VENTURA LAFCO
WATER & WASTEWATER SERVICE REVIEW
PART I

1. Contact Information (all agencies)

a. Name of City/District: City of Simi Valley

Mailing Address: 2929 Tapo Canyon Road

City Simi Valley State CA Zip 93063-

Primary Office Address (if different): _____

City _____ State CA Zip _____

Telephone: (858) 583-6700 Fax: (805) 583-6300

E-Mail: www.simivalley.org

b. Manager (Chief Staff Official):

Last Name: Sedell First Name: Mike

Title City Manager

Mailing Address (if different than contact):

Address Same

City: _____ State: CA Zip _____

Telephone (805) 583-6701 Ext _____ Fax (805) 583-2489

E-mail: msedell@simivalley.org

c. Contact (if different than manager):

Last Name: Nanson First Name: Tim

Title Director of Public Works

Address: _____

City: _____ State: CA Zip _____

Telephon (805) 583-6793 Ext.: _____ Fa (805) 583-6300

E-mail: tnanson@simivalley.org

d. Legal Counsel: David H. Hirsch

Title: City Attorney

Mailing Address (if diferent than m _____

City: _____ State: CA Zip _____

Telephone (805) 583-6714 Ext: _____ Fax (805) 526-2489

E-mail dhirsch@simivalley.org

Agency Name: City of Simi Valley

Goverance Information (all agencies)

a. Agency Type (check all that apply

☑ City Date of Incorporation: 10/10/1969

☑ General Law ☐ Charter

☐ Independent Special District ☐ Dependent Special District

Enabling Legislation (citation for principal act)

Date of Formation:

b. Governing Body:

☑ City Council ☐ Board or Directors ☐ Other (specify)

Number of Members 5

How are members selected ☑ at large vote ☐ voting districts

☐ voting divisions ☐ appointment at large ☐ appointment by district

☐ other (specify)

If elected, date of last election 11/01/2002

How may members ran unopposed:

Terms of office ☑ 4 year ☐ 2 year

☐ Other (specify)

c. Current Member Data (attach extra sheets if needed)

Name: Bill Davis Title: Mayor

☑ Elected or ☐ Appointed Expiration Date of Term 11/ 1/2004

Name: Steven T. Sojka Title: Mayor Pro Tem.

☐ Elected or ☑ Appointed Expiration Date of Term: 11/ 1/2004

Name:: Barbra Williamson Title: Councilmember

☑ Elected or ☐ Appointed Expiration Date of Term: 11/ 1/2004

Name: Pauk Miller Title: Councilmember

☑ Elected or ☐ Appointed Expiration Date of Term: 11/ 1/2006

Name:: Glen T. Becerra Title: Councilmember

☑ Elected or ☐ Appointed Expiration Date of Term: 11/ 1/2006

Name: Title:

☐ Elected or ☐ Appointed Expiration Date of Term:

Name: Title:

☐ Elected or ☐ Appointed Expiration Date of Term:

Agency Name: City of Simi Valley

d. Compensation (of elected officials)

Basic Stipend: $959.42 ☐ per meeting or ☑ per month

District compensation: ☐ GovCompDC Mileage amount per mile: 0.36

☐ Meals ☐ Monthly travel Amount:

☑ Other Spec Expence Allowance: Mayor $512.05/month: Councilmember $404.25/m

Insurance Coverage ☑ Life $151,000

☑ Medical $810.00 ☑ Dental $54.96

☑ Other (Specify): Vision Amount: $17.48

Retirement Benef PERS- 2%@55

Amount:

Is there a limit on the amount a board member/city council member can earn

☑ Check for Yes blank for No Amount: $959.42

Are new board members provided with an orientation session with the General Manager/City Manager?

☑ Check for Yes blank for No With Legal Council? ☑ Check for Yes blank for No

e. Meeting Information

Regular Scheduled meetings day:: Monday Time: 6:30 PM

Regular meeting location: Address: 2929 Tapo Canyon Road

City: Simi Valley

ZipCode: 93063

Is location easily accessible to the public ☑ Check for Yes blank for No

Does the location of your meetings comply with requirements of the Americans with Disabilities Act (ADA)? ☑ Check for Yes blank for No

List ways notice of regular meetings is given to the public:

Posted in 3 locations, faxed to press, posted on city's website, public counter

Does your agency conduct regular reviews of the requirements of the

Brown Act ☑ Check for Yes blank for No FPPC ☑ Check for Yes blank for No

Public disclosure requirements ☑ Check for Yes blank for No

Date of Last review session:

Has your agency been cited for a violation of the Brown Act and/or FPPC regulations in the previous two years?

☐ Check for Yes blank for No

Agency Name: City of Simi Valley

3. Employee Information (all agencies)

Executive/Management staff is defined as department head or above; Professional/Support is defined as staff whose primary function is related to supervision, management or administration of wastewater functions; Operational staff is defined as staff whose primary function is the direct provision of water or wastewater services.

a. Total No. of Employees _____

Executive and Management ____ Professional and Support ____

Operational: _____ Other (Specify): _____ Number: ____

b. Number of Employees in all aspects of Water Service

Executive and Management ____ Professional and Support ____

Operational _____ Other (Specify) _____ Number: ____

c. Number of Employees in all aspects of Wastewater Service

Executive and Management 2 Professional and Support 11

Operational 47 Other (Specify) (one part time op Number: ____

d. How many employee bargaining units are recognized? (list the number and the name of each bargaining unit):

1 Service Employee's International Union

_____

How many Employees are represented: Agency Total: _____

Water Service: _____

Wastewater Service 60

What are the dates and terms of the last bargaining agreements

_____

Agency Name	City of Simi Valley

4. Financial Information (all agencies)

a. Service Cost Information:

List current rates for all categories of services

Water Agencies – what are the rates in terms of acre-feet

Wastewater Agencies – what are the rates in terms of MGD See attached ordinance

Rate changes in last two years:

3.23% increase in 2001; 2.79% increase in 2002

Specify rate changes anticipated in next two years:

20% increase in 2003; 8% in 2004

Specify any rate differential charged for customers in the agency's boundaries versus rates charged for customers outside agency's boundaries?

none

b. Budget Information for the Last Three Fiscal years:

Are adopted budges posted on the agency website? ☐ Check for Yes Blank for No

Are copies of adopted budgets available to the public ☑ Check for Yes Blank for No

FY 2000-2001: Revenues: 8,540,500 Expenses: 8,544,900

Capital Improvements: 1,565,600 Reserves: 18,472,089

(For cities and dependent districts) please note charges assigned to water and/or wastewater budget which are transferred to the General Fund: 851,400

FY 2001-2002: Revenues: 9,185,400 Expenses: 9,308,800

Capital Improvements: 46,639,800 Reserves: 14,932,107

(For cities and dependent districts) please note charges assigned to water and/or wastewater budget which are transferred to the 906,600

FY 2002-2003: Revenues: 8,921,400 Expenses: 9,470,700

Capital Improvements: 5,599,000 Reserves: 10,755,256

(For cities and dependent districts) please note charges assigned to water and/or wastewater budget which are transferred to the General Fund: 1,066,500

Agency Name: **City of Simi Valley**

c. Revenues Sources for the Last Three Fiscal Years for all Agencies: Please fill in amount and percentage of the total of revenues.

FY 2000-2001:			**Voter Approved**	**Sunset Date**
Property Taxes:		%	☐ Check for Yes Blank for No	
Special Taxes:		%	☐ Check for Yes Blank for No	
Service Charges:	7,747,600	% 90.70%	☐ Check for Yes Blank for No	
Fees:	492,900	% 5.80%	☐ Check for Yes Blank for No	
Assessments:		%	☐ Check for Yes Blank for No	
Stand-by Charges		%	☐ Check for Yes Blank for No	
Grants:		%	☐ Check for Yes Blank for No	
Other (Specify):	Interest	Amount:	300,000 %	3.50%

FY 2001-2002:			**Voter Approved**	**Sunset Date**
Property Taxes:		%	☐ Check for Yes Blank for No	
Special Taxes:		%	☐ Check for Yes Blank for No	
Service Charges:	8,440,600	% 91.90%	☐ Check for Yes Blank for No	
Fees:	444,800	% 4.80%	☐ Check for Yes Blank for No	
Assessments:		%	☐ Check for Yes Blank for No	
Stand-by Charges:		%	☐ Check for Yes Blank for No	
Grants:		%	☐ Check for Yes Blank for No	
Other (Specify):	Interest	Amount:	300,000 %	3.30%

FY 2002-2003:			**Voter Approved**	**Sunset Date**
Property Taxes:		%	☐ Check for Yes Blank for No	
Special Taxes:		%	☐ Check for Yes Blank for No	
Service Charges:	8,469,100	% 94.90%	☐ Check for Yes Blank for No	
Fees:	259,000	% 2.90%	☐ Check for Yes Blank for No	
Assessments:		%	☐ Check for Yes Blank for No	
Stand-by Charges:		%	☐ Check for Yes Blank for No	
Grants:	0	% 0.00%	☐ Check for Yes Blank for No	
Other (Specify):	Interest	Amount:	193,300 %	2.20%

Are areas annexing to your agency acccessed stand-by charges (click for yes): ☑

If so what is the amount of the stand-by charge

Are areas annexing to your agency required to pay a share of exting bonded indebtness? (click for yes) ☑

If yes what is the amount: $552.55 per gross acre

Agency Name	City of Simi Valley

d. Reserves:

Reserve Definitions:

1) *Unallocated General Reserves. Funds set-aside for any budgetary short falls during the fiscal year or for purposes not specifically designated in any other reserve fund.*
2) *Capital Reserve Fund. Funds for infrastructure expansion, construction and replacement.*
3) *Operating Rate Stabilization Fund. Funds to protect users from fluctuations in rates.*
4) *Restricted Debt Reserves. Funds set aside to pay back debt.*
5) *Other Reserves. Funds set aside for specific purposes (i.e., scholarship, contingency, specify projects), varies by district.*

Reserve Definitions	FY 2002-2003	FY 2001-2002	FY 2000-2001
Total Reserves as % of Total Revenue	121.00%	163.00%	216.00%
Operating Reserves	2,545,073	2,462,755	2,678,740
Capital Reserve Fund	8,210,183	12,469,352	15,793,349
Operating and Rate Stabilization Fund			
Restricted Debt Reserves			
Other Reserves			

e. Audits

Date of last independent audit: 6/30/2002

Who conducted last independent audit? Diehl, Evens and Co., LLP

Was the audit qualified in any way? No

f. Bonds:

What is your agency's bond rating? AAA

What was the source of the rating? Standard and Poors

Agency Name:	City of Simi Valley

5. Government Structure (all agencies)

a. Has you agency been involved in a reorganization study in the previous two years? (Check for Yes) ☐

b. Has your agency been the subject of a grand jury in the previuos two years? (Check for Yes) ☐

c. Describe any litigations your agency has been involved in the previuos two years.

_____

d. Identify any limitations that might affect possible government structure options including:

Enabling legislation/charter: _____

Pending litigation: _____

Court judgement: _____

Legal issues: _____

Restricted assets: _____

Financial constraints: _____

Other: _____

Agency Name:	City of Simi Valley

6. Service Information (all agencies)

a. Provide a list of services provided by your agency:

Wastewater

Provide a brief narrative description of the service area for water service.

Provide a brief narrative description of the service area for wastewater service.

All City boundaires and Santa Susana Knolls Area

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b. Estimated January population in agency's boundaries: 115,000

Size in acres: 24,896

c. Estimaed January 2003 population in sphere influence: 120,000

Size in acres: 25,600

Agency Name	City of Simi Valley

7. Service Information (WATER AGENCIES OR DEPARTMENTS ONLY)

a. Total number of customers Retail _____ Wholesale: _____

b. Total Number of water service connections in Agency Boundaries

Domestic _____ Agricultural: _____ M()I _____

Reclaimed: _____ Other (specify): _____ Amount of Other: _____

c. Total Number of water service connections in Agency Sphere of Influence but outside Boundaries:

Domestic _____ Agricultural: _____ M()I _____

Reclaimed: _____ Other (specify): _____ Amount of Other: _____

d. Total Number of water service connections outside Agency Boundaries and Sphere of Influence:

Domestic _____ Agricultural: _____ M()I _____

Reclaimed: _____ Other (specify): _____ Amount of Other: _____

e. Shared Facilities:

Provide location information (street address, Assesor's Parcel No. etc.) for each connection outside agency's boundaries:

Address	Parcel Number	Etc...

f. Does your agency have a master plan? (Check for Yes) ☐

Date of current master plan: _____

Date of previous master plan: _____

Agency Name | City of Simi Valley

g: Water Facilities (provide for each facility) attach sheets if necessary

Location: _____

Miles of Lines _____ Type: _____

Capacity: _____ Year built: _____

Storage capacity in days _____ Year capacity last expanded: _____

What permits (local, state, federal) are required:

_____

Are required permits current (check the box for yes) ☐

Does your agency have permit violations: _____

Is your agency applying for new permits or permit amendments: _____

Date of latest Water Quality Report: _____ Are copies posted on the web? (Check for Yes) ☐

h. Water Source Information:

Imported Source: _____ Percentage of total: _____

Reclaimed: Source: _____ Percentage of Total _____

Other (specify) _____

Source: _____ Percentage of total: _____

Groundwater (list each source and no. of wells):

Source: _____ Percentage of total: _____

Source: _____ Percentage of total: _____

Source: _____ Percentage of total: _____

Source: _____ Percentage of total: _____

Source: _____ Percentage of total: _____

Surface (list each surface source:)

Source: _____ Percentage of total: _____

Source: _____ Percentage of total: _____

Source: _____ Percentage of total: _____

i: Additional Informaion

Does your agency meet the minimum storage requiremnts as recommended by the Ventura County Waterworks Manual? (Click for Yes) ☐

What is you agency's estimated peak demand? _____ What is your agency's peak demand capacity? _____

In the event of a power outage what additional resources of power are available: _____

If your agency relies on groundwater, what additional non-groundwater storage capacity have you developed?

_____

Agency Name: City of Simi Valley

8. Service Information (WASTEWATER AGENCIES ONLY)

a. Does your agency have a master plan? (check for yes) ☑ SerInfoWWAMP

Date ofcurrent master plan: 1/ 1/1985 Date of previuos master plan: 1/ 1/1976

b. Number of wastewater service connections in agency boundaries

Residential: 32,710 Commercial: 764 Industrial: 50

Other (specify) Multi-Family Amount of Other: 188

c. Number of wasterwater services in agency Sphere of influence, but outside boundarie

Residential: _____ Commercial: _____ Industrial: _____

Other (speficy): _____ Amount of Other: _____

Provide street address, assessor's parcel no. ect. for each connection outside agency boundaries

d. Number of wasterwater services outside agency boundaries and Spheres of Influence

Residential: _____ Commercial: _____ Industrial: _____

Other (specify) _____ Amount of Other: _____

Provide street address, assessor's parcel no. ect. for each connection outside agency boundaries

Agency Name: City of Simi Valley

e. Wastewater Service Connections:

Total number of wastewater service connections: 33712

Wastewater treatment facilities (provide for each facility): *include another sheet if necessary*

Location of treatment facilitie: 600 W. Los Angeles Ave.

Miles of Lines: _____ Type: Tertiary Capacity (MGD): 12.5

Year built: 1/ 1/1961 Year capacity last expanded: 1988

What permits are required for facilities: NPDES

Are required permits current (check box for yes) ☑

Does your agency have permit violations? (check box for yes) ☐

Is your agency applying for new permits or permit amendments? (check box for yes) ☐

If yes, what permits? _____

Locaton of treatment facilities: Various

Miles of lines: 500 Type: Various Capacity: _____

Year Built: 1/ 1/1960 Year capacity last expanded: 2003

What permits are required for facilities:

_____

Are required permits current (check box for yes) ☐

Does your agency have permit violations? (check box for yes) ☐

Is your agency applying for new permits or permit amendments? (check box for yes) ☐

If yes, what permits? _____

Agency Name: City of Simi Valley

8. Service Information

f. List current share activity with other service providers and provide a brief description

☐ Joint Power Authorities (JPA's)

_____

☐ Memorandums of Understanding (MOUs)

_____

☐ Service Agreements:

_____

☐ Purchasing Agreements:

_____

☐ Equipment Sharing:

_____

☐ Insurance Pools:

_____

☐ Joint Funding:

_____

☐ Other:

_____

g. Agency Function:

List Agency Functions that are Provided by:

Private Contractors: _____

Other: _____

Annual savings produced by using contractors/other agencies _____

Other?

_____

List any excess capacity, facilities or staff which can be made available by your agency

_____