ponce de Leon Fed Bank Bronx, NY	09/15/22	Certificate of Deposit	n/a	3.50%	3.50%	245,000	n/a	245,000	237,167	(7,833)
09/15/27	University of Pittsburgh CUSIP # 798755GC2	09/15/22	Municipal Security	AA+	3.18%	3.81%	500,000	(10,125)	489,875	479,020	(10,855)
10/08/27	Federal National Mortgage Assn CUSIP #3135G05Y5	10/12/22	Government Security	Aaa	0.75%	4.12%	1,000,000	(109,486)	890,514	881,590	(8,924)
10/31/27	US Treasury Notes CUSIP # 91282CAU5	11/09/22	Government Security	Aaa	0.50%	4.31%	600,000	(75,254)	524,746	523,944	(802)
11/15/27	Tulare CA Sewer Rev CUSIP #899124MH1	04/12/23	Municipal Security	AA	1.93%	4.47%	325,000	(27,364)	297,636	465,080	167,444
11/15/27	US Treasury Notes CUSIP # 9128283F5	12/07/22	Government Security	Aaa	2.25%	3.79%	500,000	(25,814)	474,186	377,364	(96,822)
12/01/27	Federal Agricultural Mtge Corp CUSIP #31422XR95	10/20/23	Government Security	n/a	4.03%	5.04%	500,000	(16,713)	483,287	492,815	9,528
12/15/27	Forbright Bank Potomac, MD	12/15/22	Certificate of Deposit	n/a	4.00%	4.00%	245,000	n/a	245,000	241,430	(3,570)
12/16/27	Community West Bank NA Goleta, CA	12/16/22	Certificate of Deposit	n/a	4.00%	4.00%	245,000	n/a	245,000	241,435	(3,565)
01/12/28	Inter-American Dev Bank CUSIP # 4581X0EH7	01/19/23	Supranational Security	Aaa	4.00%	3.70%	1,000,000	10,503	1,010,503	984,310	(26,193)
02/10/28	First National Bk of Michigan Kalamazoo, MI	02/10/23	Certificate of Deposit	n/a	3.70%	3.70%	249,000	n/a	249,000	242,979	(6,021)
02/15/28	Belmont Bank & Trust Chicago, IL	02/15/23	Certificate of Deposit	n/a	3.75%	3.75%	249,000	n/a	249,000	243,440	(5,560)
02/15/28	US Treasury Notes CUSIP # 9128283W8	02/01/23	Government Security	Aaa	2.75%	3.64%	500,000	(16,024)	483,976	471,990	(11,986)
02/17/28	Vision Bank St. Louis, MN	02/17/23	Certificate of Deposit	n/a	3.75%	3.75%	249,000	n/a	249,000	243,445	(5,555)
03/10/28	Federal Home Loan Bank CUSIP # 3130ATS57	03/15/23	Government Security	Aaa	4.50%	3.90%	600,000	13,109	613,109	602,568	(10,541)

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MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
03/17/28	Affinity Bank Covington, GA	03/17/23	Certificate of Deposit	n/a	4.90%	4.90%	\$ 245,000	n/a	\$ 245,000	\$ 249,883	\$ 4,883
03/20/28	Bank Five Nine Oconomowoc, WI	03/20/23	Certificate of Deposit	n/a	4.65%	4.65%	245,000	n/a	245,000	247,680	2,680
04/01/28	California State Bonds-GO CUSIP #13063DGC6	04/12/23	Municipal Security	AA	3.50%	3.98%	525,000	(9,157)	515,843	507,880	(7,963)
04/01/28	California State Bonds-Taxable CUSIP #13063DGC6	04/12/23	Municipal Security	AA	3.50%	3.98%	150,000	(2,616)	147,384	145,109	(2,276)
04/06/28	Morgan Stanley Bank Salt Lake City, UT	09/28/23	Certificate of Deposit	n/a	4.65%	4.69%	244,000	(342)	243,658	246,672	3,014
05/12/28	Central Bank Little Rock, AR	05/12/23	Certificate of Deposit	n/a	3.85%	3.85%	249,000	n/a	249,000	245,828	(3,172)
05/16/28	CIBC Bank Chicago, IL	05/16/23	Certificate of Deposit	n/a	4.35%	4.35%	244,000	n/a	244,000	244,073	73
05/16/28	Univest Bank & Trust Souderton, PA	05/16/23	Certificate of Deposit	n/a	4.40%	4.40%	249,000	n/a	249,000	249,588	588
05/30/28	Idaho First Bank McCall, ID	05/30/23	Certificate of Deposit	n/a	4.20%	4.20%	245,000	n/a	245,000	251,858	6,858
05/31/28	Customers Bank Phoenixville, PA	05/31/23	Certificate of Deposit	n/a	4.45%	4.45%	244,000	n/a	244,000	250,654	6,654
06/09/28	Federal Home Loan Bank CUSIP #3130AEB25	06/20/23	Government Security	AA+	3.25%	4.03%	170,000	(5,047)	164,953	163,214	(1,739)
06/30/28	Federal Home Loan Bank CUSIP #3130AWN63	08/03/23	Government Security	Aaa	4.00%	4.33%	500,000	(6,324)	493,676	496,215	2,539
07/06/28	HSBC Bank USA McLean, VA	07/18/23	Certificate of Deposit	n/a	3.30%	4.57%	249,000	(12,276)	236,724	238,380	1,656
07/26/28	Park State Bank Duluth, MN	07/26/23	Certificate of Deposit	n/a	4.45%	4.45%	249,000	n/a	249,000	250,198	1,198
07/31/28	Medallion Bank Salt Lake City, UT	07/31/23	Certificate of Deposit	n/a	4.40%	4.40%	249,000	n/a	249,000	249,717	717
08/01/28	New York City Transitional Fin Auth CUSIP #64971XBN7	08/16/23	Municipal Security	Aa1	4.90%	4.90%	850,000	(57,608)	792,392	802,902	10,510
08/17/28	United Fidelity Bank FBS Evansville, IN	09/13/23	Certificate of Deposit	n/a	4.50%	4.50%	249,000	n/a	249,000	250,741	1,741
09/05/28	Discover Bank Greenwood, DE	09/07/23	Certificate of Deposit	n/a	4.55%	4.55%	244,000	n/a	244,000	246,230	2,230

City of Atascadero
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09/13/28	Optum Bank Inc Draper, UT	09/13/23	Certificate of Deposit	n/a	4.55%	4.55%	\$ 244,000	n/a	\$ 244,000	\$ 246,150	\$ 2,150
09/21/28	Merrick Bank South Jordan, UT	09/21/23	Certificate of Deposit	n/a	4.50%	4.50%	249,000	n/a	249,000	250,823	1,823
09/27/28	Legacy Bank & Trust Mountain Grove, MO	09/27/23	Certificate of Deposit	n/a	4.50%	4.50%	249,000	n/a	249,000	250,838	1,838
09/29/28	Star Bank Maple Lake, MN	09/29/23	Certificate of Deposit	n/a	4.65%	4.65%	244,000	n/a	244,000	247,240	3,240
10/17/28	Southern First Bank Greenville, SC	10/26/23	Certificate of Deposit	n/a	4.85%	4.85%	244,000	n/a	244,000	250,061	6,061
10/23/28	Federal Home Loan Bank CUSIP #3130AXLQ9	10/25/23	Government Security	Aaa	5.03%	4.89%	500,000	2,785	502,785	515,105	12,320
10/27/28	Iowa State Bank Clarksville, IA	10/27/23	Certificate of Deposit	n/a	4.70%	4.70%	249,000	n/a	249,000	252,977	3,977
11/14/28	Wells Fargo Bank Sioux Falls, SD	11/14/23	Certificate of Deposit	n/a	5.05%	5.05%	248,000	n/a	248,000	255,658	7,658
11/16/28	Federal Home Loan Bank CUSIP #3130AFFX0	12/12/23	Government Security	Aaa	3.25%	4.29%	500,000	(21,582)	478,418	478,360	(58)
12/01/28	Sulphur Springs CA Uni Sch District CUSIP #865485EL6	12/07/23	Municipal Security	A2	1.97%	4.58%	110,000	(11,908)	98,092	97,279	(814)
12/04/28	Federal Agricultural Mtge Corp CUSIP #31424WCR1	12/12/23	Government Security	n/a	4.38%	4.33%	750,000	1,336	751,336	752,903	1,567
01/18/29	Federal Farm Credit Bank CUSIP #3133EPW84	01/19/24	Government Security	AA+	3.88%	4.04%	750,000	(5,295)	744,705	737,010	(7,695)
01/26/29	Old Dominion National Bank North Garden, VA	01/26/24	Certificate of Deposit	n/a	3.85%	3.85%	249,000	n/a	249,000	244,092	(4,908)
01/26/29	Parkside Financial Bank Clayton, MO	01/26/24	Certificate of Deposit	n/a	3.85%	3.85%	249,000	n/a	249,000	244,092	(4,908)
02/13/29	Federal Farm Credit Bank CUSIP #3133EP3B9	02/14/24	Government Security	AA+	4.13%	4.28%	1,250,000	(8,221)	1,241,779	1,242,388	609
Total Funds Managed by the City							<u>63,117,873</u>	<u>(710,372)</u>	<u>62,407,501</u>	<u>61,029,099</u>	<u>(1,378,402)</u>

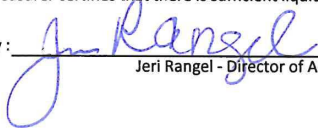
City of Atascadero
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 March 31, 2024

<u>MATURITY DATE</u>	<u>DESCRIPTION (ISSUER)</u>	<u>PURCHASE DATE</u>	<u>INVESTMENT TYPE</u>	<u>INVESTMENT RATING</u>	<u>STATED % RATE</u>	<u>YIELD</u>	<u>FACE VALUE</u>	<u>PREMIUM/ (DISCOUNT)</u>	<u>COST OF INVESTMENT</u>	<u>MARKET VALUE</u>	<u>UNREALIZED GAIN / (LOSS)</u>
<i>Funds Managed by Fiscal Agent</i>											
n/a	BNY Western Trust Hamilton Treas. Money	n/a	Treasury Fund	Aaa	n/a	2.80%	\$ 1,752,600	n/a	\$ 1,752,600	\$ 1,752,600	0
n/a	BNY Western Trust Hamilton Treas. Money	n/a	Treasury Fund	Aaa	n/a	2.80%	713,776	n/a	713,776	713,776	0
<i>Total Funds Managed by Fiscal Agent</i>							<u>2,466,376</u>	<u>n/a</u>	<u>2,466,376</u>	<u>2,466,376</u>	<u>0</u>
							<u>\$ 65,584,249</u>	<u>\$ (710,372)</u>	<u>\$ 64,873,877</u>	<u>\$ 63,495,475</u>	<u>\$ (1,378,402)</u>

Average Maturity of Total Portfolio 857 Days
 Weighted Average Yield of Total Portfolio 3.23%

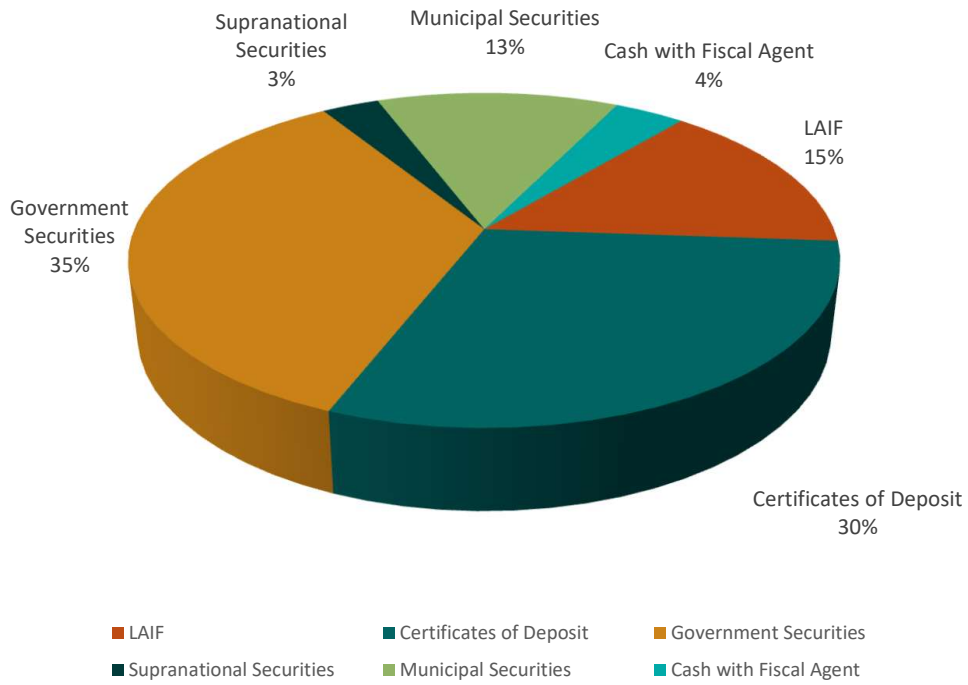
Certification:

It has been verified that this investment portfolio is in conformity with the City of Atascadero's investment policy, which was approved by the City Council on September 8, 2020. The City Treasurer certifies that there is sufficient liquidity to meet the City of Atascadero's estimated future expenditures for a period of six months.

Verified by: 
 Jeri Rangel - Director of Administrative Services

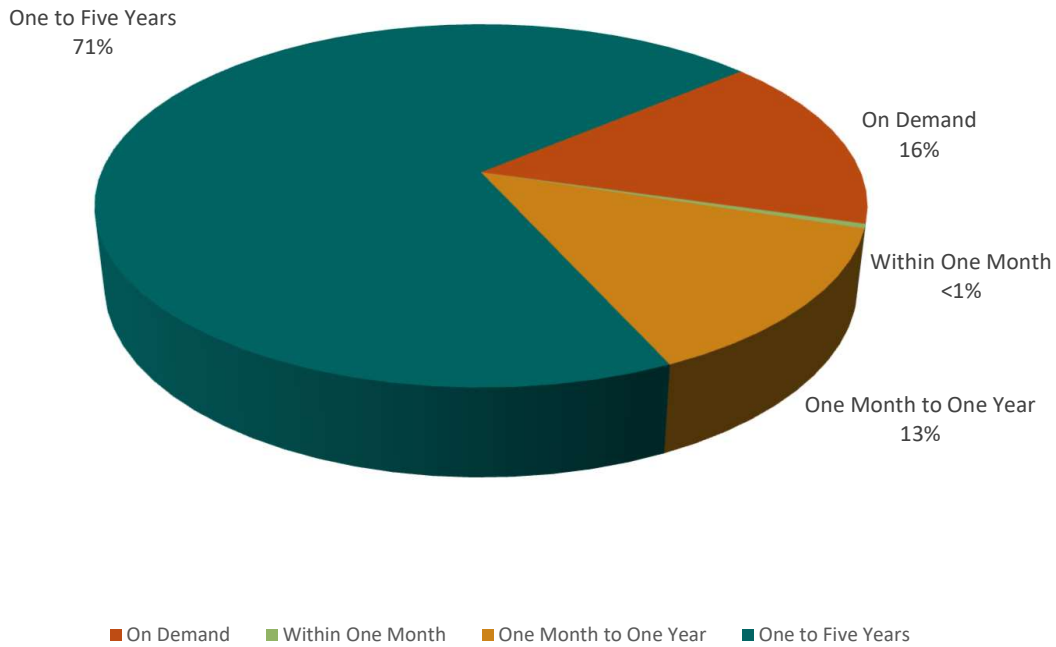
Approved by: 
 Gere Sibbach - City Treasurer

City of Atascadero Investments by Type March 2024



Investment	March 2024
LAIF	\$ 9,735,873
Certificates of Deposit	19,379,888
Government Securities	22,759,207
Supranational Securities	2,010,109
Municipal Securities	8,522,424
Cash with Fiscal Agent	2,466,376
	\$ 64,873,877

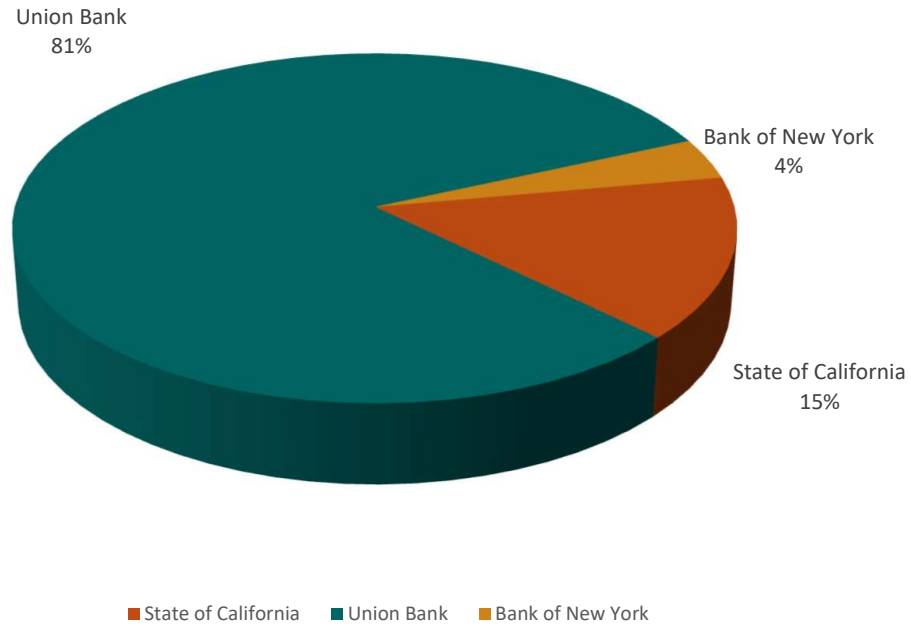
City of Atascadero
Investments by Maturity *
 March 2024



<u>Investment</u>	<u>March 2024</u>
On Demand	\$ 9,735,873
Within One Month	245,000
One Month to One Year	8,327,923
One to Five Years	44,098,705
	<u>\$ 62,407,501</u>

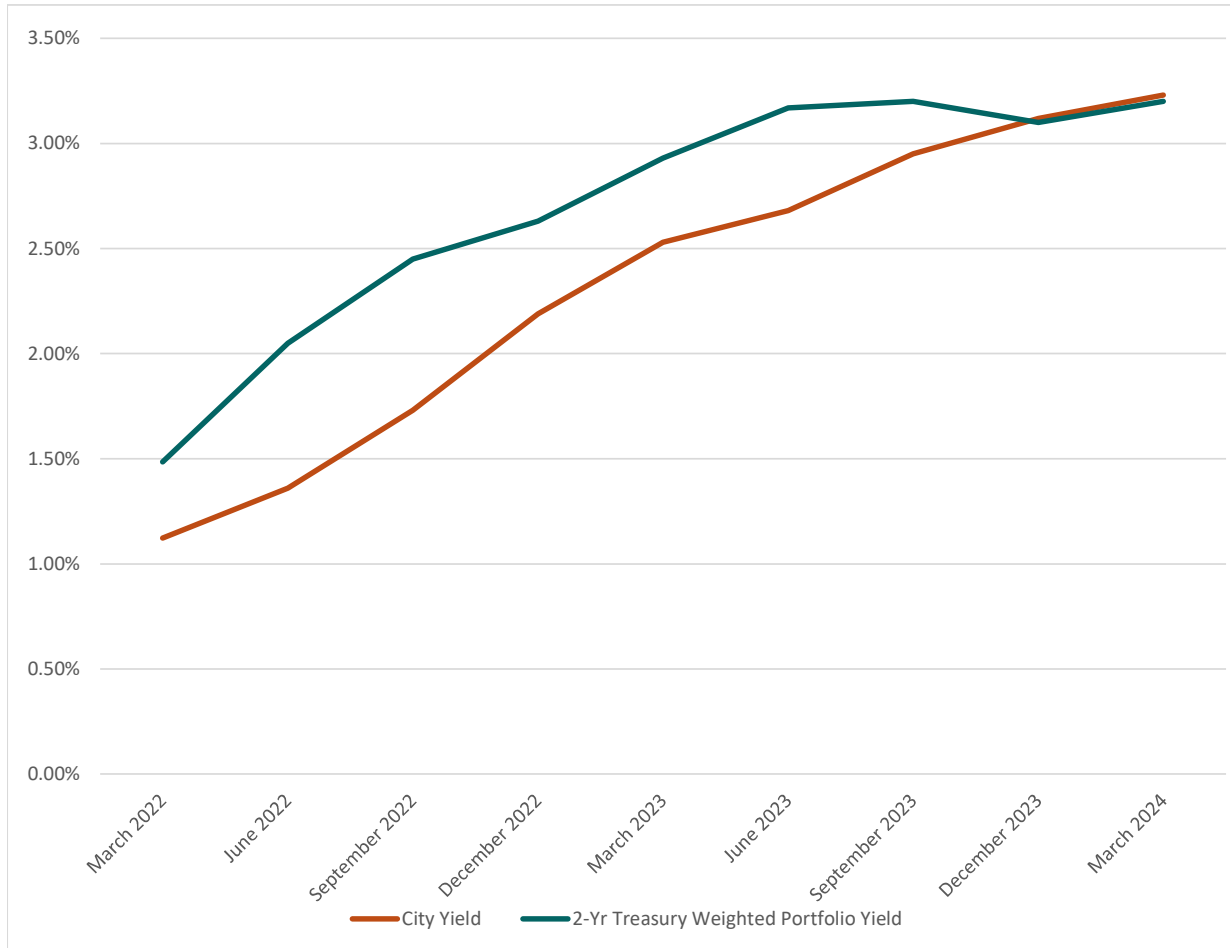
* Cash with fiscal agent is not included in the totals for this graph because the amounts are restricted based on bond covenants, and therefore, the City doesn't retain the option to liquefy these funds at will.

City of Atascadero
Investments by Custodial Agent
 March 2024



Custodial Agent	March 2024
State of California	\$ 9,735,873
Union Bank	52,671,629
Bank of New York	2,466,376
	<u>\$ 64,873,877</u>

City of Atascadero Investment Yield vs. 2-Year Treasury Yield For the Quarter Ended March 31, 2024



	<u>City Yield</u>	<u>2-Yr Treasury Weighted Portfolio Yield</u>
March 2022	1.12%	1.49%
June 2022	1.36%	2.05%
September 2022	1.73%	2.45%
December 2022	2.19%	2.63%
March 2023	2.53%	2.93%
June 2023	2.68%	3.17%
September 2023	2.95%	3.20%
December 2023	3.12%	3.10%
March 2024	3.23%	3.20%



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A7

Department: Community Services & Promotions
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER

FROM: TERRIE BANISH, DIRECTOR COMMUNITY SERVICES & PROMOTIONS

PREPARED BY: TERRIE BANISH, DIRECTOR COMMUNITY SERVICES & PROMOTIONS

SUBJECT: Downtown Parking and Business Improvement Area (DPBIA) Assessment (Intention)

RECOMMENDATIONS:

Council adopt Draft Resolution, declaring intent to levy the annual Downtown Parking and Business Improvement Area assessment, and set a public hearing for June 11, 2024.

DISCUSSION:

The City of Atascadero established a Downtown Parking and Business Improvement Area in 1986 (Chapter 11 of the Atascadero Municipal Code) for the purpose of *acquisition, construction or maintenance of parking facilities, decoration of public places, promotion of public events, and general promotion of business activities in the downtown area*. The formation and operation of a Parking and Business Improvement Area is governed by the California Streets and Highways Code (Section 36500 et. Seq.). The assessment was reduced to \$0.00 in 2010 at the behest of downtown landlords and as part of a program to encourage downtown businesses.

In January 2018, staff was approached by an informal committee of downtown business owners, who expressed interest in reinstating the full levy of the assessment for the Downtown Parking and Business Improvement Area (DPBIA). This committee spent months conducting outreach regarding the DPBIA including holding town hall meetings, sending letters and emails, and personally meeting with businesses subject to the DPBIA in order to garner support to request the Council reinstate the full assessment. The Council reinstated the assessment in June 2018 following a show of support from downtown business owners.

The Streets and Highways Code requires that the “advisory board” provide a report to the City Council annually for the expenditure of funds derived from the assessment paid by businesses in the downtown area. In order to ensure adoption of the assessment prior to the beginning of the

Fiscal Year, the report and Resolution of Intention are submitted as a part of this agenda item. A hearing would then be conducted at the next regular City Council meeting scheduled for June 11, 2024.

The Chamber of Commerce serves as the advisory body and the subcontractor to the City regarding the DPBIA. The informal committee of downtown business owners advises the Chamber of Commerce on expenditures and assists in the creation of the annual budget. The Chamber of Commerce has submitted a report identifying the proposed improvements and activities for the area, based upon the National Main Street Program's four-point approach. The report does not propose any changes to the boundaries of the DPBIA or of the assessment.

The Chamber of Commerce is proposing expenditures for 2024-2025 with the Downtown Parking and Business Improvement Area funds as follows:

	<u>2023-2024</u> <u>ESTIMATED</u>	<u>2024-2025</u> <u>REQUESTED</u>
<u>REVENUES</u>		
BIA Assessments- Received from the City	\$ 13,500	\$ 14,500
Revenue from Events	-	-
Total Revenues	<u>13,500</u>	<u>14,500</u>
<u>EXPENSES</u>		
Events	(1,320)	(4,000)
Beautification / Miscellaneous	(95)	(31,000)
Marketing	(1,890)	(5,000)
Administration	<u>(1,350)</u>	<u>(1,450)</u>
Total Expenses	<u>(4,655)</u>	<u>(41,450)</u>
Net Income	8,845	(26,950)
BEGINNING AVAILABLE BALANCE	<u>27,598</u>	<u>36,443</u>
ENDING AVAILABLE BALANCE	<u>\$ 36,443</u>	<u>\$ 9,493</u>

The proposed expenditures focus on a combination of events and beautification ideas to help promote the downtown and strengthen the businesses in the area. In 2023/2024 the downtown business owners organized Trick-Or-Treat on Entrada and #ATownWithHeart. Downtown kiosk maps were updated twice, and courtesy parking notifications were created to assist with employee parking challenges. In 2024/2025 the Chamber will continue working with downtown business owners to use beautification funds to install string lighting over Entrada Avenue.

An annual Draft Resolution of Intention, declaring the City's intent to levy an annual Downtown Parking and Business Improvement Area assessment and holding a public hearing, is required by the California Streets and Highways Code for the City to levy and collect the assessments. Consistent with State law, the City Council is required to adopt a Draft Resolution of Intention and set a public hearing to receive public comment prior to the assessment being collected.

Staff is proposing that the hearing be conducted at the next regular City Council meeting scheduled for June 11, 2024.

FISCAL IMPACT:

None.

ALTERNATIVES:

1. Council may set an alternative date for the public hearing, but no later than June 25, 2024.
2. Council may discontinue the current program and assess a \$0 fee to businesses in the District.
3. Council may choose not to adopt the Resolution of Intention to levy assessment, thereby discontinuing the collection of Downtown Parking and Business Improvement Area assessments.

REVIEWED BY OTHERS:

This item reviewed by the Administrative Services Director and the Deputy City Manager.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. Draft Resolution
2. Downtown Parking and Business Improvement Area Report and Proposed Expenditures for 2024-2025

DRAFT RESOLUTION

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING THE CITY'S INTENT TO LEVY AN ANNUAL ASSESSMENT PURSUANT TO STREETS AND HIGHWAYS CODE SECTION 36500 ET. SEQ.

WHEREAS, the City of Atascadero has formed a Parking and Business Improvement Area, pursuant to Section 36500 of the Streets and Highways Code of the State of California; and

WHEREAS, the City Council has received a report pursuant to Section 36533 of said Code; and

WHEREAS, the City Council has approved such report and is required to adopt a resolution of intention pursuant to Section 36534; and

WHEREAS, the report proposes no changes to the boundaries or assessment amounts that currently apply in said area; and

WHEREAS, the report identifies the proposed improvements and activities for the area based upon the National Main Street Program Four Points approach, on file in the City Clerk's Office and incorporated herein by this reference.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero:

SECTION 1. The City Council hereby declares its intent to levy and collect assessments within the Parking and Business Improvement Area for Fiscal Year 2024-2025.

SECTION 2. The area is known as the Downtown Parking and Business Improvement Area. The area is generally located in the downtown core including the area between Highway 41 on the south, Rosario Avenue on the north, Highway 101 on the west, and an irregular boundary generally along Santa Ysabel Avenue on the east.

SECTION 3. Consistent with Section 36527 of the Streets and Highways Code, Ordinance No. 116 proposes the following uses of Downtown Parking and Business Improvement Area revenue:

- a. The acquisition, construction, or maintenance of parking facilities for the benefit of the area.
- b. Decoration of public place in the area.
- c. Promotion of public events that are to take place on or in public places in the area.
- d. The general promotion of business activities in the area.

SECTION 4. A report, which includes a full and detailed description of the improvements and activities to be provided in the 2024-2025 fiscal year, the boundaries of the area, and the proposed assessments to be levied upon the businesses within the area, are on file in the City Clerk's Office and incorporated herein by this reference.

SECTION 5. The City Council will hold a public hearing on the levy of the proposed assessment for Fiscal Year 2024-2025 on June 11, 2024, at 6:00 p.m., or sometime shortly thereafter, in the City Council Chambers, 6500 Palma Avenue, Atascadero, California.

SECTION 6. Written or oral protests may be made at the hearing. The form of the protests shall comply with Sections 36524 and ~~36524~~ of the Streets and Highways Code.

SECTION 7. The City Clerk is hereby directed to give notice of the public hearing by causing this Resolution to be published once in a newspaper of general circulation in the City not less than seven days before said hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___ day of May, 2024.

On motion by Council Member _____, and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:
NOES:
ABSENT:
ABSTAINED:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

Exhibit A

Atascadero Chamber of Commerce Downtown Parking and Business Improvement Area Annual Report for Fiscal Year 2024-2025

The California Streets and Highways Code Section 36533 requires the preparation of a report for each fiscal year for which assessments are to be levied and collected to pay the costs of improvements and activities of the Improvement Area. The report may propose changes, including, but not limited to the boundaries of the Parking and Business Improvement Area or any benefit zones within the area, the basis and method of levying the assessments, and any changes in the classification of businesses.

No boundary changes are proposed for Fiscal Year 2024-2025. The boundaries are more specifically described as follows:

From the south corner of Morro Road at the Highway 101 over-crossing then in the generally northwest direction immediately adjacent to Highway 101, to a point at the intersection of El Camino Real and Rosario Avenue, then easterly along Rosario Avenue, to a point at the intersection of Rosario and Palma Avenue, then easterly along Palma Avenue to the rear lot line of parcels on the east side of Traffic Way, then north along said rear lot lines to include Lot 24 of Block LA, of Atascadero, then northerly along the center line of Traffic Way, to a point, then easterly to include the presently existing National Guard Armory Property. Then to a point easterly to the intersection of West Mall and Santa Ysabel Avenue at the West Mall bridge, then southerly along Santa Ysabel Avenue to a point at the intersection of the southerly leg of Hospital Drive and Santa Ysabel Avenue, then easterly from that point to the extension of proposed Highway 41, then southwesterly to the Morro Road/Highway 101 over-crossing, point of beginning.

Since 2000, the City, Community Redevelopment Agency, Chamber of Commerce, other organizations and the community have worked to strengthen the downtown business community, and implement the downtown revitalization strategy. In 2009, as the economic downturn was affecting businesses, the City Council made the decision to levy a \$0 assessment on the businesses in the District. The State of California dissolved all redevelopment agencies in 2011, and the City, Chamber of Commerce, and other organizations have worked in collaboration to continue the efforts of the Community Redevelopment Agency to provide better services to and strengthen the businesses in the downtown.

In 2017, an informal committee of downtown business owners formed to promote economic vitality and encourage business growth in the downtown. This committee will advise the Chamber of Commerce on expenditures and will assist in the creation of the annual budget for the Downtown Parking and Business Improvement Area (DPBIA). The Atascadero Chamber of Commerce will serve as the advisory body and the sub-contractor to the City regarding the Downtown Parking and Business Improvement Area. The Chamber of Commerce is requesting that the City levy an assessment of 100%

of the business license fee for businesses in the DPBIA. Each licensed business in the Improvement Area shall contribute to the assessment. Activities and improvements in the DPBIA are funded by the assessment.

The proposed work plan and budget for Fiscal Year 2024-2025 is as follows:

	<u>2023-2024</u> <u>ESTIMATED</u>	<u>2024-2025</u> <u>REQUESTED</u>
<u>REVENUES</u>		
BIA Assessments- Received from the City	\$ 13,500	\$ 14,500
Revenue from Events	-	-
Total Revenues	<u>13,500</u>	<u>14,500</u>
<u>EXPENSES</u>		
Events	(1,320)	(4,000)
Beautification / Miscellaneous	(95)	(31,000)
Marketing	(1,890)	(5,000)
Administration	<u>(1,350)</u>	<u>(1,450)</u>
Total Expenses	<u>(4,655)</u>	<u>(41,450)</u>
Net Income	8,845	(26,950)
BEGINNING AVAILABLE BALANCE	<u>27,598</u>	<u>36,443</u>
ENDING AVAILABLE BALANCE	<u>\$ 36,443</u>	<u>\$ 9,493</u>

This report shall be filed with the City Clerk on behalf of the DPBIA for Fiscal Year 2024-2025.



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A8

Department: Community Services & Promotions
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER

FROM: TERRIE BANISH, DIRECTOR COMMUNITY SERVICES & PROMOTIONS

PREPARED BY: TERRIE BANISH, DIRECTOR COMMUNITY SERVICES & PROMOTIONS

SUBJECT: Atascadero Tourism Business Improvement District (ATBID) Assessment (Intention)

RECOMMENDATIONS:

Council:

1. Approve the ATBID Annual Report.
2. Adopt Draft Resolution, declaring intent to levy an annual Business Improvement District assessment on lodging businesses within the Atascadero Tourism Business Improvement District, and set a public hearing for June 11, 2024.

DISCUSSION:

The City of Atascadero established the Atascadero Tourism Business Improvement District (ATBID) to levy annual assessments under the Parking and Business Improvement Area Law of 1989, by adopting Title 3, Chapter 16 of the Atascadero Municipal Code in April 2013. The activities to be funded by the assessments, on lodging businesses within the ATBID, are tourism promotions and marketing programs to promote the City as a tourism destination. The formation and operation of a Tourism Business Improvement District is governed by the California Streets and Highways Code (Section 36500 et. Seq.). The budget for the ATBID is submitted in conjunction with the City's annual budget.

The City Council appointed ATBID Advisory Board Members to serve at the pleasure of the Council. The Advisory Board is made up of lodging business owners or employees, or other representatives holding the written consent of a lodging business owner within the ATBID area.

The Streets and Highways Code requires that the Advisory Board provide a specific report to the City Council annually for the expenditure of funds derived from the assessment paid by lodging

businesses within the City. The annual report must identify: (1) proposed activities, programs, and projects for the fiscal year; (2) the approximate cost of such activities, programs and projects for the fiscal year; (3) the amount of surplus or deficit revenues carried over from a previous fiscal year; and (4) contributions received other than assessments. The annual report must meet the requirements of the California Streets and Highways Code §36533. The City Council may approve the report as filed or may modify any particular contained in the report and approve it as modified.

ATBID revenue in fiscal year 2023-24 is expected to be approximately \$427,580, exceeding projected revenue of \$414,120 by \$13,460. In fiscal year 2024-25, revenue is projected to be approximately \$422,400, and expenses are projected to be \$432,470. The ATBID fund balance is projected to be \$725,980 at June 30, 2025.

The Annual Report includes the above assumptions. Staff recommends the Council approve the Annual Report, adopt the Resolution of Intention, and set a date and time for a public hearing. The purpose of the public hearing is to receive public comment prior to the assessment being collected. Staff is proposing that the hearing be conducted at the regular City Council meeting scheduled for June 11, 2024.

FISCAL IMPACT:

None.

ALTERNATIVE:

Council may modify the Annual Report before approval.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. Draft Resolution
2. ATBID Annual Report

DRAFT RESOLUTION

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, DECLARING ITS INTENTION TO LEVY AN ANNUAL ASSESSMENT ON LODGING BUSINESSES WITHIN THE ATASCADERO TOURISM BUSINESS IMPROVEMENT DISTRICT, PURSUANT TO STREETS & HIGHWAYS CODE SECTION 36500 ET SEQ.

WHEREAS, the City of Atascadero (“City”) has formed the Atascadero Tourism Business Improvement District, pursuant to Section ~~32~~36500 of the Streets & Highways Code of the State of California; and

WHEREAS, the City Council has received an annual report pursuant to Section 36533 of said Code; and

WHEREAS, the City Council has approved said report and is required to adopt a resolution of intention pursuant to Section 36534.

NOW, THEREFORE BE IT RESOLVED, by the City Council of the City of Atascadero:

SECTION 1. The City Council hereby declares its intent to levy and collect assessments within the Atascadero Tourism Business Improvement District for Fiscal Year 2024-2025.

SECTION 2. The ATBID includes all of the lodging businesses, including hotels, motels, bed and breakfasts, and each business defined as a “hotel” in Section 3-3.02 of Chapter 3 (Transient Occupancy Tax) of the Atascadero Municipal Code (“Lodging Businesses”) within the corporate boundaries of the City.

SECTION 3. The activities to be funded by the levy of assessments against Lodging Businesses within the ATBID are tourism promotions and marketing programs to promote the City as a tourism destination and projects, programs, and activities that benefit Lodging Businesses located and operating within the boundaries of the ATBID. The proposed activities will primarily be targeted at increasing transient stays at Lodging Businesses.

SECTION 4. The City Council sets June 11, 2024, as the date of the public hearing on the levy of assessments. The public hearing will be held at 6:00 p.m. or as soon thereafter as practicable, in the City of Atascadero Council Chambers, 6500 Palma Ave., Atascadero, California 93422.

SECTION 5. A protest may be made orally or in writing by any owner of a Lodging Business that is within the ATBID boundaries and subject to the ATBID assessment. Written protests must be received by the City Clerk, City of Atascadero, before the close of the public hearing and may be delivered or mailed to the City Clerk, Atascadero, 6500 Palma Ave., Atascadero, California 93422. A written protest may be withdrawn in writing at any time before the conclusion of the public hearing.

SECTION 6. Further information regarding the proposed ATBID may be obtained from the City Manager’s Office, City of Atascadero, 6500 Palma Ave., Atascadero, CA 93422.

SECTION 7. The City Clerk is directed to provide notice of the public hearing on the proposed ATBID by causing this resolution to be published once in a newspaper of general circulation in the City not less than seven days before said hearing.

PASSED AND ADOPTED at a regular meeting of the City Council held on the ___th day of May, 2024.

On motion by Council Member _____ and seconded by Council Member _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:
NOES:
ABSENT:
ADOPTED:

CITY OF ATASCADERO

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

ATBID Annual Report Fiscal Year 2024-2025

(Pursuant to Streets & Highways Code Section 36533)

1. Proposed activities, programs and projects for the fiscal year:
 - Contract Services
 - Marketing Firm
 - Administration Services
 - Marketing Plan
 - Maintenance of Visual Assets
 - Photography & Content
 - Creative Services
 - Digital Marketing
 - Website Content & Updates (i.e., Visit Atascadero; SLO CAL)
 - Social Media
 - Advertising
 - Print & Promotional Items
 - Digital
 - Reactive & Co-op Opportunities
 - Public Relations
 - Group FAM (familiarization tours for journalists, tour operators and meeting & event coordinators)
 - Individual Journalist Hosted Itineraries; Attend conferences.
 - Press Releases
 - Tour & Travel
 - Collaboration with CCTC FAMs
 - Collaboration with Visit CA FAMs
 - Collaboration with SLO CAL FAMs
 - Consumer Outreach
 - Event Sponsorships Opportunities
 - Event Marketing
 - Email Marketing
 - Administration of TBID fund

2. Approximate cost of such activities, programs and projects for the current fiscal year is projected to be \$399,500.

3. Amount of fund balance as of June 30, 2024, is projected to be \$716,260.

4. Estimated fund balance for June 30, 2025, is budgeted at \$725,980.

5. Contributions received other than assessments:
 - Estimated interest income of \$19,400 for fiscal year 2023/24.
 - Estimated interest income for fiscal year 2024/25 is budgeted at \$19,790.



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A9

Department: Police
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER
FROM: DANIEL SUTTLES, CHIEF OF POLICE
PREPARED BY: JEFFREY WILSHUSEN, COMMANDER

SUBJECT: Annual Military Equipment Report Pursuant Assembly Bill 481

RECOMMENDATION:

Council receive and file the annual Military Equipment Report according to the requirements of Assembly Bill 481.

DISCUSSION:

On September 30, 2021, California Assembly Bill 481 (AB 481) was signed into law, which codified California Government Code Sections 7070 to 7075. AB 481 requires law enforcement agencies to obtain approval of, by ordinance at a regular meeting, a military equipment policy related to any funding, acquisition, or use of military equipment. The items considered to be “military equipment” are defined under Government Code Section 7070(c) and include such things as weapons using .50 caliber rounds or greater and flashbang grenades. AB 481 also requires the City Council to annually review and approve any military equipment policy adopted by the ordinance. Any proposed policy must be posted on the City’s website at least 30 days before that annual review and approval.

On June 14, 2022, the City Council adopted Ordinance No. 656 adopting a Military Equipment Policy per AB 481. Pursuant to Ordinance No. 656, staff must return to Council annually to provide a report on the City’s Military Equipment Policy, including the quantity of items possessed, costs, results on any internal audits, and report on any complaints or concerns regarding the use of the equipment.

There are no complaints or concerns received regarding the use of the equipment and it has been determined that there are no violations of the policy. The updated attachment to the Military Equipment Policy details the type of equipment, quantity possessed, and related costs.

FISCAL IMPACT:

None.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. Updated attachment to the Military Equipment Policy
2. Atascadero Police Department's Lexipol Policy

ATASCADERO POLICE DEPARTMENT POLICY MANUAL
ATTACHMENT TO POLICY MANUAL SECTION 708
INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

Equipment Name: 5.56mm Semi-Automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)		
Quantity Owned/Sought: 7 owned		Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifles that fire a 5.56mm projectile.		
Manufacturer Product Description:		
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:		
<ul style="list-style-type: none"> ● Situations where the officer reasonably anticipates an armed encounter. ● When an officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. ● When an officer reasonably believes that a suspect may be wearing body armor. ● When authorized or requested by a supervisor. 		
Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.		
Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.		
Training Required: Officers must complete a CA POST-certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.		

Equipment Name: 5.56mm Semi-automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)		
Quantity Owned/Sought: 17 owned		Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifle capable of firing a 5.56mm projectile.		
Manufacturer Product Description: Bushmaster XM15-E2S Patrolman Rifle. Short-barreled carbine for patrol operations		
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:		
<ul style="list-style-type: none"> ● Situations where the officer reasonably anticipates an armed encounter. ● When an officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. 		

ATASCADERO POLICE DEPARTMENT POLICY MANUAL
ATTACHMENT TO POLICY MANUAL SECTION 708
INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

<ul style="list-style-type: none"> • When an officer reasonably believes that a suspect may be wearing body armor. • When authorized or requested by a supervisor.
Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.
Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.
Training Required: Officers must complete a CA POST-certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.

Equipment Name: 5.56mm Semi-Automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)		
Quantity Owned/Sought: 3 owned		Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifles that fire a 5.56mm projectile.		
Manufacturer Product Description: Heckler and Koch G36C is a compact deployable patrol rifle ideal for compact carry locations such as motor vehicles and motorcycles.		
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:		
<ul style="list-style-type: none"> • Situations where the officer reasonably anticipates an armed encounter. • When an officer is faced with a situation that may require accurate and effective fire at long range. • Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. • When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. • When an officer reasonably believes that a suspect may be wearing body armor. • When authorized or requested by a supervisor. 		
Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.		
Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.		
Training Required: Officers must complete a CA POST-certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.		

Equipment Name: 40 caliber and 9mm Semi-Automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)		
Quantity Owned/Sought: 2 owned		Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifles that fire a 40 caliber and 9mm projectile.		
Manufacturer Product Description: Heckler and Koch MP5 sub-machine gun made to cover a wide variety of different tactical requirements for specialized teams.		

ATASCADERO POLICE DEPARTMENT POLICY MANUAL ATTACHMENT TO POLICY MANUAL SECTION 708 INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

<p>Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:</p> <ul style="list-style-type: none"> ● Situations where the officer reasonably anticipates an armed encounter. ● When an officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. ● When an officer reasonably believes that a suspect may be wearing body armor. ● When authorized or requested by a supervisor.
<p>Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.</p>
<p>Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.</p>
<p>Training Required: Officers must complete a CA POST-certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.</p>

<p>Equipment Name: .308 caliber bolt-action Rifle and Ammunition - CA Govt. Code §7070(c)(10)</p>	
<p>Quantity Owned/Sought: 1 owned</p>	<p>Lifespan: Approximately 15 years</p>
<p>Equipment Capabilities: The Remington 700 Sniper Rifle fires a .308 caliber projectile at extended distances.</p>	
<p>Manufacturer Product Description: The Remington 700 is the number one bolt-action of all time, proudly made in the U.S.A. For over 50 years, more Model 700s have been sold than any other bolt-action rifle before or since. The legendary strength of its 3-rings-of-steel receiver paired with a hammer-forged barrel, combine to yield the most popular bolt-action rifle in history.</p>	
<p>Purpose/Authorized Uses: This rifle is exclusively authorized for use by a sniper-trained SWAT officer, and may be deployed in circumstances where the officer can articulate a reasonable expectation that the rifle may be necessary. Examples of some general guidelines for deploying the rifle may include but are not limited to:</p> <ul style="list-style-type: none"> ● Situations where the officer reasonably anticipates an armed encounter. ● When the officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. 	

ATASCADERO POLICE DEPARTMENT POLICY MANUAL ATTACHMENT TO POLICY MANUAL SECTION 708 INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

<ul style="list-style-type: none"> ● When an officer reasonably believes that a suspect may be wearing body armor. ● When authorized or requested by a supervisor.
<p>Fiscal Impacts: \$1,604.12 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.</p>
<p>Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force including Atascadero Police Department Policy Manual sections 300, 305, 310, 312, 314.7.3.</p>
<p>Training Required: In addition to patrol rifle and standard SWAT Operator training, SWAT Snipers must complete a CA POST-certified sniper course as well as regular SWAT Sniper training and qualifications as required by law and policy.</p>

<p>Equipment Name: .308 caliber bolt-action Rifle and Ammunition - CA Govt. Code §7070(c)(10)</p>	
<p>Quantity Owned/Sought: 1 owned</p>	<p>Lifespan: Approximately 15 years</p>
<p>Equipment Capabilities: The AXSA LE Sniper Rifle fires a .308 caliber projectile at extended distances.</p>	
<p>Manufacturer Product Description: The Accuracy International AX308 rifle is a precision bolt-action rifle designed for accuracy and reliability in various shooting scenarios, including long-range shooting and tactical applications. The rifle is built on a sturdy chassis system constructed from high-grade materials, providing stability and durability. The barrel is equipped with a heavy-profile, match-grade barrel, the AX308 rifle delivers superb accuracy and consistent shot-to-shot performance. The barrel is cold hammer-forged and precision-machined to ensure exceptional quality and longevity.</p>	
<p>Purpose/Authorized Uses: This rifle is exclusively authorized for use by a sniper-trained SWAT officer and may be deployed in circumstances where the officer can articulate a reasonable expectation that the rifle may be necessary. Examples of some general guidelines for deploying the rifle may include but are not limited to:</p> <ul style="list-style-type: none"> ● This bolt action rifle is replacing the aging Remington 700 Sniper Rifle. ● Situations where the officer reasonably anticipates an armed encounter. ● When the officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. ● When an officer reasonably believes that a suspect may be wearing body armor. ● When authorized or requested by a supervisor. 	
<p>Fiscal Impacts: This rifle was purchased and gifted by the San Luis Obispo County Sheriff's Advisor Council. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.</p>	

ATASCADERO POLICE DEPARTMENT POLICY MANUAL ATTACHMENT TO POLICY MANUAL SECTION 708 INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

<p>Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force including Atascadero Police Department Policy Manual sections 300, 305, 310, 312, 314.7.3.</p>
<p>Training Required: In addition to patrol rifle and standard SWAT Operator training, SWAT Snipers must complete a CA POST-certified sniper course as well as regular SWAT Sniper training and qualifications as required by law and policy.</p>

<p>Equipment Name: 40mm Less Lethal Launchers and Kinetic Energy Munitions - CA Govt. Code §7070(c)(14)</p>	
<p>Quantity Owned/Sought: 9 owned</p>	<p>Lifespan: Approximately 15 years</p>
<p>Equipment Capabilities: The 40mm Less Lethal Launcher is capable of firing 40mm Kinetic Energy Munitions.</p>	
<p>Manufacturer Product Description:</p>	
<p>Purpose/Authorized Uses: To compel an individual to cease his/her actions when such munitions present a reasonable option. A verbal warning of the intended use of the device should precede its application. The 40mm Less Lethal Launchers and Kinetic Energy Munitions are intended for use as a “less lethal” use of force option, which serves as an additional option to mitigate the possibility of using lethal force.</p>	
<p>Fiscal Impacts: \$3,400 initial purchase per launcher, \$2,500 initial purchase of 40mm projectiles. The ongoing cost for munitions will vary.</p>	
<p>Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force, primarily Atascadero Police Department Policy Manual sections 300 and 308.</p>	
<p>Training Required: Initial orientation courses including qualifications are provided by Department members who have attended a POST-certified instructor’s course; annual recertification, including qualifications by demonstrated use in a training environment is required of all operators.</p>	

<p>Equipment Name: - .556 AR-15 Patrol Rifles, CA Govt. Code §7070(c)(10)</p>	
<p>Quantity Owned/Sought: 16</p>	<p>Lifespan: 15 years</p>
<p>Equipment Capabilities: Semi-automatic rifle capable of firing a 5.56mm projectile.</p>	
<p>Manufacturer Product Description: 5.56 Sionic AR-15 Patrol Rifles for patrol operations and SWAT Team deployment.</p>	

**ATASCADERO POLICE DEPARTMENT POLICY MANUAL
ATTACHMENT TO POLICY MANUAL SECTION 708
INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT**

Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:

- These Patrol Rifles are replacing the aging Patrol Rifle inventory.
- Situations where the officer reasonably anticipates an armed encounter.
- When an officer is faced with a situation that may require accurate and effective fire at long range.
- Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower.
- When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage.
- When an officer reasonably believes that a suspect may be wearing body armor and when authorized or requested by a supervisor.

These Patrol Rifles are replacing the aging Patrol Rifle inventory.

Fiscal Impacts: The initial cost of equipment is approximately \$2,350 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.

Legal/Procedural Rules Governing Use: All applicable State, Federal, and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force, primarily Atascadero Police Department Policy Manual sections 300 and 308.

Training Required: Officers must complete a CA POST-certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.

Military Equipment

708.1 PURPOSE AND SCOPE

The purpose of this policy is to provide guidelines for the approval, acquisition, and reporting requirements of military equipment (Government Code § 7070; Government Code § 7071; Government Code § 7072).

708.1.1 DEFINITIONS

Definitions related to this policy include (Government Code § 7070):

Governing body – The elected or appointed body that oversees the Department.

Military equipment – Includes but is not limited to the following:

- Unmanned, remotely piloted, powered aerial or ground vehicles.
- Mine-resistant ambush-protected (MRAP) vehicles or armored personnel carriers.
- High mobility multipurpose wheeled vehicles (HMMWV), two-and-one-half-ton trucks, five-ton trucks, or wheeled vehicles that have a breaching or entry apparatus attached.
- Tracked armored vehicles that provide ballistic protection to their occupants.
- Command and control vehicles that are either built or modified to facilitate the operational control and direction of public safety units.
- Weaponized aircraft, vessels, or vehicles of any kind.
- Battering rams, slugs, and breaching apparatuses that are explosive in nature. This does not include a handheld, one-person ram.
- Firearms and ammunition of .50 caliber or greater, excluding standard-issue shotguns and standard-issue shotgun ammunition.
- Specialized firearms and ammunition of less than .50 caliber, including firearms and accessories identified as assault weapons in Penal Code § 30510 and Penal Code § 30515, with the exception of standard-issue firearms.
- Any firearm or firearm accessory that is designed to launch explosive projectiles.
- Noise-flash diversionary devices and explosive breaching tools.
- Munitions containing tear gas or OC, excluding standard, service-issued handheld pepper spray.
- TASER® Shockwave, microwave weapons, water cannons, and long-range acoustic devices (LRADs).
- Kinetic energy weapons and munitions.
- Any other equipment as determined by a governing body or a state agency to require additional oversight.

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Military Equipment

708.2 POLICY

It is the policy of the Atascadero Police Department that members of this department comply with the provisions of Government Code § 7071 with respect to military equipment.

708.3 MILITARY EQUIPMENT COORDINATOR

The Chief of Police should designate a member of this department to act as the military equipment coordinator. The responsibilities of the military equipment coordinator include but are not limited to:

- (a) Acting as liaison to the governing body for matters related to the requirements of this policy.
- (b) Identifying department equipment that qualifies as military equipment in the current possession of the Department, or the equipment the Department intends to acquire that requires approval by the governing body.
- (c) Conducting an inventory of all military equipment at least annually.
- (d) Collaborating with any allied agency that may use military equipment within the jurisdiction of Atascadero Police Department (Government Code § 7071).
- (e) Preparing for, scheduling, and coordinating the annual community engagement meeting to include:
 1. Publicizing the details of the meeting.
 2. Preparing for public questions regarding the department's funding, acquisition, and use of equipment.
- (f) Preparing the annual military equipment report for submission to the Chief of Police and ensuring that the report is made available on the department website (Government Code § 7072).
- (g) Establishing the procedure for a person to register a complaint or concern, or how that person may submit a question about the use of a type of military equipment, and how the Department will respond in a timely manner.

708.4 MILITARY EQUIPMENT INVENTORY

The following constitutes a list of qualifying equipment for the Department:

[See attachment: AB 481 Military Equipment List Attachment A Policy 708.pdf](#)

708.5 APPROVAL

The Chief of Police or the authorized designee shall obtain approval from the governing body by way of an ordinance adopting the military equipment policy. As part of the approval process, the Chief of Police or the authorized designee shall ensure the proposed military equipment policy is submitted to the governing body and is available on the department website at least 30 days prior to any public hearing concerning the military equipment at issue (Government Code § 7071). The military equipment policy must be approved by the governing body prior to engaging in any of the following (Government Code § 7071):

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Military Equipment

- (a) Requesting military equipment made available pursuant to 10 USC § 2576a.
- (b) Seeking funds for military equipment, including but not limited to applying for a grant, soliciting or accepting private, local, state, or federal funds, in-kind donations, or other donations or transfers.
- (c) Acquiring military equipment either permanently or temporarily, including by borrowing or leasing.
- (d) Collaborating with another law enforcement agency in the deployment or other use of military equipment within the jurisdiction of this department.
- (e) Using any new or existing military equipment for a purpose, in a manner, or by a person not previously approved by the governing body.
- (f) Soliciting or responding to a proposal for, or entering into an agreement with, any other person or entity to seek funds for, apply to receive, acquire, use, or collaborate in the use of military equipment.
- (g) Acquiring military equipment through any means not provided above.

708.6 COORDINATION WITH OTHER JURISDICTIONS

Military equipment should not be used by any other law enforcement agency or member in this jurisdiction unless the military equipment is approved for use in accordance with this policy.

708.7 ANNUAL REPORT

Upon approval of a military equipment policy, the Chief of Police or the authorized designee should submit a military equipment report to the governing body for each type of military equipment approved within one year of approval, and annually thereafter for as long as the military equipment is available for use (Government Code § 7072).

The Chief of Police or the authorized designee should also make each annual military equipment report publicly available on the department website for as long as the military equipment is available for use. The report shall include all information required by Government Code § 7072 for the preceding calendar year for each type of military equipment in department inventory.

708.8 COMMUNITY ENGAGEMENT

Within 30 days of submitting and publicly releasing the annual report, the Department shall hold at least one well-publicized and conveniently located community engagement meeting, at which the Department should discuss the report and respond to public questions regarding the funding, acquisition, or use of military equipment.

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Attachments

AB 481 Military Equipment List Attachement A Policy 708.pdf

ATASCADERO POLICE DEPARTMENT POLICY MANUAL
ATTACHMENT TO POLICY MANUAL SECTION 708
INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

Equipment Name: 5.56mm Semi-Automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)	
Quantity Owned/Sought: 7 owned	Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifles that fire a 5.56mm projectile.	
Atascadero	
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:	
<ul style="list-style-type: none"> ● Situations where the officer reasonably anticipates an armed encounter. ● When an officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. ● When an officer reasonably believes that a suspect may be wearing body armor. ● When authorized or requested by a supervisor. 	
Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.	
Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.	
Training Required: Officers must successfully complete a CA POST certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.	

Equipment Name: 5.56mm Semi-automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)	
Quantity Owned/Sought: 17 owned	Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifle capable of firing a 5.56mm projectile.	
Manufacturer Product Description: Bushmaster XM15-E2S Patrolman Rifle. Short barreled carbine for patrol operations	
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:	
<ul style="list-style-type: none"> ● Situations where the officer reasonably anticipates an armed encounter. ● When an officer is faced with a situation that may require accurate and effective fire at long range. ● Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. ● When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. ● When an officer reasonably believes that a suspect may be wearing body armor. 	

ATASCADERO POLICE DEPARTMENT POLICY MANUAL ATTACHMENT TO POLICY MANUAL SECTION 708 INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

<ul style="list-style-type: none"> When authorized or requested by a supervisor.
Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.
Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.
Training Required: Officers must successfully complete a CA POST certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.

Equipment Name: 5.56mm Semi-Automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)	
Quantity Owned/Sought: 3 owned	Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifles that fire a 5.56mm projectile.	
Manufacturer Product Description: Heckler and Koch G36C is a compact deployable patrol rifle ideal for compact carry locations such as motor vehicles and motorcycles.	
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to: <ul style="list-style-type: none"> Situations where the officer reasonably anticipates an armed encounter. When an officer is faced with a situation that may require accurate and effective fire at long range. Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. When an officer reasonably believes that a suspect may be wearing body armor. When authorized or requested by a supervisor. 	
Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.	
Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.	
Training Required: Officers must successfully complete a CA POST certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.	

Equipment Name: 40 caliber and 9mm Semi-Automatic Rifles and Ammunition - CA Govt. Code §7070(c)(10)	
Quantity Owned/Sought: 2 owned	Lifespan: Approximately 15 years
Equipment Capabilities: Semi-automatic rifles that fire a 40 caliber and 9mm projectile.	
Product Description: Heckler and Koch MP5 sub machine gun made to cover a wide variety of different tactical requirements for specialized teams.	
Purpose/Authorized Uses: Officers may deploy the patrol rifle in any circumstance where the officer can articulate a reasonable expectation that the rifle may be needed. Examples of some general guidelines for deploying the patrol rifle may include but are not limited to:	

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<ul style="list-style-type: none"> • Situations where the officer reasonably anticipates an armed encounter. • When an officer is faced with a situation that may require accurate and effective fire at long range. • Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. • When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. • When an officer reasonably believes that a suspect may be wearing body armor. • When authorized or requested by a supervisor.
<p>Fiscal Impacts: The initial cost of equipment is approximately \$1,100 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.</p>
<p>Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force and Firearms including Atascadero Police Department Policy Manual sections: 300, 305, 310, 312, 314.7.3, 433.</p>
<p>Training Required: Officers must successfully complete a CA POST certified 24-hour patrol rifle course as well as regular department firearms training and qualifications as required by law and policy.</p>

<p>Equipment Name: .308 caliber bolt-action Rifle and Ammunition - CA Govt. Code §7070(c)(10)</p>	
<p>Quantity Owned/Sought: 1 owned</p>	<p>Lifespan: Approximately 15 years</p>
<p>Equipment Capabilities: The Remington 700 Sniper Rifle fires a .308 caliber projectile at extended distances.</p>	
<p>Manufacturer Product Description: The Remington 700 is the number one bolt-action of all time, proudly made in the U.S.A. For over 50 years, more Model 700s have been sold than any other bolt-action rifle before or since. The legendary strength of its 3-rings-of-steel receiver paired with a hammer-forged barrel, combine to yield the most popular bolt-action rifle in history.</p>	
<p>Purpose/Authorized Uses: This rifle is exclusively authorized for use by a sniper-trained SWAT officer, and may be deployed in circumstances where the officer can articulate a reasonable expectation that the rifle may be necessary. Examples of some general guidelines for deploying the rifle may include but are not limited to:</p> <ul style="list-style-type: none"> • Situations where the officer reasonably anticipates an armed encounter. • When the officer is faced with a situation that may require accurate and effective fire at long range. • Situations where an officer reasonably expects the need to meet or exceed a suspect's firepower. • When an officer reasonably believes that there may be a need to fire on a barricaded person or a person with a hostage. • When an officer reasonably believes that a suspect may be wearing body armor. • When authorized or requested by a supervisor. 	
<p>Fiscal Impacts: \$1,604.12 per rifle. The ongoing costs for ammunition vary, and maintenance is performed by Department staff.</p>	

ATASCADERO POLICE DEPARTMENT POLICY MANUAL ATTACHMENT TO POLICY MANUAL SECTION 708 INVENTORY LIST OF AB 481 DEFINED MILITARY EQUIPMENT

<p>Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force including Atascadero Police Department Policy Manual sections 300, 305, 310, 312, 314.7.3.</p>
<p>Training Required: In addition to patrol rifle and standard SWAT Operator training, SWAT Snipers must successfully complete a CA POST certified sniper course as well as regular SWAT Sniper training and qualifications as required by law and policy.</p>

<p>Equipment Name: 40mm Less Lethal Launchers and Kinetic Energy Munitions - CA Govt. Code §7070(c)(14)</p>	
<p>Quantity Owned/Sought: 9 owned</p>	<p>Lifespan: Approximately 15 years</p>
<p>Equipment Capabilities: The 40mm Less Lethal Launcher is capable of firing 40mm Kinetic Energy Munitions.</p>	
<p>Manufacturer Product Description:</p>	
<p>Purpose/Authorized Uses: To compel an individual to cease his/her actions when such munitions present a reasonable option. A verbal warning of the intended use of the device should precede its application. The 40mm Less Lethal Launchers and Kinetic Energy Munitions are intended for use as a “less lethal” use of force option, which serves as an additional option to mitigate the possibility of using lethal force.</p>	
<p>Fiscal Impacts: \$3,400 initial purchase per launcher, \$2,500 initial purchase of 40mm projectiles. The ongoing cost for munitions will vary.</p>	
<p>Legal/Procedural Rules Governing Use: All applicable State, Federal and Local laws governing police use of force. Various Atascadero Police Department Policies on Use of Force, primarily Atascadero Police Department Policy Manual sections 300 and 308.</p>	
<p>Training Required: Initial orientation course including qualifications are provided by Department members who have attended a POST-certified instructor’s course; annual recertification, including qualifications by demonstrated use in a training environment are required of all operators.</p>	



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A10

Department: Public Works
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER

FROM: NICK DEBAR, DIRECTOR OF PUBLIC WORKS/CITY ENGINEER

PREPARED BY: RYAN BETZ, PUBLIC WORKS ANALYST/ADA COORDINATOR

SUBJECT: Purchase of CCTV Inspection Vehicle for Wastewater Operations

RECOMMENDATION:

Council approve the purchase of one Envirosight High Definition Rover X CCTV Inspection Vehicle from Haaker Equipment Company for \$274,961 for wastewater collection system maintenance and operations.

DISCUSSION:

The Wastewater Division of Public Works collects and treats wastewater from over 5,500 parcels comprised of residential, commercial, and industrial customers. The sanitary collection system is comprised of 64+ miles of gravity sewer main ranging from 4 to 21 inches in diameter, 1,500 manholes, 12 lift stations, 7 miles of forcemain pipe ranging from 4 to 16 inches in diameter, and 5,600+ lateral connections. While the City has expanded the collection system and replaced and upsized pipes, much of the system is aging including areas in the Downtown that have original sewer pipes from the 1930's.

The California State Water Resources Control Board regulates operation of the City's sanitary collection system and requires pipes to be routinely cleaned, inspected, and maintained. The inspection allows City staff to identify deficiencies and necessary repairs to protect the health and safety of the system, community, and downstream users. Inspections are performed after pipes are cleaned and jetted by the City's sewer truck, and use an advanced camera, mounted on a pipe crawler, that returns high quality images and video in real time to the operator. This enables the operator to examine the pipe for breaks, fractures, infiltration leaks, and accumulated blockages (tree roots, offsets, fats, oils, grease, etc.) and make preventative repairs before an unanticipated sewer discharge occurs in the public right of way. An inspection of the sewer system is also a best practice to perform prior to any street projects to proactively repair pipe deficiencies whereby minimizing costly emergency repairs to new pavements.

To date, the City has hired a third-party contractor to perform sewer inspections, which can cost several hundreds of thousands of dollars for inspecting the City's collection system. Currently, there are no local contractors in the region that perform this type of service, which has led to

higher costs and a backlog of needed inspection and repairs. In addition, this has led to issues during emergency repairs when a pipe blockage or failure needs to be located and cause and appropriate repair identified. Due to the limited number of local contractors, this results in delays for permanent repairs, sometimes lasting days and requiring bypass pumping and constant monitoring by wastewater staff until the repair is performed. Purchasing the CCTV inspection vehicle will allow the City to meet State requirements and enable preventative and emergency repairs to be completed in a more cost effective and timely manner.

The cost to build and deliver a CCTV inspection vehicle is \$274,961. Staff is recommending the use of a cooperative purchasing agreement with Sourcewell to purchase the vehicle. There are many benefits to public agencies to utilize cooperative purchasing agreements. A cooperative purchasing agreement is a commonly used method to purchase vehicles and equipment that have a lower negotiated price, reduction in staff time for preparing a request for proposals, and a contract that is in accordance with the City's purchasing policy.

FISCAL IMPACT:

Approving the recommendation of purchasing the CCTV inspection vehicle will result in the expenditure of \$274,961 of budgeted wastewater funds.

ALTERNATIVES:

The City Council could direct staff to not purchase the CCTV inspection vehicle and continue outsourcing the work to a third-party contractor. Staff does not recommend this alternative since this cost would be approximately \$400,000 on an annual basis. Another alternative is to delay the inspection of the sanitary sewer system. Staff does not recommend this alternative because of State requirements, limited ability to inspect the system during any emergencies and prolonging necessary permanent repairs.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

None.



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A11

Department: Public Works
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER
FROM: NICK DEBAR, DIRECTOR OF PUBLIC WORKS/CITY ENGINEER
PREPARED BY: RYAN HAYES, DEPUTY DIRECTOR OF PUBLIC WORKS

SUBJECT: Update on Local Emergency Proclamation Related to Early February 2024 Storms

RECOMMENDATION:

Council continue the proclamation of the existence of a local emergency related to early February 2024 Storms.

REPORT IN BRIEF:

As a result of a powerful, slow moving, atmospheric river that struck California beginning February 3, 2024, the City Council adopted Resolution No. 2024-002 declaring the existence of a local emergency related to the early February 2024 storms in accordance with the California Emergency Services Act (California Government Code section 8639, 8550, et. seq.) and Atascadero Municipal Code Title 4, Chapter 4. Pursuant to California Government Code 8630(c), the governing body shall review the need for continuing the local emergency at least once every 60 days until the governing body terminates the local emergency. The local emergency proclamation was adopted by City Council on February 13, 2024. A report for continuation of the local emergency was brought to and approved by Council at the April 9, 2024 regular meeting. Continuation of the local emergency is necessary in order to maintain eligibility for Emergency Repair (ER) funding through the Federal Highway Administration (FHWA) for repair of roadway damages and the downhill slope adjacent to San Marcos Road (near 11800 San Marcos Road).

DISCUSSION:

During the early February 2024 storms, a landslide occurred on the downhill slope adjacent to San Marcos Road (near 11800 San Marcos Road) that resulted in destabilization of the roadway and closure of the westbound lane. Due to the proximity of the slope failure to the roadway edge, City public works staff closed the westbound lane of San Marcos Road to traffic for approximately 100' at this location. Additionally, staff requested that a geotechnical engineering firm, Yeh & Associates, assess the site and provide a preliminary stability assessment. Following the site assessment, Yeh & Associates recommended that the lane closure remain in place until the embankment was able to be stabilized.

Concurrent with the evaluation, the City worked with Caltrans Local Assistance staff to submit an Initial Damage Evaluation for this location. After compiling all submitted damages from the February storm event, the County of San Luis Obispo was included in the Governor's Proclamation in the CA 23-4 disaster. Inclusion in the CA 23-4 allows the San Marcos Road Slide to be eligible for funding under the FHWA Emergency Repair program, since San Marcos Road is classified as an on-network FHWA roadway (select collector and arterial class roads). Following the January and March 2023 storm events, two projects were funded through this program, the Del Rio Road Bridge Embankment Stabilization Project, and the San Marcos Road Slope Stabilization Project (approximately ½ mile east of this location).

Due to the roadway instability, the City contracted with Yeh & Associates (Yeh) for geotechnical testing and design recommendations. Yeh completed exploratory soil borings, site evaluation and slope repair recommendations in late April. Due to significant risk to public safety and City facilities, the design and support contracts were awarded on an emergency basis to Yeh and MBS Land Surveys (topographic and boundary survey) in compliance with City Purchasing Policy Section V.2.1b, "Exceptions," for procurement of Professional Services under emergency situations. Engineering design is expected to be completed in early summer, with construction of repairs commencing in late summer 2024. Yeh & Associates contract is for \$49,805 and MBS Land Surveys contract is for \$17,500.

The preliminary geotechnical recommendations provided the basis for final engineering design and construction, with a Reinforced Soil Slope being the recommended alternative. This solution would reconstruct the slope with integrated geogrid reinforcement and geocomposite drainage panels. This preferred alternative was submitted on the Damage Assessment Form (DAF) to Caltrans Local Assistance. The City submitted the DAF in mid-May for available FHWA Emergency Repair (ER) funds. This work is eligible for ER funds since this portion of San Marcos Road is an on-system FHWA roadway. If the DAF is approved for ER funding, up to 100% of the project costs are eligible for reimbursement.

ALTERNATIVES TO THE STAFF RECOMMENDATION:

Council may elect to terminate the emergency proclamation. This is not recommended as it may jeopardize the City's ability to qualify for FHWA Emergency Repair funds.

FISCAL IMPACT:

There is no fiscal impact related to staff's recommendation. Continuation of the local emergency proclamation is necessary in order to qualify for FHWA Emergency Repair funding for the San Marcos Road landslide repairs. Total costs for this project are estimated to be in the range of \$800,000 to \$1,000,000.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

None



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A12

Department: Public Works
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER

FROM: NICK DEBAR, DIRECTOR OF PUBLIC WORKS/CITY ENGINEER

PREPARED BY: RYAN HAYES, DEPUTY DIRECTOR OF PUBLIC WORKS

SUBJECT: El Camino Real Downtown Infrastructure Enhancement Project
Construction Award

RECOMMENDATION:

Council:

1. Award a construction contract to Souza Construction for the Base Bid and Bid Additive Alternate 1 and 4 schedules for a combined total of \$9,490,234 for the El Camino Real Downtown Infrastructure Enhancement Project, Project No. C2017T01 ("Project").
2. Award a professional services contract to Filippin Engineering, Inc. for \$729,718 to perform construction management, inspection, and materials testing services for the Project.
3. Authorize the Director of Administrative Services to allocate an additional \$118,930 in Wastewater Fund Reserves toward the Project for FY2024/25.

REPORT IN BRIEF:

This report provides a brief background for the El Camino Real Downtown Infrastructure Enhancement Project leading up to public bid solicitation for construction proposals. Bid proposals have been received and evaluated by staff for the project, and a bid analysis and recommendations for bid schedules to be included in the contract award are included, along with recommendations for construction management and materials testing awards and project budget adjustments.

DISCUSSION:

BACKGROUND

The El Camino Real Downtown Infrastructure Enhancement Plan ("ECR DT Project") is a culmination of decades of discussion and planning to identify how to best return the downtown core of Atascadero to a vibrant central activity hub. Significant Downtown development has occurred over the last five plus years, and construction of this project is anticipated to accelerate the growth of the downtown economic district.

The ECR DT Project was developed and refined starting with the project initiation in August 2017. Over the following three years, multiple options were considered, with preferred design

alternatives refined through a process of public input, City department review, Council direction, and significant technical analysis, traffic modeling, and safety considerations. The draft alternative concept plan was approved by Council in August 2020.

In October 2021, Wallace Group was selected as the design engineering consultant to perform final design and prepare construction plans, specifications, and cost estimates. After an initial phase of geotechnical testing and topographic survey, the project design team also began preparing for community outreach efforts to solicit value-based input from Council and the community on the blend of “finishing elements” for the project. The intention of this outreach effort was to gather input from multiple corridor users and stakeholders that would provide guidance on the final fixtures and finishes for the project. Following a series of public outreach meetings, the final preferred alternative concept plan was approved by Council in May of 2023.

Since approval of the preferred alternative, the design team has been working to design the various project elements and prepare bidding documents for a public bid process. There have been several plan submittal reviews by City staff, with a focus on the aesthetics, public safety, maintenance sustainability, and value engineering. Of particular importance as the project neared bidding was the splitting out of certain project elements into bid alternatives to provide the best possibility of a project that would meet the overall objectives while fitting within the budget.

It's important to note that the overall objective for the reconstruction of this segment of roadway has been consistent since inception in 2017 - to develop a holistic corridor plan within the Downtown El Camino Real Corridor that considers the needs and goals of all multimodal users, residents, businesses, and City leaders; with the primary goal of improving public safety and a secondary goal of economic development.

PROJECT BID ANALYSIS

The project was publicly bid starting April 5, 2024 for a minimum of 30 days in accordance with State Contracting Laws and Atascadero Purchasing Policy. A public bid opening occurred on May 9, 2024 and two bid proposals were received for \$9,196,554 and \$14,775,451 (for base bid work) with the low bid submitted by Souza Construction, Inc. (Souza) of San Luis Obispo. The bids were reviewed for accuracy and compliance with project bidding requirements, and the City Engineer has determined that Souza is the lowest responsive bidder at \$9,196,554 (Base Bid). The engineer’s estimate of Base Bid probable construction costs was \$9,095,214.

Included in the bid were five bid (additive) alternative schedules. Souza’s price for the five additive alternative bids are as follows:

<u>Bid Add. Schedule</u>	<u>Work Description</u>	<u>Bid Price</u>
Bid Alternate 1:	Additional Concrete Flatwork Replacements	\$ 233,360
Bid Alternate 2:	El Camino Real/Traffic Way Signal and Lighting Modifications	\$ 442,000
Bid Alternate 3:	Site Amenities	\$ 180,321
Bid Alternate 4:	Removable Bollards	\$ 60,320
Bid Alternate 5:	Fiber Optic Infrastructure	\$ 228,605

The bidding documents were written so that the award of the contract would be based upon the lowest Base Bid only. The City has the option of awarding any of the bid alternates at the discretion of Council. Staff recommends that Bid Alternate 1 and 4 be awarded with the Base Bid, as this work will be able to be completed most efficiently and least disruptively as a part of the “linear” nature for project construction, coupled with replacing all the non-ADA compliant driveway approaches and sidewalk throughout the project limits will add significantly to the overall “finished” feel of the project. Bollards will also be difficult to install once El Camino Real is a single lane in each direction and will provide public safety enhancements for the various special events held in the downtown.

Bid Alternate 2 involves replacing and upgrading the traffic signals and lighting at the Traffic Way intersection to improve traffic operations within the corridor, particularly in future buildout conditions, but is not essential to the project at current traffic demand. Staff anticipates pursuing future grant opportunities for traffic signal and lighting improvements at this intersection, whether as a stand-alone project or as part of a larger Traffic Way project, and these improvements are essentially “shovel ready” since design work and construction plans are complete. If Bid Alternate 2 is awarded, additional funds will be needed for the project.

Bid Alternates 3 is not recommended to be awarded at this time and could be added to the project as a change order later in the construction phase if contingency monies are available. While the contractor will not be obligated to hold the pricing provided in the bid if the work is added near completion of the project, given the nature of the work it is not expected that the prices will increase substantially. If Council elects to award these bid alternates at this time, additional funds will be needed for the project. The City plans to add work under Bid Alternative 3 to Phase 2 of the project, which will entail constructing entry signs across El Camino Real on both ends of the corridor. The City was recently awarded \$1 million in Federal earmarks for Phase 2 work as part of a request by Congressman Panetta.

Regarding Bid Alternate 5, City staff is currently in discussions with broadband companies about the opportunity to pay for and own this infrastructure after construction. Design of the dry fiber conduits and vaults were based on recommendations provided by Astound, so if a private company is interested in owning this infrastructure it should be able to be integrated into their facilities easily. It is not recommended that the City construct and own the fiber infrastructure if private companies do not choose to fund this portion of the project, as it would indicate this is not essential for broadband buildout. At the time of this report, City staff had not received confirmation from Astound if they are or are not interested in funding this fiber optic infrastructure.

Overall, Souza’s bid was very close to the engineer’s estimate and is considered very favorable for the scope of work. All recommended project contract work can be completed within the current budget; however, additional funds are recommended to cover contingencies related to sanitary sewer work. Typically, a 20% contingency is provided for City projects, but due to the tight budget constraints, staff is recommending a 10% contingency for sanitary sewer work and 5% for other

non-sanitary sewer work (DIEP) in this project. Although this project does have some unknowns, a significant amount of work was completed during design to identify potential conflicts and a 10% contingency is expected to be sufficient for sanitary sewer construction but will require an additional allocation of \$118,930 from Wastewater Fund Reserves. Current budgeted funds are adequate to cover the 5% DIEP components of the project work. Any contingency remaining at the end of the project will be returned to the account from which it was taken.

CONSTRUCTION MANAGEMENT PROPOSAL ANALYSIS

Staff issued a Request for Proposals (RFP) in March 2024 to solicit professional services from qualified consultants to provide construction engineering and materials testing services for the ECR Downtown Infrastructure Enhancement Project. The scope of services includes full construction management, construction inspection and construction administration services, as well as geotechnical and materials sampling and acceptance testing.

Staff received three proposals from qualified consultants including Filippin Engineering, Cannon Corp. and Vanir. Proposals were individually reviewed and scored by City engineering staff based upon experience with similar projects, responsiveness to City needs, experience of key personnel, and other factors. Of particular importance on this project was the consultant's experience and ability to coordinate and manage work items to limit impacts to traffic, businesses and schools within the downtown core area. All proposals were very good to excellent, but staff determined that Filippin Engineering (Filippin) submitted the most qualified proposal. Filippin's key staff (resident engineer and inspector) live in Atascadero, can respond quickly, and have experience working on similar projects for other public agencies. Additionally, Filippin has proven to be excellent to work with on several recent large City projects, managing these complex projects while keeping them on a tight schedule and budget. In particular, Filippin's proposal demonstrated an excellent understanding and strategy for managing anticipated roadway work and planned lane closures with the contractor, and coordination with City staff on public outreach efforts.

Filippin provided a detailed fee estimate worksheet with their proposal that included labor hours/costs, reimbursable expenses, and subconsultant fees for the work scope identified in the City's RFP. Filippin's fee estimate is \$729,718. Staff reviewed Filippin's fee estimate worksheet and believe the fee is reasonable for full-time construction management, inspection, and materials testing. Typically, full construction engineering services are in the range of 10-15% of construction costs, and Filippin's fee estimate is well below that range. Compensation will be based upon actual hours worked and reimbursable expenses, plus subconsultant fees.

CEQA DETERMINATION

The proposed project is Categorically Exempt (Class 1) from the provisions of the California Environmental Quality Act (California Public Resources Code §§ 21000, et seq., "CEQA") and CEQA Guidelines (Title 14 California Code of Regulations §§ 15000, et seq.) pursuant to CEQA Guidelines Section 15301, because it is limited to repair, maintenance and minor alterations of existing public facilities involving negligible or no expansion of capacity.

ALTERNATIVES TO THE STAFF RECOMMENDATION:

1. Council may direct staff to re-bid this project. Staff does not recommend this option, as the low bid received is very competitive and rebidding the project would not be expected to lower the overall project cost.
2. Council may direct staff to award no bid alternates or include additional bid alternates from the one recommended. If additional bid alternates are awarded, additional funds will be needed for the project.

FISCAL IMPACT:

Approving staff recommendations will result in estimated combined expenditures up to \$10,824,490 from LTF, Circulation System Fund, General Fund, State Legislative Grant, USHA, RSHA, and 2010 Bond Master Agreement Funds for all work not associated with the sanitary sewer replacement; and up to \$1,118,930 in Wastewater Funds for the sanitary sewer replacement work on the project. All expenditures are budgeted except the recommended additional allocation of \$118,930 from Wastewater Fund Reserves. The following tables summarize the estimated project expenditures and funding sources broken down by sanitary sewer replacement (“San. Sewer”) and all other non-sanitary sewer work (“Other”) to complete the project:

ESTIMATED EXPENDITURES			
Description	Other	San. Sewer	Total
Design and Bid Phase	\$ 746,630	\$ 78,370	\$ 825,000
Construction Contract: Base Bid + Bid Alt. 1 & 4	8,615,063	875,171	9,490,234
Const. Contingency: DIEP-5% / San. Sewer-10%	440,667	87,519	528,186
Const. Management / Inspection / Testing (Filippin)	660,400	69,320	729,720
Construction Administration (City staff)	36,200	3,800	40,000
Design Engineer Construction Support (Wallace)	45,250	4,750	50,000
Construction Utility Costs (PG&E and AMWC)	250,000	-	250,000
Survey Monument Perpetuation	30,280	-	30,280
Sum Estimated Expenditures	\$ 10,824,490	\$ 1,118,930	11,943,420

PROPOSED FUNDING			
Description	Other	San. Sewer	Total
Local Transportation Fund: FY23-25 Budget	\$ 138,370	\$ -	\$ 138,370
Circulation System Fund: FY23-25 Budget	87,030	-	87,030
General Fund: FY23-25 Budget	4,694,000	-	4,694,000
State Legislative Grant: FY23-25 Budget (Sen. Laird)	3,000,000	-	3,000,000
USHA Funds: FY23-25 Budget	100,000	-	100,000
RSHA: Betterment Grant Cycle 1 (SLOCOG)	750,000	-	750,000
RSHA: Betterment Grant Cycle 1 Addition (SLOCOG)	800,000		800,000
RSHA: Betterment Grant Cycle 2 (SLOCOG)	1,000,000	-	1,000,000
2010 Bond Master Agreement	255,090	-	255,090
Wastewater Fund: FY23-25 Budget	-	1,000,000	1,000,000
<i>Wastewater Fund Reserve Allocation: FY24/25</i>	-	<i>118,930</i>	<i>118,930</i>
Sum Proposed Funding	\$ 10,824,490	\$ 1,118,930	11,943,420

Net Funding Surplus / (Shortfall)	\$ -	\$ -	\$ -
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REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager


ATTACHMENT(S):

1. Bid Summary

City of Atascadero

Office of the City Clerk

Bid Summary

TO: Public Works
FROM:  Dillon James, Deputy City Clerk
BID NO.: 2024-001
OPENED: 5/9/2024
PROJECT: El Camino Real Downtown Infrastructure Enhancement Project

2

Bids were received and opened today, as follows:

<u>Name of Bidder</u>	<u>Base Bid Total</u>	<u>Add Alternate</u>
Souza Construction	\$9,196,554.00	
		Alt 1: \$233,360.00
		Alt 2: \$442,000.00
		Alt 3: \$180,321.00
		Alt 4: \$60,320.00
		Alt 5: \$228,605.00
Papich Construction Company	\$14,775,451.00	
		Alt 1: \$501,975.00
		Alt 2: \$365,665.00
		Alt 3: \$514,000.00
		Alt 4: \$82,815.00
		Alt 5: \$625,952.00



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item A13

Department: Community Services & Promotions
Date: 5/28/24
Placement: Consent

TO: JAMES R. LEWIS, CITY MANAGER
FROM: TERRIE BANISH, DIRECTOR COMMUNITY SERVICES & PROMOTIONS
PREPARED BY: TERRIE BANISH, DIRECTOR COMMUNITY SERVICES & PROMOTIONS
SUBJECT: Charles Paddock Zoo Funding for AZA Accreditation Budget

RECOMMENDATIONS:

Council authorize the Director of Administrative Services to appropriate \$305,000 in General Fund reserves to the Charles Paddock Zoo's Budget for the Association of Zoos and Aquariums (AZA) accreditation process.

DISCUSSION:

At the Strategic Planning Mid-Year check-in held on April 20, 2024, Council reviewed the importance of accreditation and directed staff to move forward with the accreditation process, including the estimated costs associated with preparing the Charles Paddock Zoo for the accreditation process. Staff presented information about American Zoo Association (AZA) accreditation and the importance of being affiliated with a very prestigious organization, along with the education it provides the community on the importance of the environment, animal welfare, and conservation.

The Charles Paddock Zoo has been an accredited zoological facility for over 30 years, having first achieved accreditation in 1991. This is a huge accomplishment, not only for the Zoo, but also for the City. AZA-accredited zoos are constantly evolving and standards are continuously being raised. Each zoo is required to keep up with these changes. To stay accredited, a zoo must prove they meets these requirements by going through the entire accreditation process every five years. There are currently 236 AZA accredited zoological institutions, (or less than 10%) of the nearly 2,500 worldwide institutions, that exhibit animals to the public. AZA accreditation is the "Gold Standard for Animal Care and Welfare," and it's truly an honor of which the City can be incredibly proud. In the US, there are entire states that do not have even one AZA accredited zoo, and Atascadero is lucky enough to have one.

Having previously been successfully accredited in 2019, the Zoo is once again scheduled for Accreditation by the AZA. The extremely detailed questionnaire application form and all of the accompanying paperwork and backup is due to be submitted to the AZA by September 1, 2024, and staff has already begun the process of reviewing the prior application, backup documentation, and all of the Zoo's policies and procedures to help ensure that the Zoo is continuing to meet, and hopefully exceed, the very stringent requirements for accreditation that have been established and are continually updated by the AZA.

Overseeing this approval process is the AZA Accreditation Commission, a group of 15 experts in zoological operations, animal welfare and husbandry, and veterinary medicine. An AZA inspection team will arrive in early October for a thorough review of the facility and will report their findings back to the Commission. Key City and Zoo staff will then appear before the Commission in March of 2025 in Palm Springs, for a final targeted interview, following which staff will learn if the Zoo has successfully been approved for accreditation.

Staff has worked to prioritize the Zoo's list of improvements/repairs and has worked with the Friends of the Charles Paddock Zoo to assist in this effort. Below are details of the Zoo's needs in preparation for the accreditation process. It is anticipated that addressing these improvements/repairs will meet the requirements for accreditation.

Charles Paddock Zoo Accreditation Needs Upgrades & Repair Cost Estimate

<u>Item:</u>	<u>Estimated Cost</u>
Wallaby Walkabout	\$25,000
Turtle Disposition Plan (primarily shipping & Airfare)	\$10,000
Graphics -including new Madagascar "Coming Soon"	\$10,000
Branding - New name/ logo/ promotion	\$10,000
Electrical upgrades	\$25,000
Repairs/Maintenance/Housekeeping	\$20,000
Corn Crib/Currasow enclosure/Bird Exhibit	\$55,000
Education Animal Building	\$300,000
12-18 Month Plan Upgrades & Repairs	\$150,000
Total Estimate :	\$605,000
Less Friends of the Zoo Contribution:	-\$300,000
<u>City Investment</u>	<u>\$305,000</u>

FISCAL IMPACT:

Preparation for the accreditation process will result in the expenditure of an estimated \$305,000 in General Fund reserves.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director and the Deputy City Manager.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

None.



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Department: Administrative Services
Date: 5/28/24
Placement: Public Hearing

TO: JAMES R. LEWIS, CITY MANAGER
FROM: JERI RANGEL, ADMINISTRATIVE SERVICES DIRECTOR
PREPARED BY: CINDY CHAVEZ, DEPUTY DIRECTOR OF ADMINISTRATIVE SERVICES
SUBJECT: Amendments to Fee Schedule

RECOMMENDATION:

Council adopt Draft Resolution, adopting amended fees and deposits to offset costs incurred in planning services, and a schedule of fees and charges for City services.

REPORT IN BRIEF:

The purpose of City government is to service the needs of the people. The City offers a variety of services to the community including those such as planning and building development services, park and recreational services, rental of City property, police and fire services, and other miscellaneous City services of a voluntary or limited nature. These services are funded in part by fees paid by the users and in part by a General Fund subsidy. The amount of General Fund subsidy that is required is predicated on the degree to which the City can recover the costs reasonably borne to provide the special services.

DISCUSSION:

California law allows the City to recover “costs reasonably borne” by the City in providing services. However, the fee may not exceed those “costs reasonably borne” or it is by definition a special tax that must be approved by two-thirds of the voters. In 2022, the City hired a consultant, Revenue & Cost Specialists, LLC (RCS) to perform a complete Cost Allocation and User Fee Study. RCS is an expert in the industry and has been providing fee and costing services to local government agencies for 44 years. RCS provided similar services for the City in 2002, 2006, and 2014.

Fee increases were considered and adopted by Council on May 23, 2023. In 2014, Council directed staff to bring back the issue of adjusting fees annually using the Consumer Price Index (CPI). The CPI adjustment for year ending 2023 is 3.48%. The CPI used was the California weighted average change from calendar 2022 to 2023 that is calculated by the State Department of Industrial Relations. Attached, as Exhibit A to the Draft Resolution, is a summary fee comparison detailing the proposed adjustments.

Recreation activity fees adjust according to cost recovery guidelines and local trends. The Council has consistently demonstrated the desire to keep recreation fees affordable to the average family, resulting in a benefit to the entire community. In this Fee Schedule update, most recreational activity fees are only being proposed to increase by CPI.

Council has historically indicated their intention to have development pay for itself. The majority of the development fees proposed are at 100% cost recovery. Recovering the full cost of the service allows the City to deliver the development services more efficiently as it helps to provide the funding for the staffing needs of the department. As discussed during previous Council meetings, there are some development fees that continue to be subsidized for economic development reasons. Fees such as outdoor dining encroachment permits and sign permits fall into this category.

Other fees are limited by State law. Those cost recovery fees will remain at a constant level unless they are updated by the State.

The remaining fees, which are neither managed by the State nor fall into the already discussed categories, were adjusted to reflect the actual changes in the costs of providing those services.

The Service Fees will go into effect sixty days (60) after the resolution is adopted.

ALTERNATIVES TO THE STAFF RECOMMENDATION:

1. Council may change any of the proposed fees not limited by State law.
2. Council may keep the current fees. This option is not recommended as the amount of tax dollars necessary to provide these services would increase, reducing the amount of money available for key Council priorities.

FISCAL IMPACT:

There will be an increase in operating revenue resulting from the CPI increase, with an offsetting increase in costs to provide the services.

REVIEWED BY OTHERS:

This item has been reviewed by the Administrative Services Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. Draft Resolution
2. Schedule of Fees and Charges for Service Fees - Current vs. Proposed Fee Schedule (Exhibit A)

DRAFT RESOLUTION

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, ADOPTING AMENDED FEES AND DEPOSITS TO OFFSET COSTS INCURRED IN PLANNING SERVICES, AND A SCHEDULE OF FEES AND CHARGES FOR CITY SERVICES

WHEREAS, the City wishes to comply with both the letter and the spirit of Article XIIB of the California Constitution and limit the growth of taxes; and,

WHEREAS, the City of Atascadero provides various planning and building development services to the public including, but not limited to, processing applications, reviewing plans and maps, issuing permits and reviewing development agreements (the “Planning Services”); and,

WHEREAS, the City of Atascadero desires to establish a policy of recovering some portion of the costs reasonably borne of providing special services, including but not limited to park and recreation services, rental of City property, police and fire services, and other miscellaneous City services, of a voluntary or limited nature, such that general taxes are not diverted from general services of a broad nature and thereby utilized unfairly and inequitably such special services (“City Services”); and,

WHEREAS, City Council intends to collect various fees (the “Fees”) and, in certain cases, require advance deposit of the Fees, to offset the costs associated with providing the Planning Services and City Services; and,

WHEREAS, because some of the Fees are described in Government Code section 66014, (i) notice of the time and place of this meeting as well as a general description of the matter to be considered are to be mailed at least 14 days prior to the date of this meeting to those parties (if any) who have filed requests for such notification, and (ii) data indicating the amount of the estimated cost required to provide the Services and the resources anticipated to fund the Planning Services were made available to the public at least 10 days prior to the date of this meeting, all in accordance with Government Code section 66016; and,

WHEREAS, Government Code Section 66016 applies to fees authorized in Government Code sections 51287, 56383, 57004, 65104, 65456, 65863.7, 65909.5, 66013, 66014 and 66451.2, Health & Safety Code sections 17951, 19132.3 and 19852, Public Resources Code section 41901 and Public Utilities Code section 21671.5 consisting of primarily fees for zoning variances, zoning changes, use permits, building inspections, building permits, filing and processing applications and petitions filed with LAFCO, the processing of subdivision maps, tentative, final and parcel maps and planning services to be charged for development projects; and,

WHEREAS, Government Code Section 66018 applies to the adopting or increasing fees to which a specific statutory notice requirement does not apply; and

WHEREAS, pursuant to Government Code sections 66016 and 66018 the enactment or increase in any fees to be charged for services must be adopted by the City Council by ordinance or resolution, after providing notice and holding a public hearing; and,

WHEREAS, the City Council finds that the fee schedule detailed in Exhibit A attached hereto and incorporated herein by reference is consistent with the City of Atascadero General Plan; and,

WHEREAS, pursuant to Government Code Sections 66016 and 66018, the data required to be made available to the public prior to increasing the amount of the fees by this resolution was made available for public review at least 10 days prior to the date of this meeting; and,

WHEREAS, pursuant to Government Code Sections 66014, 66106, 66018 and 6062a, notice of a public hearing on the increase to the amount of fees was published twice, with at least five days intervening the two publications, commencing at least ten days prior to the date of this meeting; and,

WHEREAS, a duly noticed public hearing before the City Council was held on May 28, 2024, at which public testimony was received and duly considered on the proposed Planning Services and City Services Fees; and,

WHEREAS, the City Council has previously adopted Resolution No. 2023-039, setting forth such fees, and desires to amend and restate that Resolution in this Resolution, without rescinding said adoption; and,

WHEREAS, the amount of the Fees do not exceed the true cost of providing the Planning Services and City Services; and,

WHEREAS, the increase to the amount of the fees is not a “project” subject to the California Environmental Quality Act because it is a funding mechanism having no physical effect on the environment.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Atascadero:

SECTION 1. Recitals. The foregoing recitals are true and correct and the City Council so finds and determines.

SECTION 2. Establishment of the Fees. The Fees are hereby established in the amounts detailed on Exhibit A for the purpose of funding the cost of providing the Services.

SECTION 3. Collection of the Fees. The Fees levied pursuant to this Resolution shall be paid to the City either at the time the Planning Service or City Service is requested or required or shall, in certain cases, be advanced to the City in the form of an advance deposit as further detailed on Exhibit A.

SECTION 4. Constitutionality. If any portion of this Resolution is declared invalid or unconstitutional then it is the intention of the City Council to have passed the entire Resolution and all its component parts, and all other sections of this Resolution shall remain in full force and effect.

SECTION 5. Repealer. All resolutions and other actions of the City Council in conflict with the contents of this Resolution are hereby repealed.

SECTION 6. Effective Date. This Resolution shall take effect 60 days after the effective date of this Resolution, and shall remain in effect, until revised by the City Council.

PASSED AND ADOPTED at a regular meeting of the City Council held this _____ day of May, 2024.

On motion by _____ and seconded by _____, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO:

Heather Moreno, Mayor

ATTEST:

Lara K. Christensen, City Clerk

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PLANNING			
24-001	ADMINISTRATIVE USE PERMIT REVIEW	Non-commercial wall mural - No charge Minor Outdoor Amplified Music - \$106 per application (subsidized) Other - \$2,027 per application	Non-commercial wall mural - No charge Minor Outdoor Amplified Music - \$109 per application (subsidized) Other - \$2,094 per application
24-001-Sign	SIGNAGE ADMINISTRATIVE USE PERMIT REVIEW	\$106 per application, inclusive of noticing and label generation fees (subsidized)	\$109 per application, inclusive of noticing and label generation fees (subsidized)
24-002	MINOR CONDITIONAL USE PERMIT REVIEW	\$2,951 per application	\$3,048 per application
24-003	MAJOR CONDITIONAL USE PERMIT REVIEW	Standard (less than 5 acres) - \$6,287 per application Major (5 acres or greater) - \$10,198 per application	Standard (less than 5 acres) - \$6,494 per application Major (5 acres or greater) - \$10,534 per application
24-004	VARIANCE APPLICATION	\$3,146 per application	\$3,250 per application
24-006	DEVELOPMENT AGREEMENT	\$15,836 deposit with staff charges at the fully allocated hourly rates plus any outside or legal expenses	\$16,358 deposit with staff charges at the fully allocated hourly rates plus any outside or legal expenses
24-006A	PLANNING AGREEMENT PREPARATION	\$174 per agreement	\$180 per agreement
24-007	SPECIFIC PLAN	\$12,668 deposit with staff charges at the fully allocated hourly rates plus any outside or legal expenses	\$13,086 deposit with staff charges at the fully allocated hourly rates plus any outside or legal expenses
24-008	GENERAL PLAN/ZONING MAP AMENDMENT	\$6,076 per application	\$6,276 per application

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PLANNING (continued)			
24-010	GENERAL PLAN/ZONING TEXT AMENDMENT	Minor - \$2,523 per application Major - \$6,614 per application Combined with a map and/or master plan of development (CUP) - 50% of these fees	Minor - \$2,606 per application Major - \$6,832 per application Combined with a map and/or master plan of development (CUP) - 50% of these fees
24-011	TENTATIVE PARCEL MAP	\$5,495 per application	\$5,676 per application
24-012	TENTATIVE TRACT MAP	\$7,770 per map plus \$100 per lot over 10 lots	\$8,026 per map plus \$104 per lot over 10 lots
24-013	CONDOMINIUM CONVERSION TENTATIVE MAP	\$6,720 per map plus \$111 per unit over 15 units Commercial - \$2,998 per map	\$6,941 per map plus \$115 per unit over 15 units Commercial - \$3,097 per map
24-014	PRECISE PLAN	\$2,085 per application	\$2,154 per application
24-015	MAP/CONDITIONAL USE PERMIT RECONSIDERATION/AMENDMENT REVIEW	\$2,729 per application	\$2,819 per application
24-015A	PLANNED DEVELOPMENT REPEAL	\$1,225 per application	\$1,265 per application
24-016	ENVIRONMENTAL IMPACT REPORT REVIEW	10% of contract consultant amount for City staff review	10% of contract consultant amount for City staff review

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PLANNING (continued)			
24-016A	ENVIRON MITIGATION NEGATIVE DECLARATION	Standard - \$3,209 per application in addition to other application fees where applicable Expanded - \$5,352 per application in addition to other application fees where applicable	Standard - \$3,315 per application in addition to other application fees where applicable Expanded - \$5,529 per application in addition to other application fees where applicable
24-016B	ENVIRONMENTAL CATEGORICAL EXEMPTION	\$227 per application Class 32 - \$1,066 per application Plus any filing fees	\$234 per application Class 32 - \$1,101 per application Plus any filing fees
24-016C	ENVIRONMENTAL IMPACT REPORT/MITIGATED NEGATIVE DECLARATION ADDENDUM	\$2,771 per application in addition to other application fees where applicable	\$2,863 per application in addition to other application fees where applicable
24-017	ANNEXATION	\$21,114 deposit with staff charges at the fully allocated hourly rates plus any outside or legal expenses	\$21,810 deposit with staff charges at the fully allocated hourly rates plus any outside or legal expenses
24-018	LOT LINE ADJUSTMENT REVIEW	Historic Conflict Lot Line Adjustment - \$1,584 per application (subsidized) Urban Lot Split- \$2,713 per application Other - \$2,117 per application	Historic Conflict Lot Line Adjustment - \$1,636 per application (subsidized) Urban Lot Split- \$2,803 per application Other - \$2,186 per application
24-019	VOLUNTARY LOT MERGER	\$929 per application	\$960 per application
24-022	SUBSTANTIAL CONFORMANCE FINDING	\$628 per application	\$649 per application
24-023	FINDING OF CONVENIENCE & NECESSITY	\$523 per application	\$540 per application

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PLANNING (continued)			
24-024	TEMPORARY OCCUPANCY REVIEW	Commercial/Industrial/Multi-Family - \$1,198 per application Single Family Residential - \$528 per application	Commercial/Industrial/Multi-Family - \$1,238 per application Single Family Residential - \$545 per application
24-025	ADMINISTRATIVE TIME EXTENSION REVIEW	\$591 per application	\$611 per application
24-026	PLANNING COMMISSION TIME EXTENSION REVIEW	\$977 per application	\$1,009 per application
24-027	CONTINUANCE	\$317 per application	\$327 per application
24-028	APPEAL TO PLANNING COMMISSION	\$1,615 per application for 70% cost recovery	\$1,668 per application for 70% cost recovery
24-029	APPEAL TO CITY COUNCIL	\$1,816 per application for 70% cost recovery	\$1,876 per application for 70% cost recovery
24-030	NATIVE TREE REMOVAL PERMIT	Dead/Diseased Tree - No Charge Non-Heritage Tree - \$259 per permit Heritage Tree - \$1,230 per permit	Dead/Diseased Tree - No Charge Non-Heritage Tree - \$267 per permit Heritage Tree - \$1,270 per permit
24-031	TREE PROTECTION PLAN / INSPECTION FOR BUILDING PERMIT	Minor (No Arborist Required) - No charge if done in conjunction with Planning Plan Check fee or \$84 per review if done independently Major - \$343 per application Fee includes one inspection and one re-inspection	Minor (No Arborist Required) - No charge if done in conjunction with Planning Plan Check fee or \$87 per review if done independently Major - \$354 per application Fee includes one inspection and one re-inspection

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PLANNING (continued)			
24-032	RE-INSPECT TREE PROTECTION	\$174 per inspection Fee imposed on the third and any subsequent inspections	\$180 per inspection Fee imposed on the third and any subsequent inspections
24-037	BUILDING ADDRESS ASSIGNMENT PROCESSING	SFR/Duplex - \$84 per application 3-10 Units - \$127 per application 11-20 Units - \$385 per application Each Additional Unit over 20 - \$26	SFR/Duplex - \$87 per application 3-10 Units - \$131 per application 11-20 Units - \$398 per application Each Additional Unit over 20 - \$27
24-038	REAL ESTATE/PROPERTY INFO LETTER	\$243 per letter	\$251 per letter
24-039	CONSTRUCTION OPERATION AFTER-HOURS	\$554 per application	\$573 per application
24-040	PLANNING REVIEW/APPROVAL OF ENCROACHMENT PERMT	\$216 per permit	\$224 per permit
24-040A	PLANNING REVIEW / APPROVAL OF BUILDING PERMIT	CUP/PD Compliance - \$602 per application DRC Review - \$517 per application Other - 15% of the Building Permit Fee + 7.5% Community Development Technology Surcharge	Base Fee - 15% of the Building Permit Fee CUP/PD Compliance - \$622 per application DRC Review - \$534 per application + 7.5% Community Development Technology Surcharge
24-040B	PLANNING INSPECTION	\$174 per inspection	\$180 per inspection
24-040C	PLANNING- EXTRA PLAN CHECK/INSPECTION	\$174 per hour OR 1.3 times the actual cost of contract consultant	\$180 per hour OR 1.3 times the actual cost of contract consultant

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PLANNING (continued)			
24-040D	PLANNING BUSINESS LICENSE REVIEW	Commercial Zoning Clearance - \$84 per application Home Occupation - \$84 per application Change of Owner - \$74 per application	Commercial Zoning Clearance - \$87 per application Home Occupation - \$87 per application Change of Owner - \$76 per application
24-040E	BUILDING BUSINESS LICENSE INSPECTION	\$190 per business	\$196 per business
24-040F	COMMUNITY DEVELOPMENT MISCELLANEOUS SERVICES	Charge all staff at the fully allocated hourly rates plus any outside legal expenses	Charge all staff at the fully allocated hourly rates plus any outside legal expenses
24-040G	COMMUNITY DEVELOPMENT TECHNOLOGY SURCHARGE	7.5% of fees as detailed in the individual services	7.5% of fees as detailed in the individual services

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
BUILDING			
24-041	BUILDING PLAN CHECK	Plan Check - 65% of Building Permit Fee Outside Plan Check - 1.3 times the cost of outside consultant Disabled Access - Additional 10% of Building Permit Fee Energy Efficiency - Additional 10% of Building Permit Fee + 7.5% Community Development Technology Surcharge	Plan Check - 65% of Building Permit Fee Outside Plan Check - 1.3 times the cost of outside consultant Disabled Access - Additional 10% of Building Permit Fee Energy Efficiency - Additional 10% of Building Permit Fee + 7.5% Community Development Technology Surcharge
24-041A	BUILDING PERMIT/INSPECTION	Building Permit - The current International Code Council (ICC) Building Valuation Tables including inflation indexing, plus 25%. Plumbing Permits-10% of Building Permit Fee (\$92 minimum) Mechanical Permits-10% of Building Permit Fee (\$92 minimum) Electrical Permits-10% of Building Permit Fee (\$92 minimum) + 7.5% Community Development Technology Surcharge	Building Permit - The current International Code Council (ICC) Building Valuation Tables including inflation indexing, plus 25%. Plumbing Permits-10% of Building Permit Fee (\$95 minimum) Mechanical Permits-10% of Building Permit Fee (\$95 minimum) Electrical Permits-10% of Building Permit Fee (\$95 minimum) + 7.5% Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
BUILDING (continued)			
24-041C	OVER THE COUNTER MISCELLANEOUS BUILDING PERMIT	Water Heater - \$100 Minor (1 inspection) - \$259 per permit Major (2 inspections) - \$449 per permit + 7.5% Community Development Technology Surcharge	Water Heater - \$104 Minor (1 inspection) - \$267 per permit Major (2 inspections) - \$463 per permit + 7.5% Community Development Technology Surcharge
24-041D	EXPRESS BUILDING PERMIT	Residential Rooftop Solar Systems under 10 KW - \$475 per permit (subsidized) Other - \$633 per permit + 7.5% Community Development Technology Surcharge	Residential Rooftop Solar Systems under 10 KW - \$491 per permit (subsidized) Other - \$654 per permit + 7.5% Community Development Technology Surcharge
24-041D-Sign	EXPRESS SIGN PERMIT	Sign Permit - \$79 per permit (subsidized) Exclusive of Monument Signs and Pole Signs	Sign Permit - \$82 per permit (subsidized) Exclusive of Monument Signs and Pole Signs
24-048	PLAN REVISION CHECKING	\$216 plus actual cost of City staff at the fully allocated hourly rates or actual cost of consultant	\$224 plus actual cost of City staff at the fully allocated hourly rates or actual cost of consultant
24-049	BUILDING - EXTRA PLAN CHECK/INSPECTION	Plan Check - \$37 plus \$190 per hour, 1 hour minimum or the actual cost of contract consultant Inspection - \$227 per extra inspection	Plan Check - \$38 plus \$196 per hour, 1 hour minimum or the actual cost of contract consultant Inspection - \$234 per extra inspection
24-050	RESTAMPING OF APPROVED PLANS	Single Family Residential - \$206 per plan Commercial/Industrial/Multi-Family - \$375 per plan	Single Family Residential - \$213 per plan Commercial/Industrial/Multi-Family - \$387 per plan

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
BUILDING (continued)			
24-051	LOST INSPECTION CARD	\$132 per card	\$136 per card
24-051A	CHANGE OF CONTRACTOR OR RESPONSIBLE PARTY	\$206 per application	\$213 per application
24-052	APPEAL TO BOARD OF APPEALS	\$1,378 per appeal for 70% cost recovery	\$1,423 per appeal for 70% cost recovery
24-068	GENERAL PLAN MAINTENANCE	7% of all building permits, which includes new structures and additions	7% of all building permits, which includes new structures and additions
24-069A	DISTRICT FORMATION PROCESSING	\$4,972 per district plus any outside consultant or legal costs	\$5,136 per district plus any outside consultant or legal costs
24-069B	COMMUNITY FACILITY DISTRICT ANNEXATION	\$1,436 per district plus any outside consultant or legal costs	\$1,483 per district plus any outside consultant or legal costs
24-117	CHANGE OF OCCUPANCY	\$259 per application	\$267 per application

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
FIRE DEVELOPMENT			
24-042	FIRE BUILDING PLAN CHECK/INSPECTION	30% of Building Plan Check Fees + 7.5% Community Development Technology Surcharge	30% of Building Plan Check Fees + 7.5% Community Development Technology Surcharge
24-042A	FIRE SPRINKLER PLAN CHECK	New Residential Plan Check - \$195 plus actual cost of consultant Tenant Improvement Residential Remodel Plan Check - \$195 plus actual cost of consultant Commercial Plan Check - \$195 plus actual cost of City staff at the fully allocated hourly rates or actual cost of consultant + 7.5% Community Development Technology Surcharge	New Residential Plan Check - \$202 plus actual cost of consultant Tenant Improvement Residential Remodel Plan Check - \$202 plus actual cost of consultant Commercial Plan Check - \$202 plus actual cost of City staff at the fully allocated hourly rates or actual cost of consultant + 7.5% Community Development Technology Surcharge
24-042B	FIRE SPRINKLER INSPECTION	Residential - \$285 Commercial - Charges at the fully allocated hourly rates plus any outside expenses + 7.5 Community Development Technology Surcharge	Residential - \$294 Commercial - Charges at the fully allocated hourly rates plus any outside expenses + 7.5 Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
FIRE DEVELOPMENT (continued)			
24-042C	EXTRA FIRE PLAN CHECK/INSPECTION	\$206 per hour extra plan check or inspection OR Charge 130% of Actual Contract Costs for projects that use contract services Fee to be assessed after initial plan check/inspection and one re-check/inspection	\$213 per hour extra plan check or inspection OR Charge 130% of Actual Contract Costs for projects that use contract services Fee to be assessed after initial plan check/inspection and one re-check/inspection
24-042D	SPRINKLER EXPRESS PLAN CHECK/INSPECTION	\$227 per permit + 7.5% Community Development Technology Surcharge	\$234 per permit + 7.5% Community Development Technology Surcharge
24-043A	FIRE ALARM PLAN CHECK	\$195 plus actual cost of consultant + 7.5% Community Development Technology Surcharge	\$202 plus actual cost of consultant + 7.5% Community Development Technology Surcharge
24-043B	FIRE ALARM INSPECTION	Single Family Residential - \$232 Other - Charges at the fully allocated hourly rates plus any outside expenses + 7.5% Community Development Technology Surcharge	Single Family Residential - \$240 Other - Charges at the fully allocated hourly rates plus any outside expenses + 7.5% Community Development Technology Surcharge
24-044A	NEW FIRE HOOD/SUPPRESSION PLAN CHECK	\$121 plus actual cost of consultant + 7.5% Community Development Technology Surcharge	\$125 plus actual cost of consultant + 7.5% Community Development Technology Surcharge
24-044B	NEW FIRE HOOD/SUPPRESSION INSPECTION	\$132 per project + 7.5% Community Development Technology Surcharge	\$136 per project + 7.5% Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
FIRE DEVELOPMENT (continued)			
24-045	PRIVATE HYDRANT SYSTEM PC/INSPECTION	\$607 per system plus actual cost of consultant + 7.5% Community Development Technology Surcharge	\$627 per system plus actual cost of consultant + 7.5% Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS			
24-053	ON-SITE GRADING PLAN CHECK - BUILDING	Minor (Less than 50 CY/1,000 sq ft of disturbed soil) - \$79 Single Family Residence/Accessory: 50-100 CY of disturbed soil - \$333 101-500 CY of disturbed soil - \$412 501+ CY/1 acre or more of disturbed soil - \$633 Commercial/Industrial/Multifamily - \$697 plus \$164 per each 5,000 sq ft of disturbed soil after the first 5,000 sq ft Rough Grading - \$501 + 7.5% Community Development Technology Surcharge	Minor (Less than 50 CY/1,000 sq ft of disturbed soil) - \$82 Single Family Residence/Accessory: 50-100 CY of disturbed soil - \$344 101-500 CY of disturbed soil - \$425 501+ CY/1 acre or more of disturbed soil - \$654 Commercial/Industrial/Multifamily - \$720 plus \$169 per each 5,000 sq ft of disturbed soil after the first 5,000 sq ft Rough Grading - \$518 + 7.5% Community Development Technology Surcharge
24-053C	ENGINEERING-EXTRA PLAN CHCK/INSPECTION	\$37 per plan/inspection plus \$158 per hour per extra plan check or inspection OR Charge 130% of actual contract costs for projects that use contract services Fee to be assessed after initial plan check/inspection and one re-check/inspection	\$38 per plan/inspection plus \$164 per hour per extra plan check or inspection OR Charge 130% of actual contract costs for projects that use contract services Fee to be assessed after initial plan check/inspection and one re-check/inspection
24-053D	TEMPORARY STOCKPILE PERMIT	\$422 per permit	\$436 per permit

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-053E	PLOT PLAN REVIEW	Single Family - \$79 per lot Commercial/Industrial/Multi-Family - \$158 per lot	Single Family - \$82 per lot Commercial/Industrial/Multi-Family - \$164 per lot
24-053F	ENGINEERING COMMERCIAL MODIFICATION REVIEW	\$143 per application	\$147 per application
24-053G	ON-SITE STORMWATER MANAGEMENT PLAN CHECK	Tier 3 - \$697 Tier 4 - \$1,077 Tiers 1 and 2 are included in grading plan check fees + 7.5% Community Development Technology Surcharge	Tier 3 - \$720 Tier 4 - \$1,112 Tiers 1 and 2 are included in grading plan check fees + 7.5% Community Development Technology Surcharge
24-053H	SWPPP PLAN CHECK/INSPECTION	Plan Check - \$380 Inspection - \$317 per quarter per site + 7.5% Community Development Technology Surcharge	Plan Check - \$393 Inspection - \$327 per quarter per site + 7.5% Community Development Technology Surcharge
24-053W	OWTS (SEPTIC SYSTEM) PLAN CHECK	New/Modified (associated with a structure) - \$417 per plan Replacement (not associated with a structure) - \$575 per plan + 7.5% Community Development Technology Surcharge	New/Modified (associated with a structure) - \$431 per plan Replacement (not associated with a structure) - \$594 per plan + 7.5% Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-054	ON-SITE GRADING INSPECTION	Minor (Less than 50 CY/1,000 sq ft of disturbed soil) - \$121 Single Family Residence/Accessory: 50-100 CY of disturbed soil - \$306 101-500 CY of disturbed soil - \$433 501+ CY/1 acre or more of disturbed soil - \$818 Commercial/Industrial/Multi-Family - \$533 plus \$259 per each 5,000 sq ft of disturbed soil after the first 5,000 sq ft + 7.5% Community Development Technology Surcharge	Minor (Less than 50 CY/1,000 sq ft of disturbed soil) - \$125 Single Family Residence/Accessory: 50-100 CY of disturbed soil - \$316 101-500 CY of disturbed soil - \$447 501+ CY/1 acre or more of disturbed soil - \$845 Commercial/Industrial/Multi-Family - \$551 plus \$267 per each 5,000 sq ft of disturbed soil after the first 5,000 sq ft + 7.5% Community Development Technology Surcharge
24-054B	ON-SITE STORMWATER MGMT INSPECTION	\$385 per drainage facility + 7.5% Community Development Technology Surcharge	\$398 per drainage facility + 7.5% Community Development Technology Surcharge
24-054W	OWTS (SEPTIC SYSTEM) INSPECTION	\$375 per permit + 7.5% Community Development Technology Surcharge	\$387 per permit + 7.5% Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-055	PUBLIC IMPROVEMENT PLAN CHECK	\$0 - \$50,000 - 7.40% of the Engineer's Estimate (\$1,056 minimum)	\$0 - \$50,000 - 8.00% of the Engineer's Estimate (\$1,091 minimum)
		\$50,001 - \$100,000 - \$3,905 plus 4.45% of the Engineer's Estimate over \$50,000	\$50,000 - \$100,000 - \$4,030 plus 4.45% of the Engineer's Estimate over \$50,000
		\$100,001 - \$500,000 - \$6,255 plus 1.55% of the Engineer's Estimate over \$100,000	\$100,000 - \$500,000 - \$6,255 plus 1.55% of the Engineer's Estimate over \$100,000
		\$500,001 - \$1,000,000 - \$12,815 plus 1.07% of the Engineer's Estimate over \$500,000	\$500,000 - \$1,000,000 - \$12,455 plus 1.07% of the Engineer's Estimate over \$500,000
		\$1,000,001 - \$2,000,000 - \$18,415 plus 0.53% of the Engineer's Estimate over \$1,000,000	\$1,000,000+ - \$17,805 plus 0.53% of the Engineer's Estimate over \$1,000,000
		\$2,000,001+ - \$24,015 plus 0.53% of the Engineer's Estimate over \$2,000,000	\$2,000,001+ - \$24,015 plus 0.53% of the Engineer's Estimate over \$2,000,000
		+ 7.5% Community Development Technology Surcharge	+ 7.5% Community Development Technology Surcharge

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-055A	PUBLIC IMPROVEMENT INSPECTION	<p>\$0 - \$50,000 - 3.92% of the Engineer's Estimate (\$1,056 minimum)</p> <p>\$50,001 - \$100,000 - \$2,070 plus 4.07% of the Engineer's Estimate over \$50,000</p> <p>\$100,001 - \$500,000 - \$4,215 plus 0.98% of the Engineer's Estimate over \$100,000</p> <p>\$500,001 - \$1,000,000 - \$8,335 plus 0.82% of the Engineer's Estimate over \$500,000</p> <p>\$1,000,001 - \$2,000,000 - \$12,635 plus 0.47% of the Engineer's Estimate over \$1,000,000</p> <p>\$2,000,001+ - \$17,635 plus 0.47% of the Engineer's Estimate over \$2,000,000</p> <p>+ 7.5% Community Development Technology Surcharge</p>	<p>\$0 - \$50,000 - 4.00% of the Engineer's Estimate (\$1,091 minimum)</p> <p>\$50,000 - \$100,000 - \$2,135 plus 4.07% of the Engineer's Estimate over \$50,000</p> <p>\$100,000 - \$500,000 - \$4,170 plus 0.98% of the Engineer's Estimate over \$100,000</p> <p>\$500,000 - \$1,000,000 - \$8,090 plus 0.82% of the Engineer's Estimate over \$500,000</p> <p>\$1,000,000+ - \$12,190 plus 0.47% of the Engineer's Estimate over \$1,000,000</p> <p>\$2,000,001+ - \$17,635 plus 0.47% of the Engineer's Estimate over \$2,000,000</p> <p>+ 7.5% Community Development Technology Surcharge</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-055B	ENGINEERING AGREEMENTS	Public or Subdivision Improvements (Tract Map) - \$739 per agreement Deferral of Improvements (Parcel Map) - \$406 per agreement Sewer Extension Reimbursement - \$591 per agreement Oversizing Improvements Reimbursement - \$1,161 per agreement Maintenance of Stormwater Facilities - \$322 per agreement	Public or Subdivision Improvements (Tract Map) - \$763 per agreement Deferral of Improvements (Parcel Map) - \$420 per agreement Sewer Extension Reimbursement - \$611 per agreement Oversizing Improvements Reimbursement - \$1,200 per agreement Maintenance of Stormwater Facilities and OWTS (Septic) Pre-Treatment Systems - \$333 per agreement plus \$183 annually
24-056	TEMPORARY ENCROACHMENT PERMIT	Short Term - \$111 Long Term - Minor - \$206 Long Term - Major - \$797 Outdoor Dining - New - \$380 (subsidized) Outdoor Dining - Annual - \$174 (subsidized) Overhead Structure - \$164 Miscellaneous Minor Use - \$111	Short Term - \$115 Long Term - Minor - \$213 Long Term - Major - \$823 Outdoor Dining - New - \$393 (subsidized) Outdoor Dining - Annual - \$180 (subsidized) Overhead Structure - \$169 Miscellaneous Minor Use - \$115

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-057	STANDARD ENCROACHMENT PERMIT - IMPROVEMENT	Driveway Approach: New - \$465 Replacement - \$195 New Curb/Gutter - \$465 plus \$4 for each linear foot New Sidewalk - \$322 plus \$4 for each linear foot Miscellaneous Minor - \$164 Sidewalk and Curb/Gutter Repairs- \$0 (subsidized) Non-City Maintained Road Repairs - \$0 (subsidized) Downtown Street Tree Installation/Replacement - \$0 (subsidized) Public Improvements - See 24-055 and 24-055A	Driveway Approach: New - \$480 Replacement - \$202 New Curb/Gutter - \$480 plus \$4 for each linear foot New Sidewalk - \$333 plus \$4 for each linear foot Miscellaneous Minor - \$169 Sidewalk and Curb/Gutter Repairs- \$0 (subsidized) Non-City Maintained Road Repairs - \$0 (subsidized) Downtown Street Tree Installation/Replacement - \$0 (subsidized) Public Improvements - See 24-055 and 24-055A
24-058	STANDARD ENCROACHMENT PERMIT - UTILITY	Sewer Main Connection Inspection: SFR - \$269 per connect Commercial/Industrial/Multi-Family - \$428 per connect Trenching: Under 4 ft. depth - \$713 plus \$2 per linear foot 4 to 8 ft. depth - \$713 plus \$4 per linear foot Over 8 ft. depth - \$713 plus \$8 per linear foot Boring - \$713 plus \$4 per each 10 linear feet Overhead - \$713 plus \$2 per each 10 linear feet Obstructions: Surface - \$322 plus \$90 per obstruction Subsurface - \$322 plus \$63 per obstruction Overhead - \$322 plus \$42 per obstruction Potholing - \$311 per every 10 potholes or fraction thereof Broadband Fiber Installation - \$0 (subsidized)	Sewer Main Connection Inspection: SFR - \$278 per connect Commercial/Industrial/Multi-Family - \$442 per connect Trenching: Under 4 ft. depth - \$736 plus \$2 per linear foot 4 to 8 ft. depth - \$736 plus \$4 per linear foot Over 8 ft. depth - \$736 plus \$9 per linear foot Boring - \$736 plus \$4 per each 10 linear feet Overhead - \$736 plus \$2 per each 10 linear feet Obstructions: Surface - \$333 plus \$93 per obstruction Subsurface - \$333 plus \$65 per obstruction Overhead - \$333 plus \$44 per obstruction Potholing - \$322 per every 10 potholes or fraction thereof Broadband Fiber Installation - \$0 (subsidized)
24-058A	TRAFFIC CONTROL PLAN CHECK	Minor - \$153 per project Standard - \$306 per project Major - \$713 per project	Minor - \$158 per project Standard - \$316 per project Major - \$736 per project

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-058B	TRAFFIC CONTROL INSPECTION	Minor - \$63 plus \$63 per day after the first day Standard - \$137 plus \$63 per day after the first day Major - \$306 plus \$63 per day after the first day	Minor - \$65 plus \$65 per day after the first day Standard - \$142 plus \$65 per day after the first day Major - \$316 plus \$65 per day after the first day
24-058C	SPECIAL EVENT STREET CLOSURE	Review - \$137 plus the fully allocated hourly rate for all personnel involved after 1 hour Install - \$290 plus the fully allocated hourly rate for all personnel involved after 2 hours	Review - \$142 plus the fully allocated hourly rate for all personnel involved after 1 hour Install - \$300 plus the fully allocated hourly rate for all personnel involved after 2 staff hours
24-058D	BLANKET ENCROACHMENT PERMIT	\$5,263 per utility per year plus \$216 per sub-permit in addition to any franchise payments	\$5,436 per utility per year plus \$224 per sub-permit in addition to any franchise payments
24-058E	MISCELLANEOUS ENCROACHMENT PERMIT	Request for Time Extension/Renewal of Expired Permit - \$121 per permit Encroachment without a permit - Double fees Illegal Encroachment - Actual Costs	Request for Time Extension/Renewal of Expired Permit - \$125 per permit Encroachment without a permit - Double fees Illegal Encroachment or Removal/Relocation - Actual Costs Restoration of Right-of-Way and/or Street - Actual Costs
24-059	FINAL PARCEL MAP CHECK	\$3,125 per map plus \$110 plus \$6 per lot GIS fee	\$3,228 per map plus \$113 plus \$7 per lot GIS fee
24-060	FINAL TRACT MAP CHECK	\$3,969 per map plus \$43 per lot after 5 lots plus \$110 plus \$6 per lot GIS Fee Affordable Housing - \$691 per application plus \$174 per unit plus outside or legal costs	\$4,100 per map plus \$45 per lot after 5 lots plus \$113 plus \$7 per lot GIS Fee Affordable Housing - \$714 per application plus \$180 per unit plus outside or legal costs

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PUBLIC WORKS (continued)			
24-061	CONDOMINIUM CONVERSION FINAL MAP	\$3,252 per map Plus actual contract costs for over 15 units Plus any recording fees	\$3,359 per map Plus actual contract costs for over 15 units Plus any recording fees
24-062	FINAL MAP AMENDMENT	\$3,289 per application Certificate of Correction - \$491 per application	\$3,397 per application Certificate of Correction - \$507 per application
24-063	STREET/RIGHT OF WAY ABANDONMENT PROCESS	\$5,183 per application	\$5,354 per application
24-064	CERTIFICATE OF COMPLIANCE	\$1,119 per certificate	\$1,156 per certificate
24-065	FLOOD PLAIN LETTER	\$649 per letter	\$671 per letter
24-066	TRANSPORTATION PERMIT	\$16 - Single Trip Permit \$90 - Annual/Repetitive Permit <i>Fees are set by the State</i>	\$16 - Single Trip Permit \$90 - Annual/Repetitive Permit <i>Fees are set by the State</i>
24-109	SEWER CONNECTION PROCESSING	\$84 per sewer connection permit	\$87 per sewer connection permit
24-110	EMERGENCY SEWAGE SPILL RESPONSE	Charge the fully allocated hourly rates for all personnel involved plus any outside or material costs	Charge the fully allocated hourly rates for all personnel involved plus any outside or material costs

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
POLICE			
24-069	CODE ENFORCEMENT	Recover the full costs related to the enforcement of the City's codes at a particular parcel if the parcel is not brought into compliance and court action is necessary. Notice of Non-Compliance - \$263 plus County fees	Recover the full costs related to the enforcement of the City's codes at a particular parcel if the parcel is not brought into compliance and court action is necessary. Notice of Non-Compliance - \$272 plus County fees
24-070	NOISE DISTURBANCE RESPONSE CALL-BACK	Full costs of all responding personnel	Full costs of all responding personnel
24-071	POLICE FALSE ALARM RESPONSE	First three responses within a calendar year - No Charge Each subsequent false alarm within a calendar year - \$190 per response	First three responses within a calendar year - No Charge Each subsequent false alarm within a calendar year - \$196 per response
24-072	DUI ACCIDENT RESPONSE INVESTIGATION	Charge the fully allocated hourly rate for all emergency personnel responding, not to exceed \$12,000 per incident by State Law.	Charge the fully allocated hourly rate for all emergency personnel responding, not to exceed \$12,000 per incident by State Law.
24-073	VEHICLE EQUIPMENT CORRECTION INSPECTION	\$74 per inspection	\$76 per inspection
24-074	VIN VERIFICATION	\$84 per request	\$87 per request
24-075	STORED/IMPOUNDED VEHICLE RELEASE	\$153 per vehicle	\$158 per vehicle
24-076	REPOSSESSED VEHICLE RELEASE	\$15 per vehicle This fee is set by State Law	\$15 per vehicle This fee is set by State Law
24-078	RECORDS CHECK/CLEARANCE LETTER	\$37 per letter plus notary fee if applicable	\$38 per letter plus notary fee if applicable

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
POLICE (continued)			
24-079	LIVE SCAN FINGERPRINT PROCESSING	No Charge - Volunteers for Seniors/Youth \$18 per person - community group coaches or leaders \$37 per person - all others	No Charge - Volunteers for Seniors/Youth \$19 per person - community group coaches or leaders \$38 per person - all others
24-080	POLICE REPORT COPY	As this service is covered by the Public Records Act, the fee should match the City's copy charge fee: 1st page - \$0.50 each additional page - \$0.10	As this service is covered by the Public Records Act, the fee should match the City's copy charge fee: 1st page - \$0.50 each additional page - \$0.10
24-081	POLICE DIGITAL FILE REPRODUCTION	\$5 per device	\$5 per device
24-082	CONCEALED CARRY WEAPONS LICENSE	Fee is set by State Law: New application - \$100 Renewal application - \$25 Amended application - \$10 Psychological testing costs are to be added to the above fee up to \$150 20% of the fee is collected upon filing of the initial application and is non-refundable. The balance of the fee is collected on issuance of the license.	New application administrative fee- \$163 Renewal application administrative fee- \$33 Amended application administrative fee- \$13 Fees set by State Law: Department of Justice initial Livescan- \$93 Department of Justice renewal Livescan- \$52 Psychological testing costs are to be added to the above fee up to \$150 20% of the fee is collected upon filing of the initial application and is non-refundable. The balance of the fee is collected on issuance of the license.
24-083	CIVIL SUBPOENA OF RECORDS	Reasonable Costs as set by State Law Deposit and Travel as set by State Law Fees are set by State Law (Evidence Code §1563 and Government Code §68096.1)	Reasonable Costs as set by State Law Deposit and Travel as set by State Law Fees are set by State Law (Evidence Code §1563 and Government Code §68096.1)

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
POLICE (continued)			
24-084	DUCES TECUM SUBPOENA	Reasonable Costs as set by State Law Fees are set by State Law (Evidence Code §1563)	Reasonable Costs as set by State Law Fees are set by State Law (Evidence Code §1563)
24-085	POLICE SPECIAL SERVICES	Full costs of all personnel required, plus any actual material or equipment expenses required for the event.	Full costs of all personnel required, plus any actual material or equipment expenses required for the event.

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
FIRE			
24-045A	FIRE SPRINKLER SERVICE LETTER	\$53 per letter	\$55 per letter
24-045B	FIRE CODE POSITION LETTER	\$317 per letter	\$327 per letter
24-046	FIRE FLOW TEST	\$259 per test	\$267 per test
24-086	TEMPORARY TENT/CIRCUS PERMIT	\$227 per permit plus \$100 per day after the first day	\$234 per permit plus \$104 per day after the first day
24-086A	PERMANENT TENT PERMIT	\$227 per permit	\$234 per permit
24-089	UNDERGROUND TANK REMOVAL	\$227 per tank - 1st inspection \$121 per tank - each subsequent inspection	\$234 per tank - 1st inspection \$125 per tank - each subsequent inspection
24-090	FIRE CODE PERMIT	\$206 per permit	\$213 per permit
24-091	ENGINE COMPANY INSPECTION	First 2 inspections - no charge 3rd and subsequent inspections - \$206 per inspection	First 2 inspections - no charge 3rd and subsequent inspections - \$213 per inspection
24-091A	SCHOOLS/HOTEL/MOTEL/ASSISTED LIVING FACILITY INSPECTION	\$538 per facility plus \$116 per floor after the first floor Fee includes two inspections	\$556 per facility plus \$120 per floor after the first floor Fee includes two inspections

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
FIRE (continued)			
24-091B	DAY CARE/GROUP HOME INSPECTION	Day Care/Group Home Facility Consultation - \$50 (maximum allowed under State law) Day Care Inspection - \$50 per permit (subsidized) Group Home Facility Inspection - \$232 per permit Fee includes two inspections	Day Care/Group Home Facility Consultation - \$50 (maximum allowed under State law) Day Care Inspection - \$50 per permit (subsidized) Group Home Facility Inspection - \$240 per permit Fee includes two inspections
24-091C	APARTMENT INSPECTION	3-15 units - \$185 16-50 units - \$285 51-100 units - \$491 101+ units - \$697 Fee includes two inspections	3-15 units - \$191 16-50 units - \$294 51-100 units - \$507 101+ units - \$720 Fee includes two inspections
24-092	FIRE FALSE ALARM RESPONSE	First 3 responses in a calendar year - No Charge Each subsequent response in a calendar year - \$401 per response	First 3 responses in a calendar year - No Charge Each subsequent response in a calendar year - \$414 per response
24-092A	NURSING HOME LIFT ASSIST	First 3 responses in a calendar year - No Charge Each subsequent response in a calendar year - \$465 per response	First 3 responses in a calendar year - No Charge Each subsequent response in a calendar year - \$480 per response
24-093	WEED ABATEMENT PROGRAM	Actual costs plus 166% Administrative Fee plus \$282 flat fee if lot must be cleared by the City This program is designed to only recover the cost of the properties that do not comply.	Actual costs plus 166% Administrative Fee plus \$291 flat fee if lot must be cleared by the City This program is designed to only recover the cost of the properties that do not comply.

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
FIRE (continued)			
24-094	HAZARDOUS MATERIALS RESPONSE	Charge the fully allocated hourly rates for all personnel involved.	Charge the fully allocated hourly rates for all personnel involved.
24-095	NEGLIGENT INCIDENT RESPONSE	Charge double the fully allocated hourly rates for all personnel involved.	Charge double the fully allocated hourly rates for all personnel involved.
24-096	FIRE/ARSON INVESTIGATION	Charge the fully allocated hourly rates for all personnel involved.	Charge the fully allocated hourly rates for all personnel involved.
24-098	FIRE INCIDENT REPORT COPY	As this service is covered by the Public Records Act, the fee should match the City's copy charge fee: 1st page - \$0.50 each additional page - \$0.10	As this service is covered by the Public Records Act, the fee should match the City's copy charge fee: 1st page - \$0.50 each additional page - \$0.10
24-098A	FIRE CODE OCCUPANCY LETTER	\$232 per letter	\$240 per letter
24-098B	FIRE MISCELLANEOUS SERVICES	Charge all staff at the fully allocated hourly rates plus any outside or legal expenses	Charge all staff at the fully allocated hourly rates plus any outside or legal expenses

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
RECREATION			
24-099	ADULT SPORTS	<p>The City Manager or Designee may set and change Adult Sports Fees according to cost recovery guidelines and local trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows:</p> <p>Adult Softball: \$719 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p> <p>Adult Basketball: \$473 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p> <p>Adult Kickball: \$421 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p> <p>Adult Volleyball: \$355 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p>	<p>The City Manager or Designee may set and change Adult Sports Fees according to cost recovery guidelines and local trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows:</p> <p>Adult Softball: \$719 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p> <p>Adult Basketball: \$489 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p> <p>Adult Kickball: \$436 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p> <p>Adult Volleyball: \$355 per team + \$5 per nonresident player or additional 10% if 8 or more nonresident players</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
RECREATION (continued)			
24-099	ADULT SPORTS (continued)	Adult Drop-in Programs: \$2 per person Light Fee: \$24 per hour Late Fee: After registration \$60 per team Forfeit Fee: \$30 per team Protest Fee: \$24 per team Add/Drop Fee: \$24 per transaction	Adult Drop-in Programs: \$2 per person Light Fee: \$25 per hour Late Fee: After registration \$62 per team Forfeit Fee: \$31 per team Protest Fee: \$25 per team Add/Drop Fee: \$25 per transaction
24-100	YOUTH SPORTS	The City Manager or Designee may set and change Youth Sports Fees according to cost recovery guidelines and local trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows: Jr. Volleyball - \$100 per resident participant or \$110 for nonresident participants (\$5 discount for each additional family member) Youth Basketball - \$111 per participant or \$122 per nonresident participant (\$5 discount for each additional family member) T-Ball - \$100 per resident participant or \$110 for nonresident participant (\$5 discount for each additional family member) \$11 late fee per participant or family	The City Manager or Designee may set and change Youth Sports Fees according to cost recovery guidelines and local trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows: Jr. Volleyball - \$104 per resident participant or \$114 for nonresident participants (\$5 discount for each additional family member) Youth Basketball - \$115 per participant or \$126 per nonresident participant (\$5 discount for each additional family member) T-Ball - \$104 per resident participant or \$114 for nonresident participant (\$5 discount for each additional family member) \$11 late fee per participant or family

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
RECREATION (continued)			
24-103	CONTRACT RECREATION CLASSES	<p>City Contract Instructors receive 70% of the class fee and the City receives the remaining 30% for off-site classes and/or existing instructors.</p> <p>City Contract Instructors receive 60% of the class fee and the City receives the remaining 40% for on-site classes and/or new instructors.</p>	<p>City Contract Instructors receive 70% of the class fee and the City receives the remaining 30% for off-site classes and/or existing instructors.</p> <p>City Contract Instructors receive 60% of the class fee and the City receives the remaining 40% for on-site classes and/or new instructors.</p>
24-104	CITY SPECIAL EVENTS	<p>The City Manager or Designee may set and change Special Events according to cost recovery guidelines and local trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows:</p> <p>1st Banner Position - No charge Additional Banner Positions - \$58 each per week according to policy</p> <p>A temporary banner removal fee of \$30 will be charged if banner is left up more than one day after the event.</p>	<p>The City Manager or Designee may set and change Special Events according to cost recovery guidelines and local trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows:</p> <p>1st Banner Position - No charge Additional Banner Positions - \$60 each per week according to policy</p> <p>A temporary banner removal fee of \$31 will be charged if banner is left up more than one day after the event.</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
RECREATION (continued)			
24-104	CITY SPECIAL EVENTS (continued)	<p>Cruise Night: \$30 per car during pre-registration \$45 per car the night of the event</p> <p>Craft Faire \$69 per inside space for residents \$85 per inside space for nonresidents \$59 per outside space for residents \$75 per outside space for nonresidents</p> <p>Father/Daughter Dance: \$36 per couple for residents \$41 per couple for nonresidents + \$5 for each additional daughter</p> <p>Booth Fee (Booths allowed in accordance with City policy at other City-run events) \$0 Nonprofit vendors \$70 For Profit Vendors</p> <p>Other Special Events: Fully allocated cost of required personnel</p>	<p>Cruise Night: \$30 per car during pre-registration \$45 per car the night of the event</p> <p>Craft Faire \$69 per inside space for residents \$85 per inside space for nonresidents \$59 per outside space for residents \$75 per outside space for nonresidents</p> <p>Father/Daughter Dance: \$37 per couple for residents \$43 per couple for nonresidents + \$5 for each additional daughter</p> <p>Booth Fee (Booths allowed in accordance with City policy at other City-run events) \$0 Nonprofit vendors \$72 For Profit Vendors</p> <p>Other Special Events: Fully allocated cost of required personnel</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
RECREATION (continued)			
24-145	SPECIAL EVENT PERMIT	Private Property 1-99 attendees - \$263 per application (subsidized) 100+ attendees - \$845 per application Public Property 1-99 attendees - \$1,156 per application 100+ attendees - \$3,368 per application Still Photography - \$48 per application Film Permit - \$375 per application Plus actual costs as necessary as determined by staff.	Private Property 1-99 attendees - \$272 per application (subsidized) 100+ attendees - \$872 per application Public Property 1-99 attendees - \$1,194 per application 100+ attendees - \$3,479 per application Still Photography - \$49 per application Film Permit - \$387 per application Plus actual costs as necessary as determined by staff.
24-105	TRIPS AND TOURS	Charge the direct cost of the trip	Charge the direct cost of the trip
24-148	ADVERTISING	The City Manager or designee may set and change Advertising Fees according to cost recovery guidelines and local market trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows: \$134 1/8 Page Ad \$211 1/4 Page Ad \$314 1/2 Page Ad \$262 Banner Ad \$591 Full Page Ad \$848 Inside Back Cover \$848 Inside Front Cover \$1,542 Back Cover	The City Manager or designee may set and change Advertising Fees according to cost recovery guidelines and local market trends. This authorization is intended to allow the Recreation Division to offer new and revised programs between fee updates. Current Fees are as follows: \$150 1/8 Page Ad \$225 1/4 Page Ad \$335 1/2 Page Ad \$275 Banner Ad \$625 Full Page Ad \$850 Inside Back Cover \$850 Inside Front Cover \$1,545 Back Cover

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Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PAVILION			
24-138	PAVILION CLEANING FEE	<p>Security Deposit: All special events require a \$453 security deposit.</p> <p>Security Guards: All events where alcohol is served require one guard per 100 people. \$25+ actual cost of security service (minimum of 4 hours)</p> <p>Application Fee: \$6 each</p> <p>Cleaning Fee: \$25 + contract cleaning charge + any repair costs for damage to the facility + fully allocated hourly rate of City personnel</p> <p>Cleaning Fee will be applied at the discretion of the City Manager or Designee. (In general it will be required for all rentals where food and/or beverages are served, for all day Saturday rentals and other large events where a cleaning crew is required.)</p>	<p>Security Deposit: All special events require a \$468 security deposit.</p> <p>Security Guards: All events where alcohol is served require one guard per 100 people. \$26+ actual cost of security service (minimum of 4 hours)</p> <p>Application Fee: \$7 each</p> <p>Cleaning Fee: \$26 + contract cleaning charge + any repair costs for damage to the facility + fully allocated hourly rate of City personnel</p> <p>Cleaning Fee will be applied at the discretion of the City Manager or Designee. (In general it will be required for all rentals where food and/or beverages are served, for all day Saturday rentals and other large events where a cleaning crew is required.)</p>
24-106	PAVILION RENTAL	<p>Rotary Room: Weekdays: \$52 per hour for residents \$58 per hour for nonresidents/commercial \$43 per hour for non-profits</p>	<p>Rotary Room: Weekdays: \$53 per hour for residents \$60 per hour for nonresidents/commercial \$44 per hour for non-profits</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PAVILION (continued)			
24-106	PAVILION RENTAL (continued)	<p>Gronstrand Room:</p> <p>Weekdays: \$45 per hour for residents \$52 per hour for nonresidents/commercial \$37 per hour for non-profits</p> <p>Evenings and Sundays: \$58 per hour for residents \$64 per hour for nonresidents/commercial \$37 per hour for non-profits</p> <p>Community Room:</p> <p>Weekdays: \$39 per hour for residents \$39 per hour for nonresidents/commercial \$31 per hour for non-profits</p> <p>Evenings and Sundays: \$45 per hour for residents \$45 per hour for nonresidents/commercial \$31 per hour for non-profits</p>	<p>Gronstrand Room:</p> <p>Weekdays: \$47 per hour for residents \$53 per hour for nonresidents/commercial \$38 per hour for non-profits</p> <p>Evenings and Sundays: \$60 per hour for residents \$67 per hour for nonresidents/commercial \$38 per hour for non-profits</p> <p>Community Room:</p> <p>Weekdays: \$40 per hour for residents \$40 per hour for nonresidents/commercial \$32 per hour for non-profits</p> <p>Evenings and Sundays: \$47 per hour for residents \$47 per hour for nonresidents/commercial \$32 per hour for non-profits</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PAVILION (continued)			
24-106	PAVILION RENTAL (continued)	<p>Kitchen: Weekdays: \$58 per hour for residents \$64 per hour for nonresidents/commercial \$31 per hour for non-profits</p> <p>Evenings and Sundays: \$71 per hour for residents \$77 per hour for nonresidents/commercial \$31 per hour for non-profits</p> <p>Great Room: Weekdays: \$91 per hour for residents \$103 per hour for nonresidents/commercial \$73 per hour for non-profits</p> <p>Great Room: Evenings and Sundays: \$122 per hour for residents \$143 per hour for nonresidents/commercial \$73 per hour for non-profits</p> <p>Combined: (Includes Great Room, Community Room, Kitchen and Lobby, Saturday Only) \$2,495 per day + \$225 cleaning fee for residents \$3,141 per day + \$225 cleaning fee for nonresidents/commercial</p>	<p>Kitchen: Weekdays: \$60 per hour for residents \$67 per hour for nonresidents/commercial \$32 per hour for non-profits</p> <p>Evenings and Sundays: \$73 per hour for residents \$80 per hour for nonresidents/commercial \$32 per hour for non-profits</p> <p>Great Room: Weekdays: \$94 per hour for residents \$107 per hour for nonresidents/commercial \$76 per hour for non-profits</p> <p>Great Room: Evenings and Sundays: \$126 per hour for residents \$147 per hour for nonresidents/commercial \$76 per hour for non-profits</p> <p>Combined: (Includes Great Room, Community Room, Kitchen and Lobby, Saturday Only) \$3,690 per day + \$225 cleaning fee for residents \$4,110 per day + \$225 cleaning fee for nonresidents/commercial</p>

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Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PAVILION (continued)			
24-106	PAVILION RENTAL (continued)	<p>\$73 per hour, 12 hour min for non-profits (Great Room only), additional fees apply for use of any other rooms</p> <p>Lakeside Room: \$45 per hour for residents \$45 per hour for nonresidents/commercial \$31 per hour for non-profits</p>	<p>\$76 per hour, 12 hour min for non-profits (Great Room only), additional fees apply for use of any other rooms</p> <p>Lakeside Room: \$47 per hour for residents \$47 per hour for nonresidents/commercial \$32 per hour for non-profits</p>
24-139	PAVILION EQUIPMENT RENTALS	<p>Non-profit organizations may receive a 50% discount on equipment rental fees. Upon approval of the City Manager or Designee, non-profit organizations that have ongoing rental agreements with the Pavilion on the Lake and have made significant donations to the City facilities are eligible to receive a full waiver of rental items.</p> <p>Gazebo Chairs: \$1.90 per chair + \$45 set-up fee Stage: \$13 per 4' x 8' piece Podium: \$25 per day Sound System: \$129 per day Portable Projector Screens: \$19 per day Electric Projector Screens: \$33 per day LCD Projector: \$129 per day Lattice Screen: \$33 each without lights \$64 each with lights Mirrors: \$2 each Candleholders: \$1 each Wireless Internet: \$33 per day</p>	<p>Non-profit organizations may receive a 50% discount on equipment rental fees. Upon approval of the City Manager or Designee, non-profit organizations that have ongoing rental agreements with the Pavilion on the Lake and have made significant donations to the City facilities are eligible to receive a full waiver of rental items.</p> <p>Gazebo Chairs: \$2 per chair + \$47 set-up fee Stage: \$13 per 4' x 8' piece Podium: \$26 per day Sound System: \$133 per day Portable Projector Screens: \$20 per day Electric Projector Screens: \$34 per day LCD Projector: \$133 per day Lattice Screen: \$34 each without lights \$67 each with lights Mirrors: \$2 each Candleholders: \$1 each Wireless Internet: \$34 per day</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PAVILION (continued)			
24-140	GAZEBO RENTALS	\$201 per day	\$207 per day
24-141	RANGER HOUSE RENTALS RANGER HOUSE RENTALS-ZOO ROOM	\$39 per hour for residents \$39 per hour for nonresidents/commercial \$31 per hour for non-profit	\$40 per hour for residents \$40 per hour for nonresidents/commercial \$32 per hour for non-profit

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
COLONY PARK COMMUNITY CENTER			
24-150	YOUTH & TEEN SERVICES	Teen Center membership - \$20 per year Teen Center membership card replacement - \$2 per card Teen Center Summer Club - \$106 per week	Teen Center membership - \$20 per year Teen Center membership card replacement - \$2 per card Teen Center Summer Club - \$106 per week
24-106A	COLONY PARK COMMUNITY CENTER RENTAL	Non-refundable Deposit: All bookings require a 50% non-refundable deposit. Cancellations will forfeit the deposit Security Deposit: May be required at the discretion of the City Manager or Designee (refundable after event if no damages/extra charges apply). Security Guards: At the discretion of the City Manager or Designee, events require one guard per 100 people. \$25 + actual cost of security service Additional Staff Time: An additional hourly rental charge of \$25 per hour will apply if the City is required to schedule additional personnel in order to accommodate the event Fitness (Dance & Exercise Rooms Combined): Weekdays: \$56 per hour for residents \$62 per hour for nonresidents \$47 per hour for non-profits	Non-refundable Deposit: All bookings require a 50% non-refundable deposit. Cancellations will forfeit the deposit Security Deposit: May be required at the discretion of the City Manager or Designee (refundable after event if no damages/extra charges apply). Security Guards: At the discretion of the City Manager or Designee, events require one guard per 100 people. \$26 + actual cost of security service Additional Staff Time: An additional hourly rental charge of \$26 per hour will apply if the City is required to schedule additional personnel in order to accommodate the event Fitness (Dance & Exercise Rooms Combined): Weekdays: \$58 per hour for residents \$64 per hour for nonresidents \$49 per hour for non-profits

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
COLONY PARK COMMUNITY CENTER (continued)			
24-106A	COLONY PARK COMMUNITY CENTER RENTAL (continued)	<p>Fitness (Dance & Exercise Rooms Combined): Evenings, Saturdays and Sundays: \$74 per hour for residents \$80 per hour for nonresidents \$64 per hour for non-profits</p> <p>Conference Room: Weekdays: \$38 per hour for residents \$43 per hour for nonresidents \$29 per hour for non-profits</p> <p>Evenings, Saturdays and Sundays: \$56 per hour for residents \$62 per hour for nonresidents \$47 per hour for non-profits</p> <p>Gymnasium: Weekdays: \$70 per hour for residents \$88 per hour for nonresidents \$61 per hour for non-profits</p> <p>Evenings, Saturdays and Sundays: \$88 per hour for residents \$105 per hour for nonresidents \$78 per hour for non-profits</p> <p>Arts and Crafts Room: Weekdays: \$43 per hour for residents \$50 per hour for nonresidents \$35 per hour for non-profits</p>	<p>Fitness (Dance & Exercise Rooms Combined): Evenings, Saturdays and Sundays: \$76 per hour for residents \$83 per hour for nonresidents \$66 per hour for non-profits</p> <p>Conference Room: Weekdays: \$39 per hour for residents \$45 per hour for nonresidents \$30 per hour for non-profits</p> <p>Evenings, Saturdays and Sundays: \$58 per hour for residents \$64 per hour for nonresidents \$49 per hour for non-profits</p> <p>Gymnasium: Weekdays: \$72 per hour for residents \$91 per hour for nonresidents \$63 per hour for non-profits</p> <p>Evenings, Saturdays and Sundays: \$91 per hour for residents \$108 per hour for nonresidents \$81 per hour for non-profits</p> <p>Arts and Crafts Room: Weekdays: \$45 per hour for residents \$51 per hour for nonresidents \$36 per hour for non-profits</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
COLONY PARK COMMUNITY CENTER (continued)			
24-106A	COLONY PARK COMMUNITY CENTER RENTAL (continued)	Evenings, Saturdays and Sundays: \$62 per hour for residents \$68 per hour for nonresidents \$53 per hour for non-profits Cleaning Fee: \$25 + contract cleaning charge + any repair costs for damage to the facility + fully allocated hourly rate of City personnel	Evenings, Saturdays and Sundays: \$64 per hour for residents \$70 per hour for nonresidents \$55 per hour for non-profits Cleaning Fee: \$26 + contract cleaning charge + any repair costs for damage to the facility + fully allocated hourly rate of City personnel

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS			
24-106B	COMMUNITY CENTER CLEANING FEE	Cleaning Fee will be applied at the discretion of the City Manager or Designee. (In general it will be required for all rentals where food and/or beverages are served, for all day Saturday rentals and other large events where a cleaning crew is required.)	Cleaning Fee will be applied at the discretion of the City Manager or Designee. (In general it will be required for all rentals where food and/or beverages are served, for all day Saturday rentals and other large events where a cleaning crew is required.)
24-106C	COLONY PARK COMMUNITY CENTER EQUIPMENT RENTALS	Table and chair set up (groups of 50+): \$50 Scoreboard: \$31 per day Podium: \$31 per day TV/DVD: \$31 per day Sound system: \$124 per day Stage: \$12 per 4' x 8' piece Portable projector screen: \$25 per day Coffee service: \$3 per person (10 person min.)	Table and chair set up (groups of 50+): \$51 Scoreboard: \$32 per day Podium: \$32 per day TV/DVD: \$32 per day Sound system: \$128 per day Stage: \$12 per 4' x 8' piece Portable projector screen: \$26 per day Coffee service: \$3 per person (10 person min.)

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-160	CITY HALL RENTALS	<p>Public Meeting Room (M-F 8:00-5:00): \$30 per hour for non-profit \$51 per hour for private resident \$57 per hour for private nonresident If outside of business hours: + Fully allocated hourly rate of all City personnel required \$55 per event cleaning fee for events that serve food</p> <p>City Council Chambers (M-F 8:00-5:00) 2 hour minimum rental \$108 per hour for non-profit \$139 per hour for private resident \$152 per hour for private nonresident \$575 non-refundable security deposit and a separate cleaning fee are required for events that serve food and/or drinks or are longer than 2 hours</p> <p>City Council Chambers (Friday Evenings) 2 hour minimum rental \$472 per hour for non-profit \$575 per hour for private resident \$632 per hour for private non-resident \$575 non-refundable security deposit and a separate cleaning fee are required for events that serve food and/or drinks or are longer than 2 hours</p>	<p>Public Meeting Room (M-F 8:00-5:00): \$31 per hour for non-profit \$52 per hour for private resident \$59 per hour for private nonresident If outside of business hours: + Fully allocated hourly rate of all City personnel required \$57 per event cleaning fee for events that serve food</p> <p>City Council Chambers (M-F 8:00-5:00) 2 hour minimum rental \$112 per hour for non-profit \$144 per hour for private resident \$157 per hour for private nonresident \$594 non-refundable security deposit and a separate cleaning fee are required for events that serve food and/or drinks or are longer than 2 hours</p> <p>City Council Chambers (Friday Evenings) 2 hour minimum rental \$487 per hour for non-profit \$594 per hour for private resident \$653 per hour for private non-resident \$594 non-refundable security deposit and a separate cleaning fee are required for events that serve food and/or drinks or are longer than 2 hours</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-160	CITY HALL RENTALS (continued)	City Council Chambers (Saturday & Sunday) \$3,953 per day for non-profit \$5,962 per day for private resident \$6,558 per day for private non-resident \$595 per hour in excess of 10 hours \$1,193 reservation deposit required \$109 per event cleaning fee for events that serve food and/or drinks	City Council Chambers (Saturday & Sunday) \$4,091 per day for non-profit \$6,158 per day for private resident \$6,774 per day for private non-resident \$615 per hour in excess of 10 hours \$1,232 reservation deposit required \$112 per event cleaning fee for events that serve food and/or drinks
		Event Photography (Saturday & Sunday) 2 hour minimum \$189 per hour for private resident \$253 per hour for private nonresident	Event Photography (Saturday & Sunday) 2 hour minimum \$195 per hour for private resident \$262 per hour for private nonresident
		Outdoor event Ceremony (Saturday & Sunday) \$443 per ceremony	Outdoor event Ceremony (Saturday & Sunday) \$458 per ceremony

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-107A	PARK RENTALS	<p>In case of inclement weather, the applicant may request a refund of usage fees subject to an administrative fee or reschedule the reservation date subject to a reservation modification fee.</p> <p>In addition to the base rental rate listed below, all park facility charges are also subject to the following charges as applicable:</p> <p style="padding-left: 20px;">\$19 Reservation change or modification fee</p> <p style="padding-left: 20px;">\$15 Use of utilities fee</p> <p>Security Guards: At discretion of City Manager or Designee, events where alcohol is served require one guard per 100 people. \$25 + actual cost of security service</p> <p>Fully allocated hourly rate of all City personnel required for the event will be charged</p>	<p>In case of inclement weather, the applicant may request a refund of usage fees subject to an administrative fee or reschedule the reservation date subject to a reservation modification fee.</p> <p>In addition to the base rental rate listed below, all park facility charges are also subject to the following charges as applicable:</p> <p style="padding-left: 20px;">\$20 Reservation change or modification fee</p> <p style="padding-left: 20px;">\$15 Use of utilities fee</p> <p>Security Guards: At discretion of City Manager or Designee, events where alcohol is served require one guard per 100 people. \$26 + actual cost of security service</p> <p>Fully allocated hourly rate of all City personnel required for the event will be charged</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-107A	PARK RENTALS (continued)	<p>Barbeque Areas: \$68 per day for Paloma BBQ Areas \$68 per day for Lake Park BBQ Areas \$37 per day for Colony Park BBQ Areas \$93 per day for all 3 Colony Park BBQ areas</p> <p>Lake Park Bandstand: \$61 for nonprofits \$102 for all others</p> <p>Faces of Freedom Veterans Memorial: \$88 per day No fee for veteran's organizations, individual veterans, or families of veterans for services and events. No security deposit will be required for these events.</p> <p>Sunken Gardens: \$197 per day for non-profit \$463 per day for all others</p> <p>Plaza at La Plaza: \$197 per day for non-profit \$463 per day for all others</p> <p>Equestrian Arena: \$124 per day private use \$244 security deposit</p>	<p>Barbeque Areas: \$70 per day for Paloma BBQ Areas \$70 per day for Lake Park BBQ Areas \$38 per day for Colony Park BBQ Areas \$96 per day for all 3 Colony Park BBQ areas</p> <p>Lake Park Bandstand: \$63 for nonprofits \$106 for all others</p> <p>Faces of Freedom Veterans Memorial: \$91 per day No fee for veteran's organizations, individual veterans, or families of veterans for services and events. No security deposit will be required for these events.</p> <p>Sunken Gardens: \$110 per day for half park for non-profit \$220 per day for half park for all others \$260 per day for full park for non-profit \$520 per day for full park for all others</p> <p>Plaza at La Plaza: \$215 per day for non-profit \$479 per day for all others</p> <p>Equestrian Arena: \$128 per day private use \$252 security deposit</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-107A	PARK RENTALS (continued)	Lake Park Special Event: \$585 per day for non-profits \$927 per day for others Stadium Park: \$878 per day for non-profits for a > 150 person event \$1,854 per day for all others for a >150 person event \$248 per day for non-profits for a <= 150 person event \$618 per day for all others for a <= 150 person event Paloma Creek Park Horseshoe Pits: \$16 per hour (2 hour minimum) Paloma Creek Park Sand Volleyball Court: \$16 per hour (2 hour minimum) Colony Park Bocce Ball Courts: \$16 per hour (2 hour minimum) Colony Park Pickleball Courts: \$16 per hour per court \$238 all four courts for the day Colony Park Outdoor Basketball Courts: \$16 per hour Corn Hole Board Set Rental With Bags: \$36 per day plus \$115 refundable security deposit	Lake Park Special Event: \$605 per day for non-profits \$957 per day for others Stadium Park: \$909 per day for non-profits for a > 150 person event \$1,915 per day for all others for a >150 person event \$256 per day for non-profits for a <= 150 person event \$638 per day for all others for a <= 150 person event Paloma Creek Park Horseshoe Pits: \$16 per hour (2 hour minimum) Paloma Creek Park Sand Volleyball Court: \$16 per hour (2 hour minimum) Colony Park Bocce Ball Courts: \$16 per hour (2 hour minimum) Colony Park Pickleball Courts: \$16 per hour per court \$245 all four courts for the day Colony Park Outdoor Basketball Courts: \$16 per hour Corn Hole Board Set Rental With Bags: \$37 per day plus \$119 refundable security deposit

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-107	BALLFIELD/PARK FACILITY RENTAL	Ballfield and Open Fields fees: in addition to in-kind contributions \$31 per hour for field \$25 per hour for lights \$31 base rental per field (+ \$500 deposit) \$62 for field lining (one time per day)	Ballfield and Open Fields fees: in addition to in-kind contributions \$22 per hour for non-profits \$27 per hour for resident use \$32 per hour for formal resident use \$35 per hour for non-resident \$26 per hour for lights \$32 base rental per field (+ \$500 deposit) \$64 for field lining (one time per day)

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
PARKS & FACILITIES RENTALS (continued)			
24-107B	BALLFIELD FACILITY TOURNAMENT RENTAL	<p>A Non-refundable deposit of 50% required on all bookings (unless a higher deposit is noted). There are no refunds due to bad weather.</p> <p>In addition to the rental rate listed below, all tournaments are also subject to the following charges as applicable:</p> <p>Fully allocated hourly rate of all City personnel required for the event will be charged \$25 per hour for lights \$31 per field per day base rental fee (+\$500 deposit) \$62 facility key replacement fee \$62 field lining fee (one time per day)</p> <p>In addition to in-kind contributions rental fees will be as follows: \$31 per hour per field or \$494 per day (12 hours max) for two fields \$865 for two days (24 hours max) for two fields</p> <p>Any rental of fields that is 5 or more hours will be treated as a Tournament and Tournament fees and policies will apply.</p>	<p>A Non-refundable deposit of 50% required on all bookings (unless a higher deposit is noted). There are no refunds due to bad weather.</p> <p>In addition to the rental rate listed below, all tournaments are also subject to the following charges as applicable:</p> <p>Fully allocated hourly rate of all City personnel required for the event will be charged \$26 per hour for lights \$32 per field per day base rental fee (+\$500 deposit) \$64 facility key replacement fee \$64 field lining fee (one time per day)</p> <p>In addition to in-kind contributions rental fees will be as follows: \$32 per hour per field or \$510 per day (12 hours max) for two fields \$893 for two days (24 hours max) for two fields</p> <p>Any rental of fields that is 5 or more hours will be treated as a Tournament and Tournament fees and policies will apply.</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
ZOO			
24-108	ZOO SERVICES	<p>Admissions: \$13 General (13 and up) \$11 Senior (65 and up) \$8 Child (5-12) \$5 Child (3-4)</p> <p>Military Day at the Charles Paddock Zoo - One dedicated day will be chosen during the year to offer "FREE Admission" for Active Military and their families. In the past, this day has been referred to as Armed Forces Day.</p> <p>Stroller Rental: \$5 per day - basic \$6 per day - theme</p> <p>Educational Programs: fees set by Zoo Director based on market conditions and cost of items being resold</p> <p>School Presentations, Camps, Special Programs: fees set by the Zoo Director based on market conditions and estimated variable costs of the program.</p> <p>Birthday parties: \$11-\$16 per child, based on market conditions and costs of items included</p> <p>Zoo Asset Sales: fees set by the Zoo Director, based on market conditions.</p> <p>Zoo Concessions, Vending & Gifts: fees set by the Zoo Director, based on market conditions and cost of items being resold.</p>	<p>Admissions: \$13 General (13 and up) \$11 Senior (65 and up) \$8 Child (5-12) \$5 Child (3-4)</p> <p>Military Day at the Charles Paddock Zoo - One dedicated day will be chosen during the year to offer "FREE Admission" for Active Military and their families. In the past, this day has been referred to as Armed Forces Day.</p> <p>Stroller Rental: \$5 per day - basic \$6 per day - theme</p> <p>Educational Programs: fees set by Zoo Director based on market conditions and cost of items being resold</p> <p>School Presentations, Camps, Special Programs: fees set by the Zoo Director based on market conditions and estimated variable costs of the program.</p> <p>Birthday parties: \$11-\$16 per child, based on market conditions and costs of items included</p> <p>Zoo Asset Sales: fees set by the Zoo Director, based on market conditions.</p> <p>Zoo Concessions, Vending & Gifts: fees set by the Zoo Director, based on market conditions and cost of items being resold.</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
ZOO (continued)			
24-108	ZOO GARDEN EVENT CENTER	<p>Zoo Garden Event Center:</p> <p>In case of inclement weather, the applicant may request a refund of usage fees subject to an administrative fee or reschedule the reservation date subject to a reservation modification fee.</p> <p>Security Deposit: A Security Deposit may be required.</p> <p>Security Guards: At the discretion of the City Manager or designee, events require one guard per 100 people. \$25+ actual cost of security service (minimum of 4 hours)</p> <p>Weekdays: \$48 per hour for residents \$53 per hour for nonresidents/commercial \$40 per hour for non-profits</p> <p>Evenings* and Weekends: \$58 per hour for residents \$69 per hour for nonresidents/commercial \$40 per hour for non-profits</p> <p>Equipment (per rental) \$122 Sound System Rental \$31 Wi-Fi</p> <p style="font-size: small;">* Evenings begin at 5 p.m.</p>	<p>Zoo Garden Event Center:</p> <p>In case of inclement weather, the applicant may request a refund of usage fees subject to an administrative fee or reschedule the reservation date subject to a reservation modification fee.</p> <p>Security Deposit: A Security Deposit may be required.</p> <p>Security Guards: At the discretion of the City Manager or designee, events require one guard per 100 people. \$26+ actual cost of security service (minimum of 4 hours)</p> <p>Weekdays: \$49 per hour for residents \$55 per hour for nonresidents/commercial \$41 per hour for non-profits</p> <p>Evenings* and Weekends: \$60 per hour for residents \$71 per hour for nonresidents/commercial \$41 per hour for non-profits</p> <p>Equipment (per rental) \$126 Sound System Rental \$32 Wi-Fi</p> <p style="font-size: small;">* Evenings begin at 5 p.m.</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
ZOO (continued)			
24-108A	ZOO GARDEN EVENT CENTER (continued)	<p>Additional Staff Time: An additional hourly rental charge of \$25 per hour will apply if the City is required to schedule additional personnel in order to accommodate the event</p> <p>Cleaning Fee: \$25 + contract cleaning charge + any repair costs for damage to the facility + fully allocated hourly rate of City personnel</p> <p>Cleaning Fee will be applied at the discretion of the City Manager or Designee. (In general it will be required for all rentals where food and/or beverages are served, for all day Saturday rentals and other large events where a cleaning crew is required.)</p> <p>Electricity is included in the rental fee. Tables, chairs, and restroom facilities are not included.</p>	<p>Additional Staff Time: An additional hourly rental charge of \$26 per hour will apply if the City is required to schedule additional personnel in order to accommodate the event</p> <p>Cleaning Fee: \$26 + contract cleaning charge + any repair costs for damage to the facility + fully allocated hourly rate of City personnel</p> <p>Cleaning Fee will be applied at the discretion of the City Manager or Designee. (In general it will be required for all rentals where food and/or beverages are served, for all day Saturday rentals and other large events where a cleaning crew is required.)</p> <p>Electricity is included in the rental fee. Tables, chairs, and restroom facilities are not included.</p>

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
BUSINESS LICENSES			
24-116	NEW BUSINESS LICENSE APPLICATION	\$90 per application Planning, Building, and Fire fees are separate	\$93 per application Planning, Building, and Fire fees are separate
24-118A	BUSINESS LICENSE REPRINT	\$37 per reprint	\$38 per reprint
24-119	SOLICITOR PERMIT	\$74 per permit plus \$11 per card	\$76 per permit plus \$11 per card
24-077	SPECIAL BUSINESS DOJ CHECK	\$243 per application plus any DOJ fees	\$251 per application plus any DOJ fees
24-067	BLUEPRINT/MAP REPRODUCTION	Actual cost of reproduction GIS printout fee based on actual time spent by staff Large building plan copy: \$5 per sheet	Actual cost of reproduction GIS printout fee based on actual time spent by staff Large building plan copy: \$5 per sheet

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
GENERAL			
24-115	DAMAGE TO CITY PROPERTY REPAIR	Charge the fully allocated hourly rates for all required personnel plus any material costs.	Charge the fully allocated hourly rates for all required personnel plus any material costs.
24-120	RETURNED CHECK PROCESSING	\$90 per NSF check	\$93 per NSF check
24-121	ELECTRONIC FILE COPY SERVICE	\$5 per device	\$5 per device
24-122	DOCUMENT CERTIFICATION	\$33 per document	\$34 per document
24-123	CANDIDATE/INITIATIVE FILING	<p>Candidate - \$25 per candidate</p> <p>Initiative - \$200 per initiative Fee is refundable to the filer, if within one year of filing the notice of intent, the elections official certifies the sufficiency of the petition.</p> <p>Fees are set by Sate Law</p>	<p>Candidate - \$25 per candidate</p> <p>Initiative - \$200 per initiative Fee is refundable to the filer, if within one year of filing the notice of intent, the elections official certifies the sufficiency of the petition.</p> <p>Fees are set by Sate Law</p>
24-124	RECORDS COMPILATION SERVICE	Charge the fully allocated hourly rates for all required personnel and any outside costs in accordance with Government Code section 6253.9.	Charge the fully allocated hourly rates for all required personnel and any outside costs in accordance with Government Code section 6253.9.

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
GENERAL (continued)			
24-125	DOCUMENT REPRODUCTION	Copying/Scanning/Faxing: Black & White: \$0.50 - 1st page \$0.10 - each additional page Color Copies: \$1 per page Fair Political Practices Commission copies - \$.10 per page Contract reproduction of documents: Actual cost of reproduction Additional \$5 per request for statements five or more years old	Copying/Scanning/Faxing: Black & White: \$0.50 - 1st page \$0.10 - each additional page Color Copies: \$1 per page Fair Political Practices Commission copies - \$.10 per page Contract reproduction of documents: Actual cost of reproduction Additional \$5 per request for statements five or more years old
24-127	CREDIT CARD PROCESSING	4.5% of the amount charged	4.5% of the amount charged

DRAFT FEE SCHEDULE

Ref #	Fee Name	2023 Fees (Effective 07/24/2023)	Proposed Fees
GENERAL (continued)			
24-142	MAILING NOTICES/LETTERS & LABELS	0-50 Labels: \$124 51-100 Labels: \$186 101-150 Labels: \$248 151+ Labels: \$309 0-50 Notices: \$93 51-100 Notices: \$155 101-150 Notices: \$216 151+ Notices: \$216 plus \$1 per item over 150 Plus actual cost of postage or other mailing fee	0-50 Labels: \$128 51-100 Labels: \$192 101-150 Labels: \$256 151+ Labels: \$320 0-50 Notices: \$96 51-100 Notices: \$160 101-150 Notices: \$224 151+ Notices: \$224 plus \$1 per item over 150 Plus actual cost of postage or other mailing fee
24-130A	ACTIVE NET REGISTRATION	Administrative fee associated with registering for an activity online through Active Net: Activity cost between \$0-\$10.99 - \$1.00 Activity cost between \$11.00-\$39.99 - \$1.10 Activity cost between \$40.00-\$199.99 - \$2.20 Activity cost \$200+ - \$11.00	Administrative fee associated with registering for an activity online through Active Net: Activity cost between \$0-\$10.99 - \$1.00 Activity cost between \$11.00-\$39.99 - \$1.10 Activity cost between \$40.00-\$199.99 - \$2.20 Activity cost \$200+ - \$11.00
24-131	DIRECTOR APPROVED FEE WAIVER	With the approval of the Administrative Services Director, staff would have the ability to waive certain fees that were incurred due to staff error.	With the approval of the Administrative Services Director, staff would have the ability to waive certain fees that were incurred due to staff error.
24-131A	WAIVER OF NOMINAL AMOUNTS	Waive nominal amounts up to \$25 that are due to the City or owed by the City to reduce administrative cost burden.	Waive nominal amounts up to \$25 that are due to the City or owed by the City to reduce administrative cost burden.



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item C1

Department: Community
Development
Date: 5/28/24
Placement: Management
Report

TO: JAMES R. LEWIS, CITY MANAGER

FROM: PHIL DUNSMORE, COMMUNITY DEVELOPMENT DIRECTOR

PREPARED BY: KELLY GLEASON, PLANNING MANAGER

SUBJECT: Request for Authorization for Amendments to Del Rio Ranch

RECOMMENDATION:

Council consider authorization for the applicant team to proceed with amendments to the General Plan Map, Zoning Map, Specific Plan, and Master Plan of Development (Use Permit) for the Del Rio Ranch project site to allow for an RV and glamping resort on the 25-acre site.

REPORT IN BRIEF:

A development concept has been submitted for a commercial RV and glamping resort on the Del Rio Ranch site at the south-east corner of Del Rio Road and El Camino Real. The concept includes 98 short-term RV sites, 79 glamping sites, 18 short-term rental units, and supporting commercial uses. The application would include a Specific Plan amendment and a General Plan map Amendment to change the sites' multi-family housing designation to a commercial designation.

At this time, the applicant team is seeking authorization to proceed with the current development concept and prepare and entitlement package for full analysis. The project details will be modified in response to input received from the community and from the City Council. An additional project review/check-in can occur at a later date if the applicant is authorized to proceed, at the discretion of the Council. Authorization to proceed does not endorse the project as proposed, but instead allows staff and Council to provide direction towards the completion of a formal application submittal which will undergo subsequent Planning Commission and City Council review at a later date.

Situation and Facts:

1. Applicant/ Owner:	Cal Coastal Communities, LLC
2. Project Addresses:	2055 El Camino Real
3. General Plan Designation:	General Commercial (GC) / High Density Residential (HDR)
4. Zoning District:	Commercial Retail (CR) / Residential Multi-Family (RMF-24) / Specific Plan #2 (SP2)
5. Site Area:	appx. 25-acres
6. Existing Use:	Vacant
7. Environmental Status:	Not yet determined – previously certified EIR

DISCUSSION:***BACKGROUND***

The City has received a request for an amendment (Specific Plan and possible General Plan) to modify the development concept and associated entitlements for the Del Rio Ranch Project.

The Del Rio Commercial Area Specific Plan was originally approved in 2012 and was subsequently amended in 2020. This amendment broadened the list of allowable uses on site and allowed for the site to be planned without a large-scale retailer. The primary intent of the amendments were to reduce the need for substantial traffic improvements at the Del Rio overpass by eliminating fuel stations and drive-through restaurants and assume a land use pattern that results in reduced traffic impacts with tiered improvement triggers based on traffic levels. The amendment also recognized that Walmart placed substantial deed restrictions on the property that prohibited most large retail users and a significant number of other land uses on the site.

In 2021, the council reviewed and approved a development concept that included the following land uses:

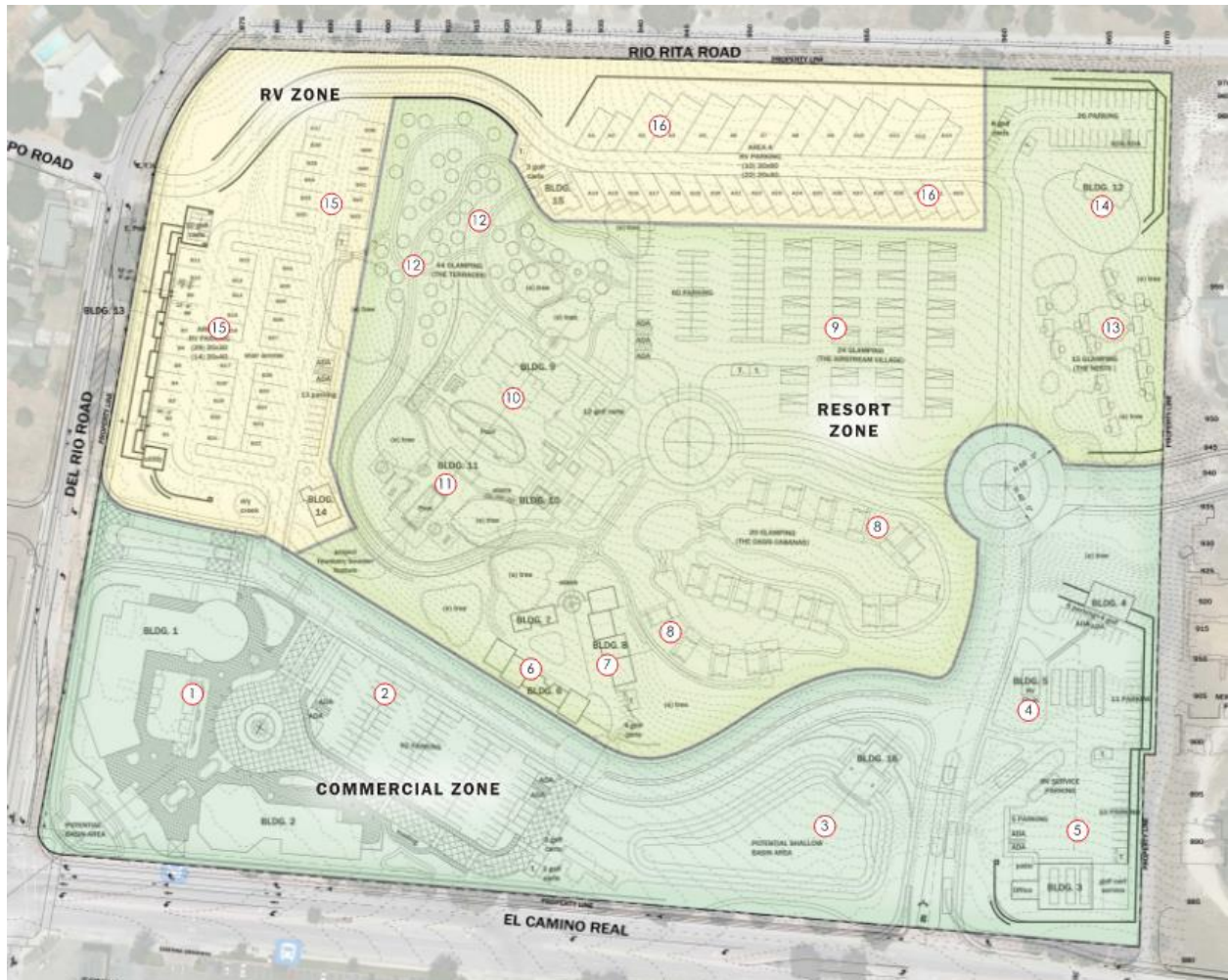
- 3.6 acres of multi-family residential acreage adjacent to Rio Rita Rd
- A tourist-serving resort including 4.25 acres of RV sites, 1.8 additional acres of glamping areas, and a 100-room hotel
- An amphitheater designed to accommodate performing arts, community events and small music venues with seating capacity for 300
- A 15,000 square-foot conference center
- A 30,000 square-foot entertainment center
- 24,000 square feet of mixed-use buildings
- A parking garage

Per the current Specific Plan requirements, RV uses are limited to 20% (5.7 acres) of the project site with an additional 1.8 acres allowed to accommodate related permanent cabins and glamping uses. Requirements also include screening from El Camino Real and integration into a full-site Master Plan of Development that includes other visitor serving uses.

Preliminary Proposed Project Concept

The current application proposes an RV resort on the entirety of the site with commercial oriented uses at the corner of Del Rio Road and El Camino Real. The applicants envision a higher-end resort model with numerous site amenities. The concept proposes Commercial Zoning for the entire site:

1. RV Area (appx 5.4 acres)
 - o 74 RV spaces (including 24 permanent airstream trailers)
2. Resort Area (appx 11 acres)
 - o 103 Glamping sites (ie. Cabins, modular units, yurt tents, etc)
 - o 18 short-term rental units
 - o Clubhouse
 - o 2 Pools
 - o Wellness and Fitness center
3. Commercial Area (appx 9.25 acres)
 - o On-site check-in and RV service center
 - o Outdoor event space
 - o Commercial retail/restaurant area



Considerations for the site concept include the following:

- 1) Ratio and location of land uses
- 2) Public Road alignment
- 3) Fiscal considerations
- 4) Aesthetics

1. Ratio and location of Land Uses

Under the current Specific Plan, the eastern portion of the site is dedicated to multi-family development to accommodate housing numbers that were illustrated in the General Plan Housing Element. This was a carry-over from the original site zoning proposed during the Walmart development. This zoning is proposed to be replaced with commercial with the General Plan update in favor of maximizing the commercial viability of the site. Additional multi-family sites and increased density is proposed on properties south of this site, as part of the city-wide update to ensure no net loss of housing site inventory. Should this project proceed ahead of the General plan update, this change would be made concurrent with this application.

The applicant is proposing a reduction in commercial building space in favor of an expanded resort concept. The conference center and outdoor amphitheater is replaced by expanded guest amenities and a less concentrated RV area to use the natural topography to the greatest extent and retain certain site features such as old growth tree groves. The RV area occupies about 5.4 acres of the site in two distinct areas: one bordering Rio Rita Road and one bordering Del Rio Road. This is a similar area to what is allowed under the Specific Plan however, the location has been modified to accommodate topography and access and reserve key natural areas of the site for the glamping portion of the resort.

The glamping and resort amenities occupy approximately 11 acres of the site and is located central to the property. This allows for minimized grading as access with RVs is no longer needed. This area provides several distinct glamping experiences including airstream rental units, units placed along a man-made water feature, units nestled in existing trees, a private villa lounge to host events, and a clubhouse building adjacent to 2 pools.

The portion of the site fronting El Camino Real and the intersection of ECR and Del Rio Road maintains a commercial focus with 2 commercial buildings envisioned to have a restaurant and/or entertainment type uses to serve guests as well as the general public and flexible parking and small-scale event space to allow for community pop-up events or private space rental. The site also accommodates an area for RV maintenance as an added amenity for guests and would be available to the general public.

2. Public Road Alignment

The original Walmart plan included a new public road near the south side of the property aligning with the driveway on El Camino Real at the south end of the Mission Oaks center. The new road is a critical connection to support added density for the future General Plan. The previous 2021 amendment relocated the public road align with Obispo Road (off Del Rio Road) as the connection point to southern properties. This alignment supported the separation of residential and commercial uses with that proposed concept, however, with the reimagining of the site, the

development concept is best served by returning to the original alignment at the south end of the site.

3. Fiscal considerations

The visitor-serving resort and accompanying uses will provide a major tourist draw, especially as a high quality, high amenity resort. All short-term rental spaces (RV and glamping) will be subject to Transient Occupancy Tax (TOT) and, generally, visitors to the city end up supporting local restaurants and retail stores during their stay. The elimination of residential uses on-site will also increase the fiscal positivity of the property.

Staff has provided direction to the applicant team to ensure that all RV spaces are equipped with full hook-ups and are large enough to accommodate landscaping between spaces. Refinement of RV space size and accessibility will be part of the review process if the application is authorized to proceed.

4. Aesthetics

The project site is within a major commercial node and compromises roughly half of the Del Rio Commercial Area Specific Plan. Views to and from the site will be a significant factor in the review process. The resort provides a park like setting for the glamping areas adjacent to the multi-family properties, allowing for reduced intensity in this transition area.

As an RV area is proposed directly adjacent to Del Rio Road in this concept, the applicants are proposing to buffer the more utilitarian RV parking area with the use of landscape wall features and a false building façade. The concept layout includes an approximately 17-foot setback from the final property line to the false façade (5-feet to the landscape wall in between). This setback will be vital to ensuring a quality appearance from adjacent commercial and residential neighborhoods.

Council Authorization and Processing

Should City Council authorize staff to process this application, the authorization does not signal support for the project, nor does it guarantee that such a project would be approved by the Planning Commission or City Council. An authorization is limited to the determination that the application warrants further review and that the general project description and scope could have substantial benefit to the Community at large. The authorization review also allows the City Council and community to offer feedback and comments towards a future application. The City Council may offer the applicant team specific direction about what components to include in the future application and general direction towards the project concept.

The proposed amendment to allow for expanded resort uses would add much needed commercial uses to the north end of town, consistent with the Council's economic development goals and community's desire to see more "things to do" in Atascadero. Therefore, the authorization to process the project appears consistent with overall City Council goals.

ALTERNATIVES TO THE STAFF RECOMMENDATION:

1. Council may authorize staff to process the proposed application, with neighborhood meeting and study session.
2. Council may direct staff to gather additional information on the proposed project and report back to the Council before taking action regarding processing.
3. Council may suggest that the amendment is not appropriate at this time nor in the immediate future and suggest that staff not consider processing the application.

FISCAL IMPACT:

If developed with lodging, retail and tourist-oriented uses, this site is likely to become a positive fiscal contribution to the City and may act as a catalyst to attract additional head of household jobs and other tax revenue supporting land uses within the Del Rio vicinity.

REVIEWED BY OTHERS:

This item has been reviewed by the Community Development Director.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. Applicant Design Concept Package



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

PROJECT DIRECTORY

CLIENT/APPLICANT: JENNIFER KIM
 ADDRESS: 6900 EL CAMINO REAL ATASCADERO, CA 93422
 EMAIL: JENKIMUSOC@GMAIL.COM
 PHONE: (213) 820-1282

ARCHITECT: EHD STUDIO, INC.
 ADDRESS: 5960 WEST MALL SUITE B ATASCADERO, CA 93422
 CONTACT: EDDIE HERRERA
 EMAIL: EDDIE@EHDDESIGNSTUDIO.COM
 PHONE: (805) 556-7997

BUILDER: AZTECA BUILDERS
 ADDRESS: 2151 OCEAN STREET OCEANO, CA 93445
 CONTACT: JAKE SANCHEZ
 EMAIL: JAKE@AZTECACONSTRUCTION.COM
 PHONE: (805) 705-8142

LANDSCAPE ARCHITECT: WALA
 ADDRESS: 5960 WEST MALL SUITE B ATASCADERO, CA 93422
 CONTACT: WES AROLA
 EMAIL: W@WESAROLA.COM
 PHONE: (831) 247-9936

CIVIL ENGINEER: WALLACE GROUP
 ADDRESS: 612 CLARION CT SAN LUIS OBISPO, CA 93401
 CONTACT: RACHEL HAWTHORNE
 EMAIL: RACHELH@WALLACEGROUP.US
 PHONE: (805) 544-4011

PROJECT DESCRIPTION

THE DEL RIO RANCH PROJECT, LOCATED AT THE INTERSECTION OF EL CAMINO REAL & DEL RIO ROAD, IS A +/- 28.5-ACRE SITE. THE OVERALL PROJECT IS ENVISIONED TO BECOME A "DESTINATION" VENUE THEMED AROUND AN RV AND CAMPSITE RESORT AND A KEY CORNER PIECE ANCHORING THE NORTHERN END OF ATASCADERO. THE VENUE IS DESIGNED TO EMBRACE ATASCADERO'S LOCAL COMMUNITY AND NATURAL SCENIC IDENTITY. THE PROJECT FOCUSES ON QUALITY OVERNIGHT STAY LODGING CAMPSITES AND FACILITIES THAT CAN SHARE COMMON INDOOR/OUTDOOR AMENITIES. THE SITE IS DESIGNED TO ENGAGE WITH THE SURROUNDING NATURAL TERRAIN AND MAJESTIC OAKS. COMPLIMENTARY COMMERCIAL, RETAIL, AND SERVICE BUILDING USES ARE PROPOSED ALONG EL CAMINO REAL AND DEL RIO ROAD TO CREATE SYNERGY BETWEEN THE SHARED PROJECT CAMPUS USES AND NEIGHBORING COMMERCIAL SITES.

THE CURRENT SITE IS COMPRISED OF EXISTING RURAL RANCH LAND PREVIOUSLY KNOWN AS THE "OLD" ATASCADERO WALMART SITE. THE NEW PROJECT WILL SERVE AS BOTH A "TEMPORARY" COMMUNITY FOR TRAVELING VISITORS, AS WELL AS A "PERMANENT" RESORT COMMUNITY DESTINATION FOR ATASCADERO'S RESIDENTS. WHILE VISITING DEL RIO RANCH, GUESTS' MEMBERS WILL ENJOY AN ABUNDANCE OF INDOOR & OUTDOOR AMENITIES SUCH AS THE FOLLOWING:

- RESORT CABANAS & WADING POOLS
- OUTDOOR WALKING, HIKING, AND GOLF CART PATHS
- COMMUNITY POOLS & SPAS
- INDOOR "CLUBHOUSE" LOUNGE AREAS
- OUTDOOR PLAZA & COURTYARD AREAS
- WELLNESS, SPA & FITNESS AMENITIES
- HOUSEKEEPING AND RV CAMPUS SERVICES
- COMMERCIAL & RETAIL USES
- OUTDOOR OPEN SPACE PARK/EVENT AREAS
- RV, CAMPING, GLAMPING, BNBS & OVERNIGHT LODGING

THE DEL RIO RANCH SITE IS THE IDEAL LOCATION FOR THIS "DESTINATION RESORT VENUE" BASED ON ITS PROXIMITY AND VISIBILITY FROM THE HIGHWAY 101 VIEW CORRIDOR. CURRENTLY THERE ARE MANY TRAVELERS DAILY THAT PASS BY THE SITE WHO WOULD ENJOY THE ATASCADERO COMMUNITY EXPERIENCE AND THE DEL RIO RANCH PROJECT. OUR GOAL IS TO PROVIDE A HIGH-QUALITY RESORT SETTING AND COMMUNITY EXPERIENCE FOR ALL GUESTS AND RESIDENTS OF ATASCADERO AND SAN LUIS OBISPO COUNTY TO ENJOY. THIS PROJECT WILL PROVIDE A BOOST TO THE OVERALL LOCAL ECONOMY BY CREATING NEW LOCAL JOBS AND TAX REVENUES FOR THE AREA.



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

PROJECT STATISTICS SUMMARY

PROJECT ADDRESS: 2115 EL CAMINO REAL ATASCADERO, CA 93422

LOT #: LOTS 6, 7, 7A, 8, 9, 10 & 11 IN BLOCK 22 OF THE ATASCADERO COLONY, IN THE CITY OF ATASCADERO, COUNTY OF SAN LUIS OBISPO, STATE OF CALIFORNIA
 CR (049-112-039, 049-112-036, 049-112-022, 049-112-018, 049-112-019, 049-112-002)
 MF10 (049-151-040, 049-151-041, 049-151-037, 049-151-036, 049-151-005)

APN #: 049-112-039, 049-112-036, 049-112-022, 049-112-018, 049-112-019, 049-112-002

LOT SIZE: 28.5 ACRES

BUILDING AREA BREAKDOWN

BUILDING 1: (3-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 12,000 SF SECOND/THIRD FLOOR: (BNBS) +/- 10,000 SF (10 UNITS)
BUILDING 2: (3-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 10,000 SF SECOND/THIRD FLOOR: (BNBS) +/- 8,000 SF (8 UNITS)
BUILDING 3: (1-STORY)	GROUND FLOOR: (AUTO REPAIR) +/- 5,800 SF W/ 3 SERVICE BAYS, GOLF CART SERVICE/STORAGE & OFFICE + 1,000 SF OUTDOOR AREA
BUILDING 4: (2-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 1,500 SF SECOND FLOOR: (MANAGER'S UNIT) +/- 1,200 SF
BUILDING 5: (1-STORY)	GROUND FLOOR: (RV CHECK-IN) +/- 600 SF
BUILDING 6: (1-STORY)	GROUND FLOOR: (HEALTH SPAS) +/- 3,200 SF
BUILDING 7: (1-STORY)	GROUND FLOOR: (HEALTH SPAS) +/- 950 SF
BUILDING 8: (2-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 3,000 SF SECOND FLOOR - (OTHER PERSONAL SERVICES) +/- 2,000 SF
BUILDING 9: (1-STORY) (2-POOLS)	GROUND FLOOR: +/- 3,200 SF POOL 1 - (SWIMMING POOLS) +/- 2,000 SF POOL 2 - (SWIMMING POOLS) +/- 1,000 SF
BUILDING 10: (1-STORY)	GROUND FLOOR: (BAR LOUNGE) +/- 400 SF
BUILDING 11: (1-STORY)	GROUND FLOOR: (BAR GROTTO) +/- 720 SF
BUILDING 12: (1-STORY)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 1,800 SF
BUILDING 13: (1-STORY)	GROUND FLOOR: (UTILITIES AN STORAGE) +/- 4,000 SF
BUILDING 14: (1-STORY)	GROUND FLOOR (RESTROOM): +/- 1,200 SF
BUILDING 15: (1-STORY)	GROUND FLOOR (RESTROOM): +/- 1,200 SF
BUILDING 16: (1-STORY)	GROUND FLOOR (STAGE): +/- 750 SF
TOTAL SF: (EXCLUSIVE OF POOL SF)	+/- 71,520 SF

SITE/UNIT INVENTORY

RV CAMPSITES: (HOOK-UPS)

AREA A - ALONG RIO RITA RD:
(22) 20'x40' SITES
(10) 30'x60' SITES

AREA B - ALONG DEL RIO RD:
(28) 20'x30' SITES
(14) 20'x40' SITES

THE AIRSTREAM VILLAGE:
(24) 20'x30' SITES

RV CAMPSITES TOTAL = 98

GLAMPING SITES:

THE OASIS:
(20) 15'x25' SITES

THE NESTS:
(15) 10'x20' SITES

THE TERRACES:
(44) 10'x20' SITES

GLAMPING SITES TOTAL = 79

177 SITES PROPOSED

BNBS: SHORT-TERM RENTAL UNITS: (18)

MANAGER'S UNIT: LONG-TERM MANAGER'S UNIT: (1)

TOTAL: 196 SITES/UNITS PROPOSED

PARKING REQUIRED & PROPOSED

BUILDING 1: (3-STORIES)	(GENERAL MERCHANDISE) 12,000 SF/300 SF = 40 REQ. (BNBS) 10 UNITS : 2 SPACES + 1/UNIT + 1/10 UNITS = 13 REQ.
BUILDING 2: (3-STORIES)	(GENERAL MERCHANDISE) 10,000 SF/300 SF = 33 REQ. (BNBS) 8 UNITS : 2 SPACES + 1/UNIT = 10 REQ.
BUILDING 3: (1-STORY)	(AUTO REPAIR) 3 SERVICE BAYS + 1,000 SF OUTDOOR AREA = 4 SPACES/ SERVICE BAY + 1/1,000 SF OF OUTDOOR ACTIVE AREA = 13 REQ.
BUILDING 4: (2-STORIES)	(GENERAL MERCHANDISE) 1,500 SF/300 SF = 5 REQ. (MANAGER'S UNIT) 1/UNIT = 1 REQ.
BUILDING 5: (1-STORY)	(OTHER SERVICES) 600 SF/500 SF = 1 REQ. RV CHECK-IN KIOSK
BUILDING 6: (1-STORY)	(HEALTH SPAS) 3,200 SF/300 SF = 11 REQ.
BUILDING 7: (1-STORY)	(HEALTH SPAS) 950 SF/300 SF = 4 REQ.
BUILDING 8: (2-STORIES)	(GENERAL MERCHANDISE) 3,000 SF/300 SF = 10 REQ. (OTHER PERSONAL SERVICES) 2,000 SF/500 SF = 4 REQ.
BUILDING 9: (1-STORY) (2-POOLS)	(SWIMMING POOLS) POOL 1 = 2,000 SF/100 SF = 20 REQ. (SWIMMING POOLS) POOL 2 = 1,000 SF/100 SF = 10 REQ.
BUILDING 12: (1-STORY)	(GENERAL MERCHANDISE) 1,800 SF/300 SF = 6 REQ.
GLAMPING SITES:	1 SPACE/SITE = 79 PROPOSED (OASIS, TERRACES AND NESTS)
PARKING REDUCTIONS	5% MOTORCYCLE REDUCTION + 5% BICYCLE REDUCTION (26 STALL REDUCTION) PER SECTION 9.4.115 (B) AND (C)
TOTAL PARKING REQ.	(263 - 26) = 233 PARKING SPACES REQUIRED
TOTAL PARKING PROPOSED	247 STANDARD PARKING SPACES PROPOSED
*REQUESTED PARKING REDUCTIONS	REFER TO SECTION 9.4.115 (E) AND (F) FOR ADDITIONAL PARKING REDUCTIONS AVAILABLE
RV SITES:	1 SPACE/SITE = 98 PROPOSED
GOLF CARTS:	40 GOLF CARTS PROPOSED
BLDGs. 10, 11, 13-16	STORAGE/UTILITY NO PARKING PROPOSED

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TOTAL SHEET COUNT 26

VICINITY MAP



TITLE SHEET

05/07/2024

T1

SCHEMATIC PACKAGE



BUILDING AREA BREAKDOWN

BUILDING 1: (3-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE +/- 12,000 SF SECOND/THIRD FLOOR: (BNBS) +/- 10,000 SF (10 UNITS)
BUILDING 2: (3-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 10,000 SF SECOND/THIRD FLOOR: (BNBS) +/- 8,000 SF (8 UNITS)
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BUILDING 4: (2-STORIES)	GROUND FLOOR: (GENERAL MERCHANDISE) +/- 1,500 SF SECOND FLOOR: (MANAGER'S UNIT) +/- 1,200 SF
BUILDING 5: (1-STORY)	GROUND FLOOR: (RV CHECK-IN) +/- 600 SF
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BUILDING 15: (1-STORY)	GROUND FLOOR (RESTROOM): +/- 1,200 SF
BUILDING 16: (1-STORY)	GROUND FLOOR (STAGE): +/- 750 SF
TOTAL SF: (EXCLUSIVE OF POOL SF)	+/- 71,520 SF

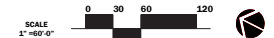
SITE/UNIT INVENTORY

RV CAMPSITES: (HOOK-UPS)	AREA A - ALONG RIO RITA RD: (2) 20'x40' SITES (3) 20'x80' SITES AREA B - ALONG DEL RIO RD: (28) 20'x30' SITES (4) 20'x40' SITES THE AIRSTREAM VILLAGE: (24) 20'x30' SITES RV CAMPSITES TOTAL = 98
GLAMPING SITES:	THE OASIS: (20) 15'x25' SITES THE NESTS: (65) 10'x20' SITES THE TERRACES: (44) 10'x20' SITES GLAMPING SITES TOTAL = 79
SUBTOTAL:	177 SITES PROPOSED
BNBS:	SHORT-TERM RENTAL UNITS: (18)
MANAGER'S UNIT:	LONG-TERM MANAGER'S UNIT: (1)
TOTAL:	196 SITES/UNITS PROPOSED



DEL RIO RANCH
2115 EL CAMINO REAL - ATASCADERO, CA 93422

ARCHITECTURAL SITE PLAN



A1
SCHEMATIC PACKAGE

05/07/2024



LEGEND

COMMERCIAL ZONE

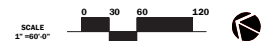
- ① THE VILLAGE COMMERCIAL PLAZA
- ② THE VILLAGE FLEX PARKING & EVENT LOT
- ③ LANDSCAPE BASIN & EVENT LAWN W/ STAGE
- ④ RV CHECK-IN & INFORMATION CENTER
- ⑤ GOLF CART/RV SERVICE & DETAIL CENTER

RESORT ZONE

- ⑥ THE COURTYARD SPA & WELLNESS CENTER
- ⑦ THE COURTYARD LAUNDRY & SERVICE CENTER
- ⑧ THE "OASIS" GLAMPING UNITS & WATER FEATURES
- ⑨ THE "AIRSTREAM VILLAGE" GLAMPING UNITS & PARKING
- ⑩ THE "CHATEAU" CLUBHOUSE & AMENITIES
- ⑪ THE "GROTTO" & PRIVATE BAR
- ⑫ THE "TERRACE" GLAMPING UNITS
- ⑬ THE "NEST" GLAMPING UNITS
- ⑭ THE "VILLA" PRIVATE LOUNGE & LAWN

RV ZONE

- ⑮ VEHICLE CAMPSITES (20x30 & 20x40)
- ⑯ VEHICLE CAMPSITES (20x40 & 30x60)



DEL RIO RANCH

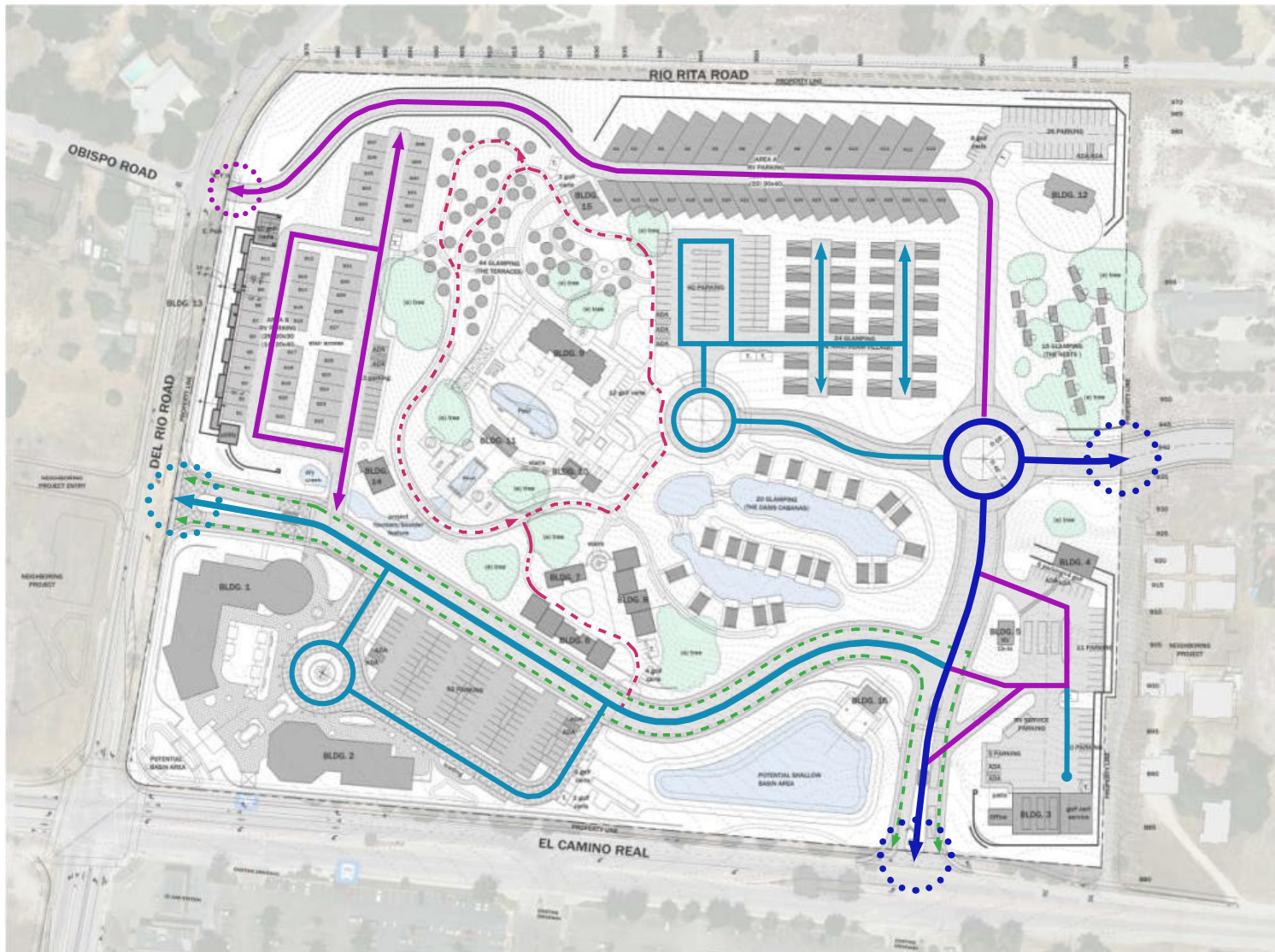
2115 EL CAMINO REAL - ATASCADERO, CA 93422

SITE ZONES EXHIBIT

05/07/2024

A2

SCHEMATIC PACKAGE

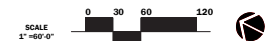


LEGEND

- █ TWO-WAY PUBLIC COLLECTOR ROAD
- █ TWO-WAY PRIVATE SITE ROAD
- █ ONE-WAY PRIVATE SITE ROAD
- - - GOLF CART & PEDESTRIAN ONLY
- - - BIKE LANES
- PUBLIC PROJECT ENTRY & EXIT
- PRIVATE PROJECT ENTRY & EXIT
- PRIVATE PROJECT EXIT ONLY



DEL RIO RANCH
2115 EL CAMINO REAL - ATASCADERO, CA 93422



VEHICLE CIRCULATION EXHIBIT

A3
SCHEMATIC PACKAGE

05/07/2024



LEGEND

- ADA PATH OF TRAVEL
- ⊙ ADA CONNECTION TO PUBLIC RIGHT-OF-WAY
- ▭ ADA DESIGNATED RAMP LOCATION



DEL RIO RANCH
2115 EL CAMINO REAL - ATASCADERO, CA 93422



ADA PATH OF TRAVEL EXHIBIT

05/07/2024

A4
SCHEMATIC PACKAGE



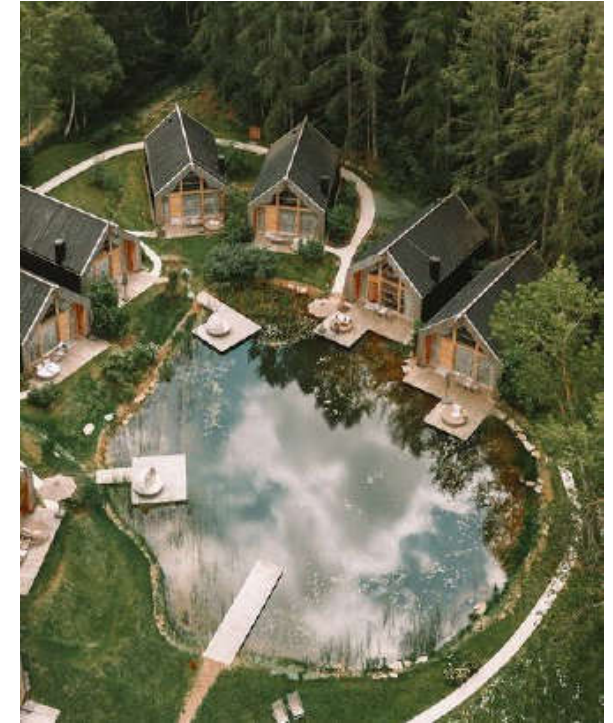
DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

MOOD BOARD - ARCHITECTURE

A5

05/07/2024
SCHEMATIC PACKAGE



DEL RIO RANCH

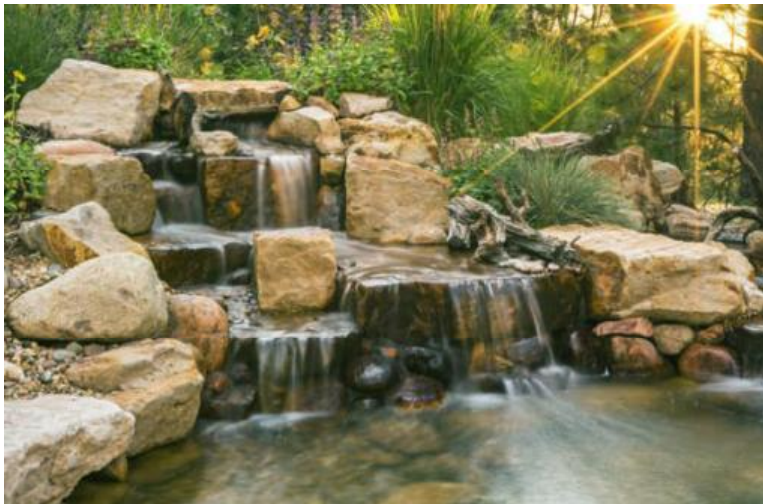
2115 EL CAMINO REAL - ATASCADERO, CA 93422

MOOD BOARD - AMENITIES

A6

05/07/2024

SCHEMATIC PACKAGE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

MOOD BOARD - LANDSCAPE

A7

05/07/2024

SCHEMATIC PACKAGE



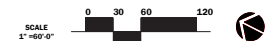
LEGEND

- ① VEHICLE ROUNDABOUT W/ LANDSCAPE FEATURE
- ② MEDIAN LANDSCAPE BUFFER
- ③ ENTRY MONUMENT & PROJECT SIGNAGE LOCATION
- ④ NAVIGATIONAL SIGNAGE LOCATION
- ⑤ ENTRY & GATE ACCESS KIOSK
- ⑥ TURN CIRCLE W/ ACCENT PAVERS & LANDSCAPE FEATURE
- ⑦ NATURAL BOULDER & WATER FEATURE
- ⑧ COMMERCIAL PLAZA W/ SPECIAL PAVING
- ⑨ NATURAL GRAVEL FLEX PARKING & EVENT LOT
- ⑩ POTENTIAL BASIN AREA
- ⑪ RV CHECK-IN KIOSK
- ⑫ SITE WALLS & RETAINING
- ⑬ RV DETAIL & AUTO-SHOP
- ⑭ RV SERVICE PARKING
- ⑮ GOLF CART PARKING
- ⑯ GOLF CART SERVICE & CHARGING STATION
- ⑰ EVENT STAGE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422



SITE PLAN - COMMERCIAL ZONE

05/07/2024

A8

SCHEMATIC PACKAGE

SITE MAP - COMMERCIAL ZONE (THE VILLAGE & EVENT BASIN)



PEDESTRIAN PLAZA & OUTDOOR EVENT VENUE



GROUND FLOOR RETAIL W/ RENTAL UNITS ABOVE



EVENT BASIN W/ STAGE



SHOPS & ENTERTAINMENT



BUILDING MATERIALS

PRIMARY PLASTER FINISH:
SMOOTH STUCCO - WHITE COLOR



SECONDARY PLASTER FINISH:
SMOOTH STUCCO - LIGHT CREAM COLOR



DOOR/WINDOW TRIM FINISH:
LIGHT GRAY PRECAST CONCRETE



SECONDARY PLASTER FINISH:
SMOOTH STUCCO - LIGHT PEACH COLOR



ROOF TILES:
MEDITERRANEAN-STYLE CLAY TILES



UPPER LEVEL BALCONIES:
WROUGHT IRON RAILING W/ PRECAST TRIM



STOREFRONTS & SIGNAGE:
RETAIL WINDOW & DOOR SYSTEMS



PAVING MATERIALS

TYPICAL ROAD FINISH:
ASPHALT



PEDESTRIAN PLAZA PAVING:
SLATE FLAGSTONE PAVERS



EVENT BASIN:
NATURAL GRASS LAWNS



ACCENT ROAD FINISH:
COBBLE FRAMED AGGREGATE CONCRETE



ACCENT ROAD FINISH:
COBBLESTONE PAVING



PEDESTRIAN SIDEWALKS:
SMOOTH CONCRETE



FLEX PARKING & EVENT LOT:
COMPRESSED DG NATURAL GRAY FINISH



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - THE VILLAGE & EVENT BASIN

A9

05/07/2024

SCHEMATIC PACKAGE



LEGEND

- ① COMMERCIAL BUILDING FRONTING DEL RIO AND EL CAMINO
- ② MEDIAN LANDSCAPE BUFFER
- ③ ENTRY MONUMENT & PROJECT SIGNAGE LOCATION
- ④ ENTRY & GATE ACCESS KIOSK
- ⑤ TURN CIRCLE W/ ACCENT PAVERS & LANDSCAPE WATER FEATURE
- ⑥ NATURAL BOULDER & WATER FEATURE
- ⑦ COMMERCIAL PLAZA W/ SPECIAL PAVING
- ⑧ NATURAL GRAVEL FLEX PARKING & EVENT LOT
- ⑨ POTENTIAL BASIN AREA
- ⑩ GOLF CART PARKING
- ⑪ LANDSCAPE BUFFER AND RETAINING WALLS



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

ENLARGED CONCEPT SKETCH - PLAZA

05/07/2024

A10

SCHEMATIC PACKAGE

LEGEND

- ① MEDIAN LANDSCAPE BUFFER
- ② ENTRY MONUMENT & PROJECT SIGNAGE LOCATION
- ③ ENTRY & GATE ACCESS KIOSK
- ④ NATURAL GRAVEL FLEX PARKING & EVENT LOT
- ⑤ POTENTIAL BASIN AREA/EVENT FLEX
- ⑥ LANDSCAPE BUFFER AND RETAINING WALLSV
- ⑦ RV DETAIL & AUTO-SHOP
- ⑧ GOLF CART PARKING
- ⑨ EVENT STAGE
- ⑩ TEMPORARY FOOD TRUCK/TENT SETUP AREA
- ⑪ TEMPORARY SEATING/LOUNGE AREA



EL CAMINO REAL



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

ENLARGED CONCEPT SKETCH - THE EVENT BASIN

05/07/2024

A11
SCHEMATIC
PACKAGE

SITE MAP - COMMERCIAL ZONE (VEHICLE CHECK-IN & SERVICE)



OFFICE PATIO W/ SEATING & LANDSCAPE



AUTO DETAIL/SERVICE SHOP



CHECK-IN & INFO BUILDING



GENERAL STORE W/ MANAGER'S UNIT ABOVE

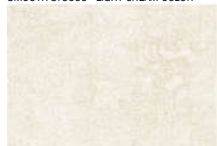


BUILDING MATERIALS

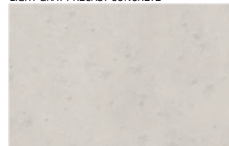
PRIMARY PLASTER FINISH:
SMOOTH STUCCO - WHITE COLOR



SECONDARY PLASTER FINISH:
SMOOTH STUCCO - LIGHT CREAM COLOR



DOOR/WINDOW TRIM FINISH:
LIGHT GRAY PRECAST CONCRETE



WOOD ACCENTS:
DARK STAINED OAK WOOD FINISH



PAVING MATERIALS

TYPICAL ROAD FINISH:
ASPHALT



PEDESTRIAN SIDEWALKS:
SMOOTH CONCRETE

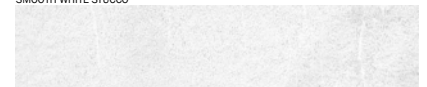


SITE WALL MATERIALS

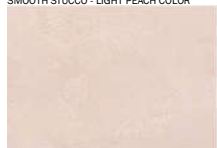
PRIMARY RETAINING WALLS:
POURED CONCRETE



ACCENT SITE WALLS:
SMOOTH WHITE STUCCO



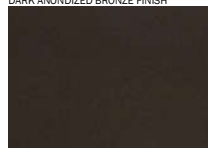
SECONDARY PLASTER FINISH:
SMOOTH STUCCO - LIGHT PEACH COLOR



ROOF TILES:
MEDITERRANEAN STYLE CLAY TILES



METAL ACCENTS:
DARK ANODIZED BRONZE FINISH



ACCENT ROAD FINISH:
COBBLE FRAMED AGGREGATE CONCRETE



PATIO PAVING:
SLATE FLAGSTONE PAVERS



ACCENT SITE WALLS:
LOCALLY SOURCED SANTA BARBARA STONE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - VEHICLE CHECK-IN & SERVICE

A12

05/07/2024

SCHEMATIC PACKAGE



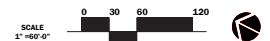
LEGEND

- ① TERRACED WATER & BOULDER FEATURE
- ② GOLF CART PARKING STATION
- ③ NAVIGATIONAL SIGNAGE LOCATION
- ④ THE "OASIS" GLAMPING UNITS
- ⑤ THE "AIRSTREAM VILLAGE" GLAMPING UNITS
- ⑥ THE "NEST" GLAMPING UNITS
- ⑦ THE "TERRACE" GLAMPING UNITS
- ⑧ SITE WALLS & RETAINING
- ⑨ PRIVATE LAWN & SEATING AREA
- ⑩ NATURAL PEDESTRIAN PATHS
- ⑪ PRIVATE ADULT GROTTOS & BAR
- ⑫ CLUBHOUSE POOL & SUN DECK
- ⑬ NATURAL GRAVEL PARKING AREA
- ⑭ TURN CIRCLE & DROP-OFF
- ⑮ LANDSCAPE FEATURE @ TURN CIRCLE
- ⑯ CLUBHOUSE GATE & ENTRY



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422



SITE PLAN - RESORT ZONE

05/07/2024

A13

SCHEMATIC PACKAGE

SITE MAP - RESORT ZONE (THE COURTYARD)



COBBLESTONE COURTYARD W/ PEDESTRIAN SCALE BUILDINGS



STAIRS & TRAIL CONNECTIONS TO OTHER SITE AMENITIES



CLUB CAR/PEDESTRIANS ONLY



GRAND STAIRS & FOUNTAIN

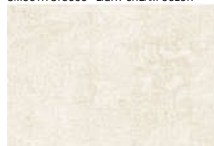


BUILDING MATERIALS

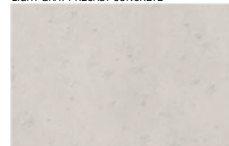
PRIMARY PLASTER FINISH:
SMOOTH STUCCO - WHITE COLOR



SECONDARY PLASTER FINISH:
SMOOTH STUCCO - LIGHT CREAM COLOR



DOOR/WINDOW TRIM FINISH:
LIGHT GRAY PRECAST CONCRETE



SECONDARY PLASTER FINISH:
SMOOTH STUCCO - LIGHT PEACH COLOR



ROOF TILES:
MEDITERRANEAN STYLE CLAY TILES



THE COURTYARD AMENITIES & SERVICES

SPA & WELLNESS CENTER



GROUP HEALTH & FITNESS CLASSES



SELF-SERVICE LAUNDRY & CAFE



GYM & FITNESS CENTER



PAVING MATERIAL

COURTYARD FINISH:
COBBLESTONE PAVING



SITE WALL MATERIALS

PRIMARY RETAINING WALLS:
POURED CONCRETE



ACCENT SITE WALLS:
SMOOTH WHITE STUCCO



ACCENT SITE WALLS:
LOCALLY SOURCED SANTA BARBARA STONE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - THE COURTYARD

05/07/2024

A14

SCHEMATIC PACKAGE

SITE MAP - RESORT ZONE (THE CHATEAU)



RESORT CLUBHOUSE W/ CONNECTION TO GLAMPING SITES



MANICURED EVENT LAWN & GARDENS



POOL & SUN DECK W/ CABANAS & LANDSCAPE

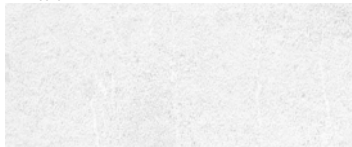


EXTERIOR PATIO W/ SEATING & HILLSIDE VISTA

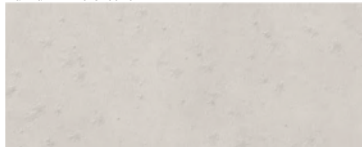


BUILDING MATERIALS

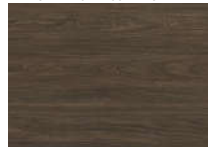
PRIMARY PLASTER FINISH:
WHITE COLOR



DOOR/WINDOW TRIM FINISH:
LIGHT GRAY PRECAST CONCRETE



WOOD ACCENTS:
DARK STAINED OAK WOOD FINISH



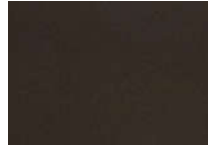
STONE ACCENT FINISH:
LOCALLY SOURCED SANTA BARBARA STONE



ROOF TILES:
MEDITERRANEAN STYLE CLAY TILES



METAL ACCENTS:
DARK ANODIZED BRONZE FINISH



PAVING MATERIALS

TYPICAL ROAD FINISH:
ASPHALT



PEDESTRIAN STAIRS & SIDEWALKS:
SMOOTH CONCRETE



ACCENT ROAD FINISH:
COBBLE FRAMED AGGREGATE CONCRETE



PATIO & POOL DECK FINISH:
SLATE FLAGSTONE PAVERS



SITE WALL MATERIALS

PRIMARY RETAINING WALLS:
POURED CONCRETE



ACCENT SITE WALLS:
SMOOTH WHITE STUCCO



ACCENT SITE WALLS:
LOCALLY SOURCED SANTA BARBARA STONE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - THE CHATEAU

05/07/2024

A15

SCHEMATIC PACKAGE



LEGEND

- ① TERRACED WATER & BOULDER FEATURE
- ② GOLF CART PARKING STATION
- ③ THE "OASIS" GLAMPING UNITS
- ④ THE "GARDEN" GLAMPING UNITS
- ⑤ SITE WALLS & RETAINING
- ⑥ NATURAL PEDESTRIAN PATHS
- ⑦ PRIVATE ADULT GROTTO'S & BAR
- ⑧ CLUBHOUSE POOL & SUN DECK
- ⑨ TURN CIRCLE & DROP-OFF
- ⑩ LANDSCAPE FEATURE @ TURN CIRCLE
- ⑪ CLUBHOUSE GATE & ENTRY
- ⑫ SHARED RESTROOM FACILITY
- ⑬ BAR LOUNGE AND SEATING AREA
- ⑭ PRIVATE CABANAS



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

ENLARGED CONCEPT SKETCH - THE CHATEAU

A16

05/07/2024

SCHEMATIC PACKAGE

SITE MAP - RESORT ZONE (THE GROTTO & THE TERRACE)



PRIVATE GROTTO SPAS W/ FEATURE LANDSCAPE



PRIVATE BAR W/ GLAZING BUILT INTO HILLSIDE



TERRACE TENTS & CAMPSITES



TERRACE TRAILS/LANDSCAPE



PRIVATE GROTTO POOL & SPAS



NATURAL BOULDER/WATER FEATURES

NATURAL BOULDERS & NATIVE LANDSCAPE
WATERFALL FEATURES SCATTERED THROUGHOUT SITE



INDOOR/OUTDOOR GROTTO BAR

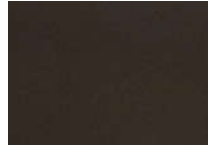
FOLDING GLASS WALL SECURITY DOOR
NEUTRAL EARTH TONE COLORS & MATERIALS



WOOD ACCENTS:
DARK STAINED OAK WOOD FINISH



METAL ACCENTS:
DARK ANODIZED BRONZE FINISH



PAVING MATERIALS

PEDESTRIAN STAIRS & SIDEWALKS:
SMOOTH CONCRETE



PATIO & POOL DECK FINISH:
SLATE FLAGSTONE PAVERS



ACTIVITY & EVENT LAWNS:
MANICURED NATURAL GRASS LAWN



PEDESTRIAN TRAILS & CAMPSITES:
COMPRESSED DG NATURAL GRAY FINISH



SITE WALL MATERIALS

PRIMARY RETAINING WALLS:
POURED CONCRETE



ACCENT SITE WALLS:
SMOOTH WHITE STUCCO



ACCENT SITE WALLS:
LOCALLY SOURCED SANTA BARBARA STONE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - THE GROTTO & THE TERRACE

05/07/2024

A17

SCHEMATIC PACKAGE

SITE MAP - RESORT ZONE (THE OASIS, NEST & AIRSTREAM VILLAGE)



"NEST" GLAMPING UNITS W/ PRIVATE DECK & SPA



"OASIS" GLAMPING CLUSTERS W/ PEDESTRIAN TRAILS



"AIRSTREAM VILLAGE" CAMPSITE W/ PRIVATE PARKING STALL



"OASIS" GLAMPING UNITS W/ PRIVATE DECK ON THE WATER



THE "AIRSTREAM VILLAGE" UNITS

PRE-FAB AIRSTREAM (OR SIMILAR) CAMPER:
STAINLESS STEEL FINISH



PRE-FAB GLAMPING CAPSULE:
WHITE EXTERIOR FINISH W/ BLACK FRAME GLAZING



PARKING AREA:
COMPRESSED DG NATURAL GRAY FINISH

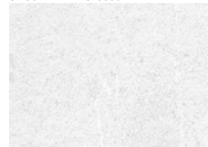


PRIVATE DECK MATERIAL:
WOODEN DECKING NATURAL OAK FINISH



THE "OASIS" CABANAS

PLASTER FINISH:
SMOOTH WHITE STUCCO



EXTERIOR CURTAINS:
HEAVY CANVAS PRIVACY DRAPES



PRIVATE DECK MATERIAL:
WOODEN DECKING NATURAL OAK FINISH



METAL A-FRAME STRUCTURE:
DARK ANODIZED BRONZE FINISH



EXTERIOR GLAZING:
BLACK FRAME CURTAIN WALL SYSTEM



DECK PRIVACY SCREEN:
HORIZONTAL WOODEN SLATS NATURAL OAK FINISH



COMMON PAVING MATERIALS

NATURAL GRASS LAWNS



SMOOTH CONCRETE PEDESTRIAN SIDEWALKS



COMPRESSED DG PEDESTRIAN TRAILS



DEL RIO RANCH

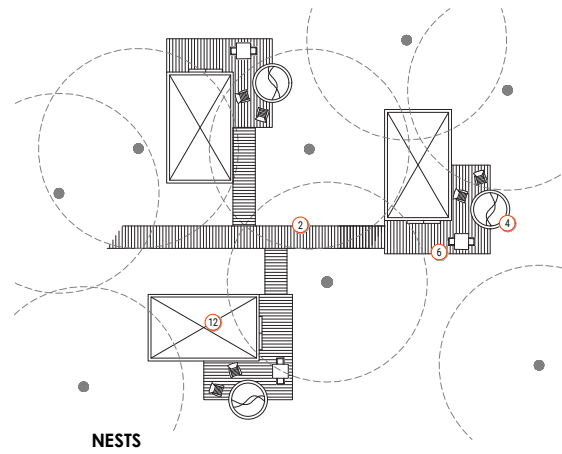
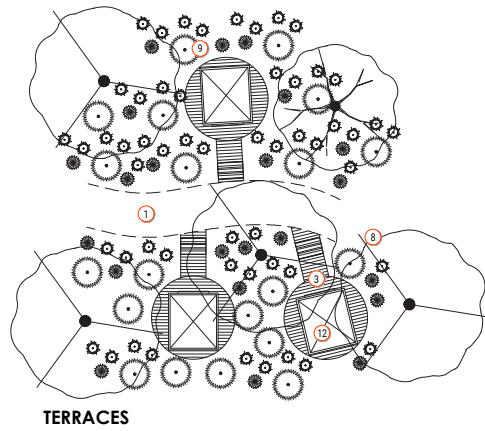
2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - THE OASIS, NEST & AIRSTREAM VILLAGE

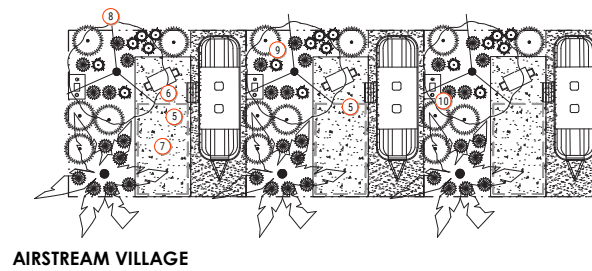
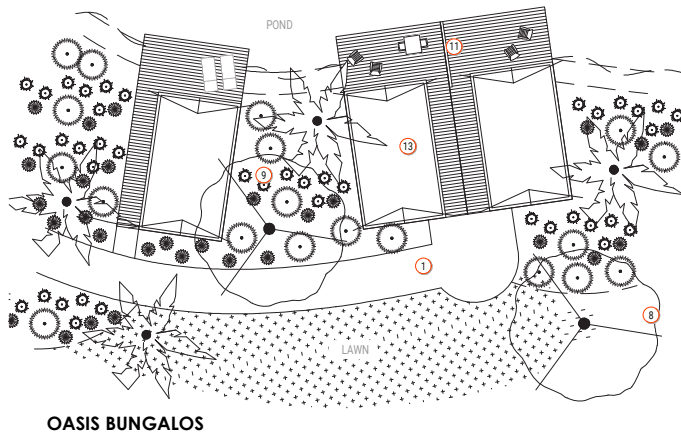
05/07/2024

A18

SCHEMATIC PACKAGE



- DESIGN KEY**
- ① COMPACTED DECOMPOSED GRANITE CART PATH
 - ② RAISED DECK PLATFORM (PROTECT OAKS)
 - ③ DECK PLATFORM ON GRADE
 - ④ CEDAR TUBS AT PREMIUM UNITS
 - ⑤ CONCRETE PATIO
 - ⑥ PICNIC TABLE
 - ⑦ PARKING SPACE
 - ⑧ SHADE TREES TYP
 - ⑨ SCREENING SHRUBS TO PROVIDE PRIVACY
 - ⑩ STANDARD HOOKUPS
 - ⑪ ROLLING GATE FOR GROUP RESERVATION
 - ⑫ CANVAS OR LIKE MATERIAL SEMI PERMANENT STRUCTURE
 - ⑬ FULLY CONDITIONED PERMANENT STRUCTURE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

TYPICAL GLAMPING UNITS LAYOUT

A19

05/07/2024

SCHEMATIC PACKAGE



LEGEND

- ① THE "OASIS" GLAMPING UNITS
- ② NATURAL PEDESTRIAN PATHS
- ③ TURN CIRCLE & DROP-OFF
- ④ LANDSCAPE FEATURE @ TURN CIRCLE
- ⑤ CLUBHOUSE AREA
- ⑥ THE COURTYARD
- ⑦ SITE WALLS & RETAINING



DEL RIO RANCH

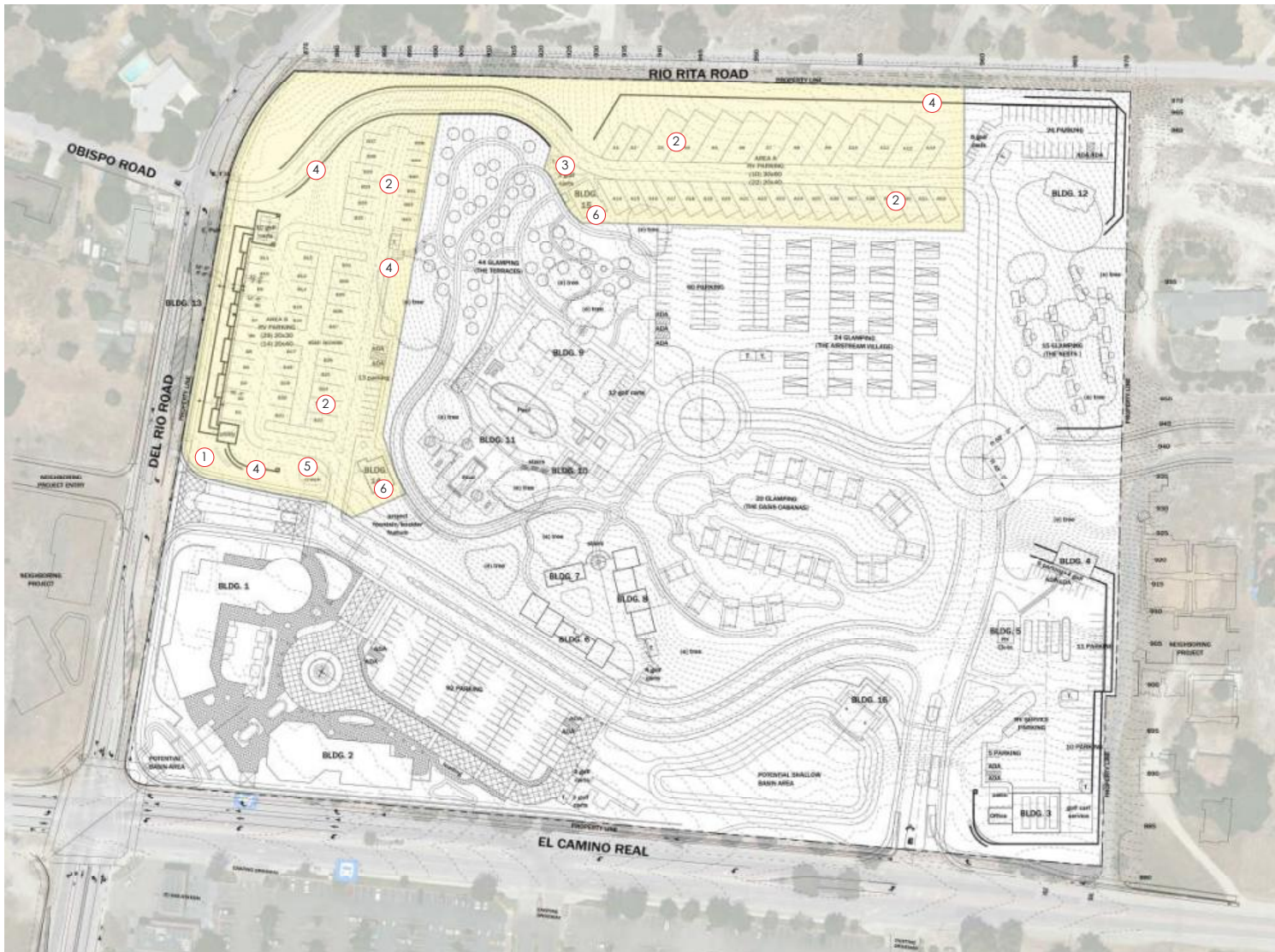
2115 EL CAMINO REAL - ATASCADERO, CA 93422

ENLARGED CONCEPT SKETCH - THE OASIS

05/07/2024

A20

SCHEMATIC PACKAGE



LEGEND

- ① PROJECT ENTRY SIGNAGE
- ② VEHICLE & RV CAMPSITES W/ FULL HOOK-UPS
- ③ GOLF CART PARKING STATION
- ④ SITE WALLS & RETAINING W/ LANDSCAPE BUFFERS
- ⑤ DRY CREEK & LANDSCAPE FEATURE
- ⑥ RESTROOMS & SHOWERS BUILDING



DEL RIO RANCH

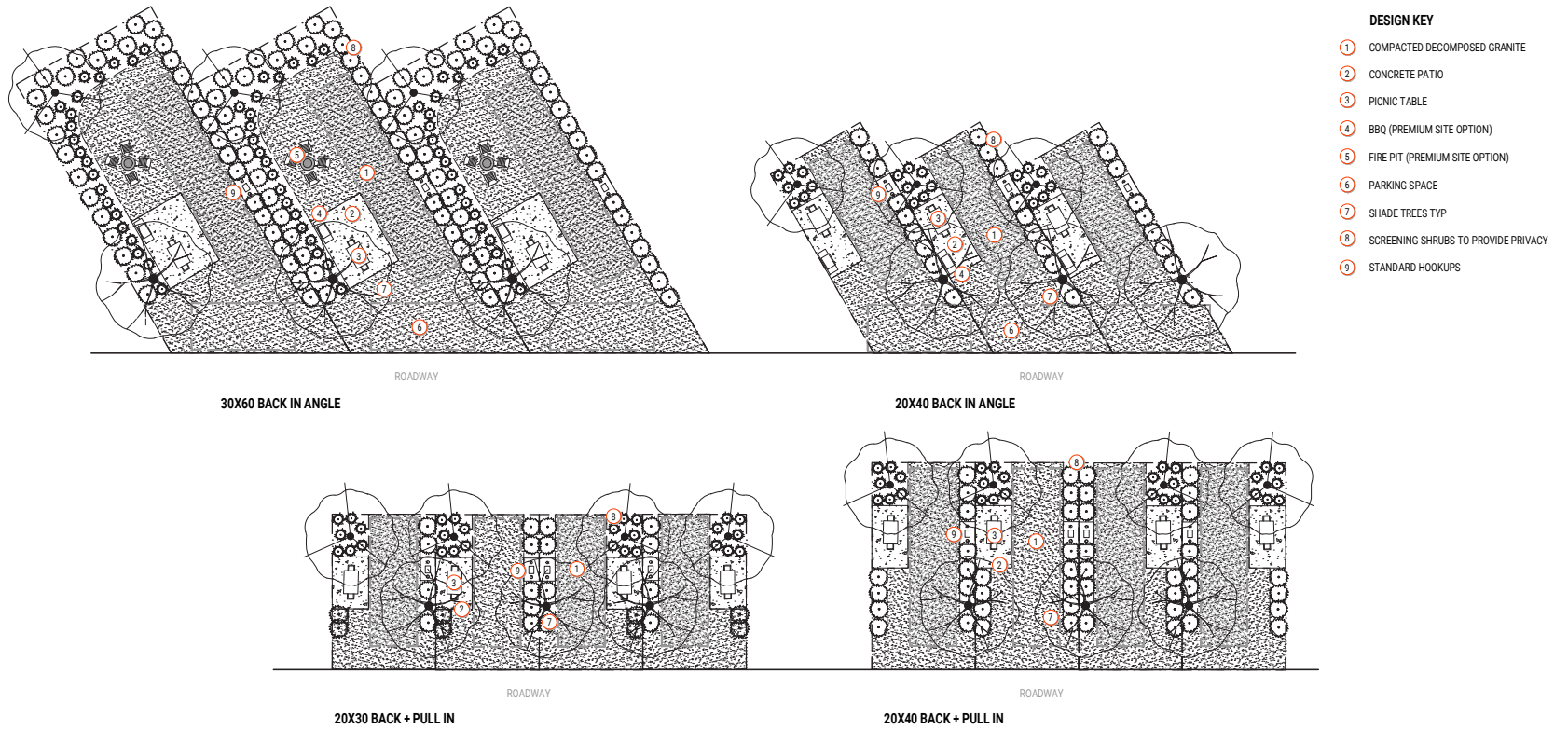
2115 EL CAMINO REAL - ATASCADERO, CA 93422

SITE PLAN - RV ZONE

05/07/2024

A21

SCHEMATIC PACKAGE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

RV SITE TYPICAL LAYOUTS

A22

05/07/2024

SCHEMATIC PACKAGE

SITE MAP - RV ZONE (VEHICLE CAMPSITES & RESTROOMS)



SCATTERED LAWN GAMES & SEATING AREAS



CONCRETE VEHICLE PAD W/ GRAVEL CAMPSITE AREA



LARGE VEHICLE BACK-IN CAMP SITES W/ FULL HOOKUPS

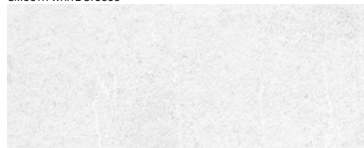


BUILDING MATERIALS

RESTROOM & SHOWER BUILDINGS:
STUCCO W/ CLAY TILE ROOF



PRIMARY PLASTER FINISH:
SMOOTH WHITE STUCCO



ROOF TILES:
MEDITERRANEAN STYLE CLAY TILES

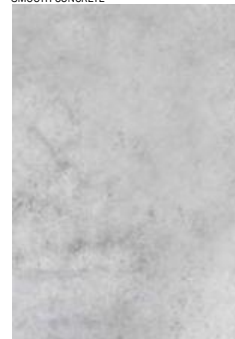


PAVING MATERIALS

TYPICAL ROAD FINISH:
ASPHALT



VEHICLE PARKING PADS & SIDEWALKS:
SMOOTH CONCRETE



PEDESTRIAN TRAILS & CAMPSITES:
COMPRESSED DG NATURAL GRAY FINISH



SITE WALL MATERIALS

PRIMARY RETAINING WALLS:
POURED CONCRETE



ACCENT SITE WALLS:
SMOOTH WHITE STUCCO



ACCENT SITE WALLS:
LOCALLY SOURCED SANTA BARBARA STONE



DEL RIO RANCH

2115 EL CAMINO REAL - ATASCADERO, CA 93422

COLORS & MATERIALS - VEHICLE CAMPSITES

05/07/2024

A23

SCHEMATIC PACKAGE



DEL RIO RANCH

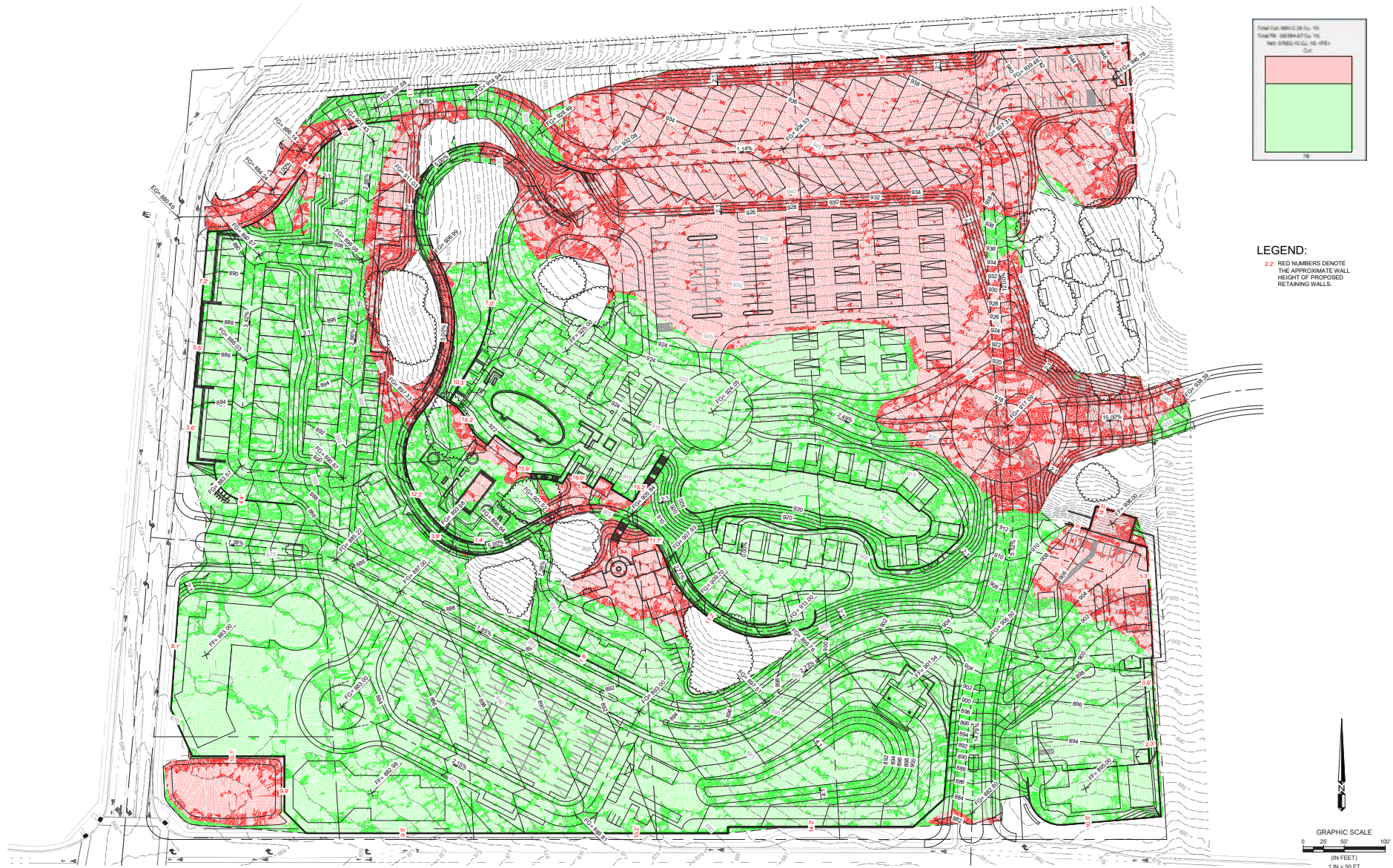
2115 EL CAMINO REAL - ATASCADERO, CA 93422

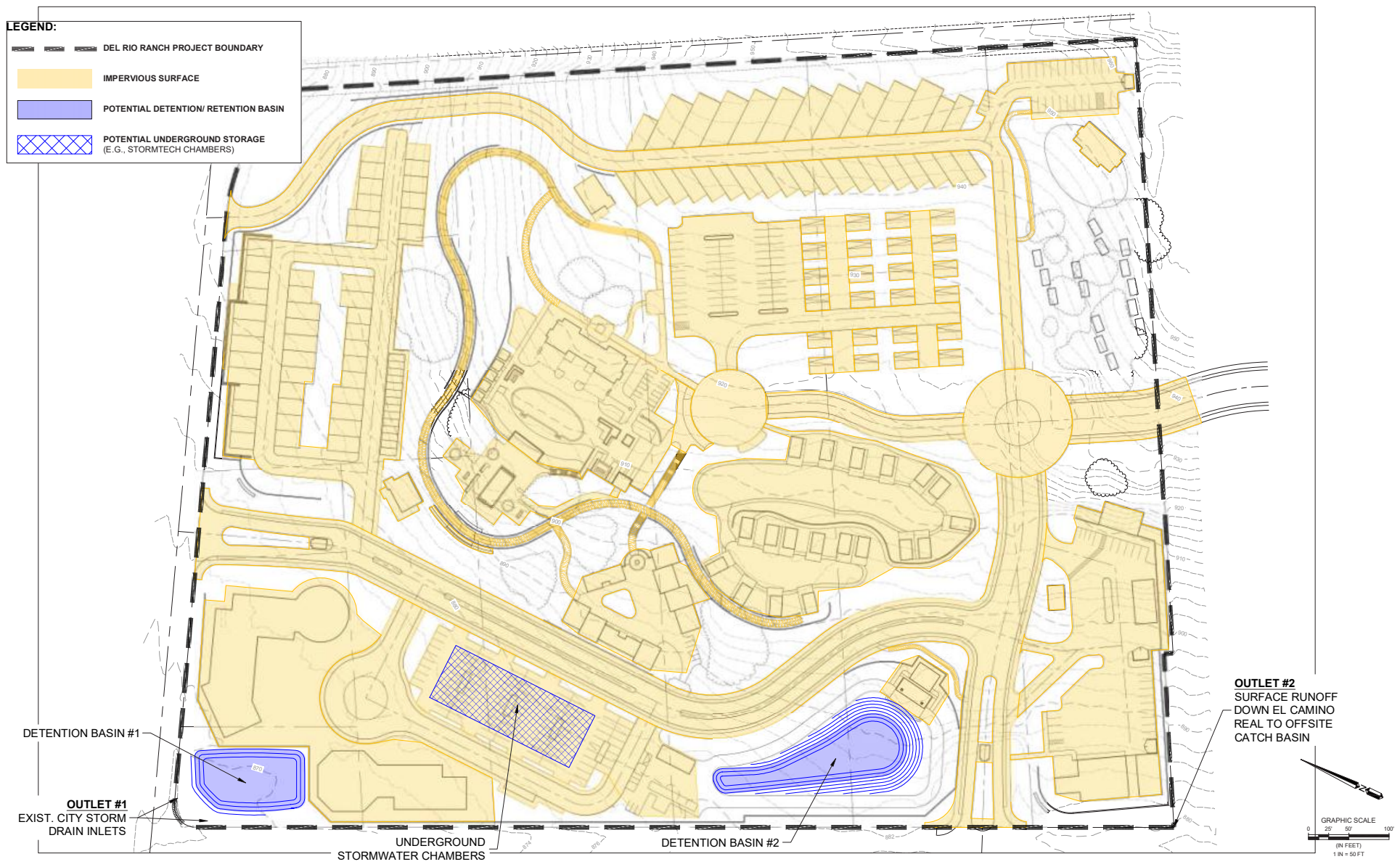
ENLARGED CONCEPT SKETCH - DEL RIO ENTRY & VEHICLE CAMPSITES

05/07/2024

A24

SCHEMATIC PACKAGE





Del Rio Ranch
Preliminary Drainage Exhibit

FOR REVIEW ONLY.
NOT FOR CONSTRUCTION.

PP24-8063 DRR
BY: RAH/ZKP
Date: 5/6/2024





DEL RIO RANCH



CITY OF ATASCADERO

CITY COUNCIL STAFF REPORT

Item C2

Department: Administrative Services
Date: 5/28/24
Placement: Management Report

TO: JAMES R. LEWIS, CITY MANAGER
FROM: JERI RANGEL, DIRECTOR OF ADMINISTRATIVE SERVICES
PREPARED BY: JERI RANGEL, DIRECTOR OF ADMINISTRATIVE SERVICES
SUBJECT: Appointive City Treasurer Ballot Measure

RECOMMENDATION:

Council direct the City Clerk to bring back to the Council in June 2024 the Resolution required for placing a ballot measure on the ballot for the General Municipal Election to be held on Tuesday, November 5, 2024, asking voters "Shall the City Treasurer be appointive?"

REPORT IN BRIEF:

Council consideration of placing a ballot measure on the November 2024 General Municipal Election to appoint the City Treasurer. The City Treasurer is currently elected by the voters of Atascadero.

DISCUSSION:

The City Treasurer position has been an elected position since the City was incorporated in 1979 as per Government Code §36502. The trend of cities throughout the State has been to convert to the use of appointive rather than elected City Treasurers.

Under State law, the only qualifications needed to serve in the elected City Treasurer position is to be at least 18 years of age, a resident of Atascadero, and a registered voter of Atascadero. The City is prohibited from establishing any other requirements. The City Treasurer position necessitates the Treasurer be current and well versed with highly technical professional standards, laws, regulations, and management systems. The current City Treasurer professionally performs his responsibilities, however there is no guarantee that any future Treasurer would have the necessary qualifications and expertise.

The City has been fortunate to have Gere Sibbach elected to City Treasurer for the past ten years and Joesph Modica from 2002 to 2014 however, there is no way to ensure that the City will continue to have stellar candidates run for the position. In 2016, Atascadero voters changed the

elected City Clerk to an appointed position for similar reasons and concerns. On the same ballot, a measure to make the City's Treasurer position appointed rather than elected was defeated by a narrow margin of 3.5 percent.

When this position comes up for election in 2026, it may be difficult to find qualified individuals available to run for this position in a community the size of Atascadero. Many cities have experienced a reluctance of any individuals willing to run for the position. Atascadero's City Treasurer currently receives a \$400 monthly stipend and health benefits.

In 2010, the San Luis Obispo County Grand Jury interviewed all City Clerks and Treasurers, researched city policies and procedures, and released a report titled, "Electing City Treasurers and Clerk: Wise or Otherwise?" In this report the Grand Jury concluded:

- Atascadero could benefit from having an appointed City Treasurer.
- There is continued risk of electing treasurers who can win office with a political agenda and no qualifications.
- Health benefits alone may be sufficient to attract unqualified persons to run for these positions.

In San Luis Obispo County, Atascadero and Paso Robles are the only two cities in San Luis Obispo County that continue to have an elected Treasurer.

Atascadero's current City Treasurer, Gere Sibbach, is recommending to the City Council to consider placing a ballot measure on the ballot for the General Municipal Election to be held on Tuesday, November 5, 2024, asking voters "Shall the City Treasurer be appointive?" In the future, making this position appointive will:

- Help ensure the City is able to appoint an individual to the position of City Treasurer that possesses the necessary qualifications and expertise.
- Eliminate the potential for individuals to be elected to this position that require duties that they are unqualified to perform, which could cause serious problems for the City.
- Remove this position from political pressures in performing the duties and responsibilities.

It is best to place this type of ballot measure on a ballot that does not include these positions for election. If the City Council places the recommended ballot measures on the ballot this year, and they are successful, the change would be effective at the end of the existing elected terms of the City Treasurer, which is December 2026. If the current elected position becomes vacant prior to December 2026, the elected position would terminate and a new person would be appointed.

State Code authorizes the City Council to submit to the voters the question of whether or not to make this position appointive:

Government Code §36508:

At any municipal election, or a special election held for that purpose, the city council may submit to the electors the question whether the elective officers, or any of them except council members, shall be appointed by the city council; provided, however, that the city

council shall not submit such question to the electors more often than once in an 11-month period.

(Amended by Stats. 2010, Ch. 699, Sec. 11. Effective January 1, 2011.)

Government Code §36509:

The question shall be printed on the ballots used at the election substantially in one of the following forms:

(a) "Shall the office of city treasurer be appointive?"

The words "yes" and "no" shall be so printed on the ballots that the voters may express their choice.

(Amended by Stats. 1957, Ch. 765.)

If a majority of voters approve making the position appointive, Government Code §36510 provides that the City Council can, by ordinance, delegate its appointment authority to the City Manager:

Government Code §36510:

If a majority of the votes cast on the proposition is for it, the city council shall appoint such officers at the expiration of the terms of the officers then in office, and on a vacancy in any such office. Such officers shall hold office during the pleasure of the city council and, notwithstanding Section 36502 to the contrary, are not required to be residents or electors in the city. The city council may by ordinance vest in the city manager its authority to appoint such officers.

(Amended by Stats. 1963, Ch. 509.)

Delegating appointment authority to the City Manager is recommended for the following reasons:

1. Selection of the next City Treasurer would be handled with the same selection process already used for other positions in the City to ensure a qualified candidate is appointed.
2. Supervision and performance evaluation would be provided most effectively since most day-to-day direction and oversight is provided by the City Manager.

The elected City Treasurer is currently eligible to receive a \$400 monthly stipend and the option of full health benefits, resulting in potential costs of up to approximately \$16,800 in 2024, though this amount will change as the costs of health benefits increases. Fiscal year 2024 stipend and health benefits costs for the current elected treasurer are expected to be about \$5,700.

ALTERNATIVES TO THE STAFF RECOMMENDATION:

1. Council may choose to keep the City Treasurer an elected position and refrain from placing this on the ballot.

FISCAL IMPACT:

The addition of a ballot measure to the November 2024 ballot is estimated to be \$3,000-\$6,000. If the ballot measure is successful, savings from the elimination of the stipends and health benefit costs for the elected position is estimated to be about \$16,800 annually.

REVIEWED BY OTHERS:

This item has been reviewed by the Deputy City Manager.

REVIEWED AND APPROVED FOR COUNCIL AGENDA



James R. Lewis, City Manager

ATTACHMENT(S):

1. Atascadero Municipal Code, Sections 2-7.01 - 2-7.05

ATTACHMENT 1

ATASCADERO MUNICIPAL CODE

Title 2, Chapter 7 CITY TREASURER

2-7.01 Creation and functions.

(a) The office of the City Treasurer is confirmed as provided in Sections 36501 and 36502 of the Government Code of the State. The office shall be elected. The City Treasurer shall perform such duties as are prescribed by Sections 41001 through 41007 of the Government Code of the State. The City Treasurer shall perform such other duties consistent with this Code as may be required of him or her by the Council.

(b) The principal functions of the City Treasurer shall be to receive and safely keep all public funds coming into his or her hands as treasurer, and to comply with all laws governing the deposit and securing of public funds and the handling of trust funds in his or her possession. (Ord. 564 § 1, 2012; Ord. 49 § 2-5.201, 1982)

2-7.02 Deputies.

The City Treasurer may appoint deputies for whose acts he or she and his or her bondspeople are responsible, but in doing so, shall not incur any indebtedness or liability on behalf of the City except as authorized by the City Council. (Ord. 49 § 2-5.202, 1982)

2-7.03 Compensation.

The City Treasurer shall receive a salary of two hundred dollars (\$200.00) a month through December 31, 2016. The City Treasurer shall receive a salary of four hundred dollars (\$400.00) per calendar month commencing on January 1, 2017 and thereafter. (Ord. 591 § 5, 2015; Ord. 49 § 2-5.203, 1982)

2-7.04 Coordination with Director of Finance.

The City Treasurer shall coordinate his or her activities with the Director of Finance to assure availability of funds in response to demands for payment against City financial resources. The City Treasurer shall not withhold making available funds to the Finance Director for payment of materials, equipment, goods or services duly authorized by the Council through the adopted budget or by Council approval by ordinance, resolution or motion when requests for such funds are duly authorized and presented by the Director of Finance. (Ord. 49 § 2-5.204, 1982)

2-7.05 Investment policy.

In addition to the requirements, duties and obligations imposed upon the City Treasurer by the State Government Code concerning the investment of City moneys, the City Treasurer shall attempt to secure the maximum rate of return on invested uncommitted City funds consistent with assuring availability of funds to meet the City's financial obligations and consistent with statutory investment limitations. In order to assure compliance with this requirement, the City Treasurer shall closely coordinate the investment of funds with the Director of Finance to assure the ability of the City to meet its obligations. (Ord. 49 § 2-5.205, 1982)