

**VENTURA LOCAL AGENCY FORMATION COMMISSION**

---

**WATER AND WASTEWATER  
MUNICIPAL  
SERVICE REVIEW REPORT**

**January 2004**



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- A Summary of Agency Financial Information
- B. Determinations



## I. EXECUTIVE SUMMARY

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The service review process for the water and wastewater agencies in Ventura County started in January of 2003 and was completed in December of 2003 with the adoption of determinations for the 21 agencies located in the Ojai-San Buenaventura and Santa Clara service review areas. Determinations for the 15 agencies in the Calleguas Creek service review area were adopted by the Ventura LAFCO Commission in September of 2003.

The Ventura LAFCO service review process was designed to not only comply with the requirements of the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 but also to produce a useful end result for Ventura LAFCO. As part of the service review process, a database was developed which contains information about each of the 36 water and wastewater agencies as well as templates for service review information for all agencies in Ventura County. The information in the database will be used for other service reviews and subsequent LAFCO studies.

In addition, the service review process verified and corrected mapping information for all water and wastewater agencies and identified specific special study areas where additional analysis may be required. This information can be used by Ventura LAFCO to develop annual work programs and to prioritize LAFCO's allocation of staff resources.

All the 36 agencies addressed by the service review reports are listed in the following table. Of those agencies, 24 provide only water and/or wastewater services, have now completed the service review process and can be scheduled for sphere of influence studies. Eighteen (18) of the 24 agencies have few or no sphere issues and it is expected that their sphere updates will proceed with a minimal level of effort on the part of the Ventura LAFCO staff. The remaining six agencies have sphere issues and may require more analysis on the part of LAFCO staff.

Eleven (11) of the 36 agencies provide more services than just water and wastewater and will require subsequent service reviews. However, the database contains information that can be used for portions of those studies.

The law for service reviews requires LAFCO's to make determinations regarding potential governmental structure options for the agencies. Some water and wastewater agencies in Ventura County might reach greater economies of scale if they were to reorganize with another agency at some point in the future and the service review process identified eight (8) possible government structure options which are listed by letter in the following table.

Legal, economic, political and service barriers to each option were noted in the individual service review reports. One substantial obstacle is the level of analysis required to fully address each option on the part of the LAFCO and agency staff. For example, one potential government structure option included a reorganization of the five public agency water providers in the Ojai Valley area. A reorganization involving multiple agencies would require substantial effort on the part of the agencies and LAFCO staff. As an alternative, the service review report for the Ojai-San Buenaventura area suggested that Ventura LAFCO initiate the reorganization of the agencies, refer the proposal to a committee or request that the public agency water providers form a reorganization committee and return to LAFCO with a report and recommendations. Reorganization committees could be used with other potential governmental structure options.

Another alternative suggested in the service review reports was that Ventura LAFCO consider adopting a policy allowing a “zero” sphere of influence designation for those agencies that eventually should reorganize with another service provider. According to the policy, if developed, changes in boundaries for an agency with a zero sphere of influence might be prohibited or might require more in-depth analysis than for other spheres of influence. The intent of a zero sphere of influence designation is to encourage agency staffs and boards to work with potential successor agencies prior to a formal application to LAFCO. The agencies with a suggested zero sphere of influence are also listed in the following table.

AGENCY	POSSIBLE ZERO SPHERE	POSSIBLE REORGANIZATION OPTION
<b>SERVICE REVIEW PROCESS COMPLETE</b>		
<b>MINOR SPHERE ISSUES</b>		
Camrosa WD		Option A
Hidden Valley MWD		
Lake Sherwood CSD		
Meiners Oaks CWD	X	Option B
Montalvo MID	X	Option C
Ocean View MWD	X	Option D
Ojai Basin Groundwater MA	X	Option B
Ojai Water CD	X	Option B
Pleasant Valley CWD		
Saticoy SD	X	Option C
CSA # 29		
CSA # 30		
CSA # 32		
Waterworks # 1	X	Option E
Waterworks # 16		
Waterworks # 17		
Waterworks # 19		
Ventura Regional SD		
<b>SPHERE ISSUES</b>		
Calleguas MWD		
Camarillo SD		Option A
Fox Canyon Groundwater MA		
Ojai Valley SD		
Triunfo SD	X	Option G
Waterworks # 8		Option F

SUBSEQUENT SERVICE REVIEW STUDIES REQUIRED		
City of Camarillo		Option A
City of Fillmore		
City of Oxnard		Option D and H
City of Port Hueneme		Option H
City of San Buenaventura		Option C
City of Santa Paula		
City of Simi Valley		Option F
City of Thousand Oaks		
Casitas MWD	X	Option B
Channel Islands Beach CSD	X	Option H
United Water CD		Option D
Ventura River CWD	X	Option B

**Option A** includes the City of Camarillo, Camarillo SD and Camrosa WD. A discussion of the issues can be found in the Calleguas Creek service review report on page 47.

**Option B** includes the Casitas MWD, Meiners Oaks CWD, Ojai Groundwater MA, Ojai Water CD and Ventura River CWD. A discussion of the issues can be found in the Ojai-San Buenaventura service review report on page 39.

**Option C** includes the Montalvo MID, Saticoy SD and City of San Buenaventura. A discussion of the issues can be found in the Ojai-San Buenaventura service review report on page 42.

**Option D** includes the Ocean View MWD, United Water CD and City of Oxnard. A discussion of the issues can be found in the Santa Clara service review report on page 48.

**Option E** includes Waterworks District #1 and the City of Moorpark. A discussion of the issues can be found in the Calleguas Creek service review report on page 48.

**Option F** includes Waterworks District #8 and the City of Simi Valley. A discussion of the issues can be found in the Calleguas Creek service review report on page 48.

**Option G** includes the Triunfo SD. A discussion of the issues can be found in the Calleguas Creek service review report on page 49.

**Option H** includes the Channel Islands Beach CSD and the Cities of Port Hueneme and Oxnard. A discussion of the issues can be found in the Santa Clara service review report on page 41.

The service review process also identified areas of improvement that were beyond the scope of Ventura LAFCO's authority. Projections of population growth are critical for efficient planning for future water and wastewater service delivery and in Ventura County those projections are provided by a variety of agencies including the Department of Finance (DOF), Ventura Council of Governments (VCOG), Southern California Association of Governments (SCAG), Ventura County and the individual water and wastewater providers. While there is some coordination among the agencies in the source and methodology, the service review found fluctuations in population projections which make estimates of future service demands more difficult. In addition, population estimates for the boundaries of special districts are rarely provided by regional agencies. Agencies such as SCAG and Ventura County should be encouraged to develop standard protocols for projections as well as prepare population projections for special district boundaries and for municipalities.

It was also noted that agencies could avoid some costs by exploring the merger of separate agency Geographic Information System (GIS) systems. It was suggested that agencies participate jointly in special GIS systems such as that being developed for watershed data in the Calleguas Creek service review area and for Ventura LAFCO boundary and sphere maps.

Another issue that is beyond the scope of LAFCO to address is the need to have a source of easily obtainable information about private/mutual water purveyors. The service review process is only applicable to public water purveyors that come under the purview of LAFCO. The

Ventura County Public Works Agency is in the process of updating a the 1996 "Inventory of Public and Private Water Purveyors in Ventura County." This inventory provides valuable information regarding the full range of public and private water purveyors, but comprehensive water planning in Ventura County might be improved with the increased dissemination of information about private/mutual water companies.

Another related issue is the presence of private wells that are a significant source of water in Ventura County. Several agencies have data regarding wells within their boundaries but there is no single source of information that could be used for regional planning purposes. Planning for Ventura County's future infrastructure needs and deficiencies must also include appropriate data about wells.

Few areas of existing infrastructure deficiencies among the water and wastewater agencies were noted, however several agencies may face challenges in financing future infrastructure upgrades. The Cities of Fillmore and Santa Paula each face a significant issue of infrastructure deficiency and financing constraints, until there are more definitive plans for developing additional wastewater capacity,

Agencies generally had well-established budget processes and procedures that fully utilize opportunities to reduce or avoid costs. Some opportunities for future shared facilities and avoidance of costs were noted in the individual service review reports.

Similar financing opportunities and constraints were noted for all water and wastewater agencies. The cost to provide water and wastewater service will continue to increase as a result of greater demand and increased federal and state regulations. The largest single source of revenue (FY 2001-2002) for all the agencies was service charges/fees which represented approximately 85% of total revenues. The total amount of property tax received by the agencies (FY 2001-2002) was \$8.3 million. The largest category of aggregate reserve funds was designated for capital projects with amounts closely correlated to the agency's capital improvement plans. Operating and restricted debt reserves were the second and third largest categories of reserves, respectively.

Comparing rates among the diversity of agencies involved in the service review was difficult. The method of comparing rates used in the service review questionnaire did not yield useful information and the database will be revised using a standardized and equitable means of comparing water and wastewater rates.

Management efficiencies, local accountability and governance were also found to be efficient among most of the agencies. Meetings are typically held after normal working hours and are regularly scheduled and noticed. However, approximately 30% of the agencies do not maintain web sites which are an effective means of disseminating information, complying with environmental justice requirements and improving accountability to customers. No other significant issues were noted.

After adoption by the Ventura LAFCO of determinations for all 36 water and wastewater providers, this final report was prepared. This report consists of two separate documents. The first document includes this Executive Summary, each of the three service review reports, final determinations and financial summaries of each agency. The second document includes each agency's responses to the Ventura LAFCO service review questionnaire. Both documents can be used by Ventura LAFCO to complete spheres of influence for the agencies involved.

## II. BACKGROUND TO SERVICE REVIEWS

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### II.1 SERVICE REVIEW PROCESS

#### a) LAFCO's Responsibilities, Spheres of Influence and Municipal Service Reviews

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (California Government Code §56000 et seq.) mandates that each LAFCO conduct service reviews prior to or in conjunction with Sphere of Influence (SOI) studies and updates. LAFCOs are also required to review and update the SOI for all agencies not less than once every five years.

The statutory authority (§56430) for service reviews states that LAFCO must prepare an analysis and a written statement of determinations regarding each of the following:

- Infrastructure needs or deficiencies
- Growth and population projections for the affected area
- Financing constraints and opportunities
- Cost avoidance opportunities
- Opportunities for rate restructuring
- Opportunities for shared facilities
- Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers
- Evaluation of management efficiencies
- Local accountability and governance

Service reviews are intended to result in options and future studies which will promote more efficient service patterns, identify areas where service improvement is needed and assess the adequacy of service provision in relation to SOIs. Service reviews are not intended to directly change how services are provided; they are a tool to comprehensively review the major services, the delivery of those services, any issues with the efficient provision of service and potential actions by LAFCO that might address these issues, if any.

#### b) Description of Public Participation Process

The Ventura LAFCO water and wastewater service review process started in January 2003 with the preparation of a draft questionnaire. An initial kick-off meeting with all agencies involved in the water and wastewater service review was held to discuss issues and the draft questionnaire.

The final questionnaire, which was distributed to all 36 agencies, was divided into three parts. The first part asked for quantitative data and addressed the agency's services, finances and governance structure. Part I formed the basis of the subsequent database. The second part included questions based on the service review determinations and was intended to give the agencies an opportunity to provide qualitative responses.

The third part of the service review questionnaire consisted of a map with the agency's boundaries and SOI. Each agency was asked to note locations of facilities, overlapping areas of service and any illogical boundaries.

Follow-up interviews with most agencies were conducted; some agencies requested that interviews/meetings be held, if necessary, later in the process. All 36 agencies returned questionnaires although the format, quantity and quality of information returned varied significantly among the agencies. All information collected from the questionnaires was entered into the database, which contains more than 15,000 separate entries and will be used for future SOIs studies, service reviews and LAFCO reports. Due to the variation in information received from the agencies, improvements and refinements to the database are continuing throughout the process. To ensure accurate information, database reports for each agency were sent to all agencies for verification and correction.

Due to the diversity of agencies, services and issues, Ventura County was divided in three sub-regional areas roughly based on watershed boundaries. Agencies were included in only one sub-region although there might be overlap in service areas and issues. A separate, stand-alone service review report will be prepared for each sub-regional area.

Addressing service reviews on a sub-regional basis not only permitted a more focused analysis but also reduced the need for agencies to allocate staff resources to follow the LAFCO process. The agencies included within each service review sub-region are as follows. The service each agency provides is included in Exhibit II.1, Water and Wastewater Municipal Service Review Agencies.

#### Calleguas Creek Watershed Service Review Area (15 agencies)

- City of Camarillo
- City of Simi Valley
- City of Thousand Oaks
- Calleguas Municipal Water District
- Camarillo Sanitary District
- Camrosa Water District
- Hidden Valley Municipal Water District
- Lake Sherwood Community Services District
- Pleasant Valley County Water District
- Triunfo Sanitation District
- Ventura County Waterworks District No. 1
- Ventura County Waterworks District No. 8
- Ventura County Waterworks District No. 17
- Ventura County Waterworks District No. 19
- Ventura Regional Sanitation District

#### Ojai/Ventura Service Review Area (11 agencies)

- City of San Buenaventura
- Casitas Municipal Water District
- Meiners Oaks County Water District
- Montalvo Municipal Improvement District
- Ojai Groundwater Management Agency
- Ojai Valley Sanitary District
- Ojai Water Conservation District
- Saticoy Sanitary District
- Ventura County Service Area No. 29

**EXHIBIT II.1  
WATER AND WASTEWATER MUNICIPAL SERVICE REVIEW AGENCIES**

Agency	WATER SERVICES							WASTEWATER SERVICES			
	Retail Domestic Potable Water	Wholesale Water	Water Treatment	Recycled-Reclaimed Water	Agricultural Water	Groundwater Management	Water Replenishment	Water Conservation	Sanitary Sewer Collection	Sanitary Sewer Treatment	Septic System Monitoring & Maintenance
<b>Calleguas Creek Watershed</b>											
City of Camarillo	X	D						D			
City of Simi Valley				C					X	D	D
City of Thousand Oaks	X	D		C				D	X	D	D
Calleguas Municipal Water District	X		D	D	D	D	D	D			
Camarillo Sanitary District									X	D	D
Camrosa Water District	X	D		D	D	D	D	D	X	D	D
Hidden Valley Municipal Water District	X	D									
Lake Sherwood Community Service District	X	D									
Pleasant Valley County Water District	X				C						
Triunfo Sanitation District	X	C		C					X	C	C
Ventura County Waterworks District No. 1	X	D		D	D	D		D	X	D	D
Ventura County Waterworks District No. 8	X	D		D	C	D	D	D			
Ventura County Waterworks District No. 17	X	D				D					
Ventura County Waterworks District No. 19	X	D		D							
Ventura Regional Sanitation District	X					D			X	D	C
<b>Ojai/Ventura Agencies</b>											
City of San Buenaventura	X	D		D	D	D		D	X	D	D
Casitas Municipal Water District	X	D	D	D	D	D	D	D	X	D	
Meiners Oaks County Water District	X	D		D							
Montalvo Municipal Improvement District									X	D	D
Ojai Groundwater Management Agency	X						D				
Ojai Valley Sanitary District									X	D	D
Ojai Water Conservation District	X						D	D	D		
Saticoy Sanitary District									X	D	D
Ventura County Service Area No. 29									X	D	D
Ventura County Service Area No. 32									X		D
Ventura River County Water District	X	D		D							
<b>Santa Clara Watershed</b>											
City of Fillmore	X	D		D				D	X	D	D
City of Oxnard	X	D		D		D		D	X	D	D
City of Port Hueneme	X	D	C	C	C			D	X	D	C
City of Santa Paula	X	D		D			D	D	X	D	C
Channel Islands Beach Community Services Dist.	X	D		C	D		D		X	D	C
Fox Canyon Groundwater Management Agency	X						C				
Ocean View Municipal Water District	X	D									
United Water Conservation District	X		D	D		D	D	D			
Ventura County Service Area No. 30									X	D	D
Ventura County Waterworks District No. 16									X	D	D

SERVICES PROVIDED = X (D=Direct, C=Contracted)

- Ventura County Service Area No. 32
- Ventura River County Water District

**Santa Clara Watershed Service Review Area (10 agencies)**

- City of Fillmore
- City of Oxnard
- City of Port Hueneme
- City of Santa Paula
- Channel Islands Beach Community Services District
- Fox Canyon Groundwater Management Agency
- Ocean View Municipal Water District
- United Water Conservation District
- Ventura County Service Area No. 30
- Ventura County Waterworks District No. 16

A copy of each service review report and agency determinations was given to Ventura LAFCO staff and their recommended changes were incorporated into a draft report. The draft municipal service review report was distributed to each agency in the service review area. The final draft report incorporated recommendations and corrections from the affected agencies.

The Ventura LAFCO Commission completed the water and wastewater service review process in December of 2003. After adoption of the determinations by the Ventura LAFCO Commission, Ventura LAFCO staff will begin to schedule the updates of the SOIs for the agencies.

## **II.2 FEDERAL, STATE AND LOCAL REGULATORY REQUIREMENTS**

This background section is a brief overview of the current regulations for water and wastewater systems and is intended to provide basic information for those who may be unfamiliar with the complex and detailed regulatory requirements.

Numerous federal, state and local laws and agencies regulate water and wastewater. Some of the state and regional plans and policies build upon the federal legislation. In other instances, federal acts have established broad goals, which are to be achieved through implementation at the state and/or local levels. Finally, there are some regulations that are unique to California.

There can be considerable and confusing overlap among the agencies, regulations and associated acronyms. The following section identifies a few of the major federal, state and local regulatory bodies and requirements for both water and wastewater programs.

### **a) Federal Laws and Regulations**

The Clean Water Act (CWA), enacted in 1972, and the Safe Drinking Water Act (SDWA), enacted in 1974, are the two major federal laws that regulate the nation's water resources. A brief overview of relevant portions of the CWA is provided below<sup>1</sup>:

#### **Federal Water Pollution Control Act of 1972 (Clean Water Act or CWA)**

The CWA, with its amendments, is the principal law governing the nation's streams, lakes, and estuaries. It contains regulatory provisions that impose progressively more stringent

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<sup>1</sup> Calleguas Creek Watershed Management Plan, 2003. The Rick Alexander Company.



requirements on industries and cities to reduce pollution and meet the goal of zero discharge of pollutants.

The CWA established as national goals the elimination of pollutant discharges to the navigable waters and the assurance that all navigable waters would be fishable and swimmable. It also established the following regulatory standards:

- No one has the right to pollute the navigable waters of the United States. Dischargers are required to obtain permits.
- Permits shall set limits on the concentration of the pollutants being discharged. A violation of the limits carries a penalty of fines or imprisonment.
- The best technology available shall be used to control the discharge of pollutants.

Other applicable sections of the CWA include:

1. Section 303(d) – Impaired Waters List and Total Maximum Daily Loads
2. Section 319 – Non-point Source Management Program
3. Section 401 – State Water Quality Certification Program
4. Section 402 (p) – The National Pollutant Discharge Elimination System
5. Section 404 – Permits for Dredged or Fill Materials

#### **CWA Section 303(d) – Impaired Waters List and Total Maximum Daily Loads**

This requires each state to identify waters that do not meet water quality standards after application of technologically-based controls. Applicable water quality standards include designated beneficial uses and adopted water quality objectives. Waterways are identified as designated Water Quality Limited Segments (WQLSs) and are prioritized for purposes of developing Total Maximum Daily Loads (TMDLs) and establishing Waste Load Allocations (WLAs) as well as Load Allocations (LAs). The TMDL is the sum of waste load allocations (WLAs) for point sources of pollution, load allocations (LAs) for non-point sources of pollution and natural background sources. Essentially the TMDL is the amount of a pollutant that can be discharged into a water body and still maintain water quality standards.

#### **CWA Section 319 – Non-point Source Management Program**

Section 319 regulates non-point source pollutants, which enter water from diffuse sources. Non-point source pollutants are often chemicals from lawns, automobile residues or urban runoff that enter the wastewater stream and water supply in large quantities and sudden surges, largely due to storms. Although California adopted a Non-point Source Management Plan (NPSMP) in 1988, cities and counties have only recently begun adopting local implementing rules and regulations. Control of this type of pollution has proven to be difficult and is expected to require costly upgrades in existing facilities and permit costs, particularly for wastewater facilities with high rates of infiltration.

#### **CWA Section 401 – State Water Quality Certification Program**

Prior to the issuance of federal CWA permits, the State Water Resources Control Board, through the regional boards, certifies the quality of surface waters pursuant to Section 401 of the Clean Water Act. Section 401 requires that activities/facilities discharging pollutants into waters must obtain a state water quality certification permit proving that the activity complies with all applicable water quality standards, limitations, and restrictions.

#### **CWA Section 402 – National Pollutant Discharge Elimination System (NPDES)**

Municipalities, Publicly Owned Treatment Works (POTWs), and most industries in the United States are now required to obtain an NPDES permit for discharges, including storm water runoff. NPDES permits regulate discharge of “pollutants from point sources to waters of the United States” to ensure that the discharges do not adversely affect surface water quality or beneficial uses. NPDES permits are authorized by Section 402 of the Clean Water Act and Section 13370 of the California Water Code and the California Code of Regulations, Title 23, Chapters 3 and 4. The responsibility for issuing NPDES permits in California has been delegated to the regional water quality control boards, subject to review and approval by the Regional Administrator (US EPA Region IX, San Francisco).

#### **CWA Section 404 – Permits for Dredged or Fill Materials**

Clean Water Act Section 404 permits are issued for the placement of dredged or fill materials into water including wetlands. The Section 404 permitting process is designed to ensure that the chemical, physical, and biological functions of the waters are protected. It includes mandatory measures to avoid, minimize, and mitigate impacts. The Section 404 permitting process is administered by the U.S. Army Corps of Engineers.

#### **Coastal Zone Act: Reauthorization Amendments (CZARA) Section 6217 (g)**

The US EPA has identified measures to protect coastal waters from non-point source pollutants from agriculture. Specifically, the measures address erosion from cropland, application of nutrients/pesticides, confined animal facilities, grazing land, and cropland irrigation.

#### **Safe Drinking Water Act of 1974 (SDWA)**

The SDWA required the EPA to identify potentially harmful contaminants in drinking water and to specify a maximum contaminant level for each contaminant. Water supply systems must meet these standards by using the best technology that is economical, available and technologically feasible.

The SDWA was amended in 1996 to require states to identify potential contamination threats and determine the security of drinking water sources. The amendment also required that qualified professionals operate water systems although California had already established a certification program. Other requirements include the following:

#### **Consumer Confidence Reports**

Since 1999, public water systems must provide their customers with an annual water quality report providing data about the quality of the local drinking water, compliance with EPA's safety standards, sources of any contaminants, and potential health risks. The annual reports are included with water bills for systems with more than 10,000 customers; for smaller systems the information can be posted at a central location or published in local newspapers.

#### **Water Conservation Plans**

In 1998, the EPA issued guidelines for water conservation plans for public water systems. Now states may require a water system to submit a water conservation plan consistent with the EPA guidelines as a condition of receiving a loan.

## Groundwater Standards

Most Americans rely on groundwater as their source of drinking water and tap water and several SDWA rules regulate groundwater protection. It protects underground sources of drinking water under the Underground Injection Control (UIC) program.

### Proposed Arsenic Standard

The EPA established the maximum allowable limit for arsenic in drinking water from 50 parts per billion (ppb) down to 5 ppb. Arsenic can produce a variety of health-related problems, including cancer, cardiovascular disease, neurological damage, and diabetes. Many water supplies in California are significantly higher than the 5 ppb level and would not meet the proposed standard without additional (and possibly very costly) treatment.

## b) California Laws and Regulations

### Porter-Cologne Water Quality Control Act of 1970

The California Water Code (CWC) is the principal state regulation governing the use of water resources within the State of California. This law controls water rights, the construction and management of dams and reservoirs, flood control, conservation, development and utilization of state water resources, water quality protection and management, and management of water-oriented agencies. The water quality provisions set forth in the CWC have been written to supplement provisions of the Health and Safety Code, Public Resources Code, Fish and Game Code, Food and Agriculture Code, Government Code, Harbors and Navigation Code, California Environmental Quality Act (CEQA) and California Endangered Species Act.

Division 7 of the CWC, the Porter-Cologne Water Quality Control Act of 1970, California 13000 to 14958, regulates water quality and pollution issues within California by protecting water quality and beneficial uses of all state waters. The Porter-Cologne Act is administered regionally by the State Water Resources Control Board and California Regional Water Quality Control Boards (RWQCB). While administration occurs at a regional level, regulations are promulgated on a statewide level to provide consistency. Aspects of the Porter-Cologne Act are similar to federal water quality regulations and programs.

The SWRCB and regional offices have broad powers and implement the CWA through the adoption of plans and policies, the regulation of discharges, the regulation of waste disposal

### California vs. Federal Regulations

#### Rules

California is fully authorized to administer the National Pollutant Discharge Elimination System (NPDES) for wastewater dischargers and follows federal standards for most effluent discharges and has procedures for obtaining wastewater discharge variances.

#### Administration and Enforcement

Regional WQCBs are responsible for the administration and enforcement of the water pollution control regulations in California.

#### Wastewater Permits

California has established its own fee structure for wastewater discharges into surface waters and storm water discharge permitting plans.

#### Monitoring

California requires monitoring of both surface water and groundwater and has established extensive recordkeeping requirements.

#### Operating Standards and Requirements

California has established effluent limitations, standards for pretreatment and thermal discharge standards. Some industries and publicly owned treatment works may be affected by additional monitoring requirements (California Toxics Rule).

#### Variations

The State also has procedures in place for dischargers to obtain alternate permit limitations.

#### Noncompliance

California has significant penalties for violations of its water pollution control regulations.

sites and the cleanup of hazardous materials and other pollutants. It also requires reporting of unintended discharges of any hazardous substance, sewage, or oil/petroleum product.

**Proposition 65**

California's Safe Drinking Water Act, Proposition 65, regulates water facilities with 10 or more employees that manufacture, package, or operate in California or sell products in California. The Act prohibits these facilities from deliberately discharging listed chemicals into sources of drinking water.

**Cal-Fed Water Program**

The Cal-Fed is a multi-agency cooperative water program that was created to address water issues and disputes in the State of California. Program participants include a wide range of special interests.

### III. CALLEGUAS CREEK WATERSHED

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#### III.1 CALLEGUAS CREEK WATERSHED EXECUTIVE SUMMARY

Municipal service reviews are a new requirement for LAFCOs and were intended to promote more efficient services, to identify areas of improvement and to assess service provision in relation to boundaries and spheres of influence (SOI). Service reviews do not directly change the provision of service but are sources of comprehensive information LAFCO can use in future actions.

LAFCO must conduct service reviews prior to or in conjunction with the mandated five-year schedule for updating SOIs. The service review report must include an analysis of the issues and written determinations for each of the following:

- Infrastructure needs or deficiencies;
- Growth and population projections for the affected area;
- Financing constraints and opportunities;
- Cost avoidance opportunities;
- Opportunities for rate restructuring;
- Opportunities for shared facilities;
- Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers;
- Evaluation of management efficiencies; and
- Local accountability and governance.

The service review process for the water and wastewater agencies in Ventura County started in January of 2003 and will be completed in November of 2003. It began with a meeting of the agencies to discuss issues and to receive input on a three-part draft questionnaire. The questionnaire, which was sent to all 36 agencies, requested data on quantitative, qualitative and boundary issues. All the agencies were contacted individually and approximately 80 hours of interviews with staff and board members were conducted.

To ensure more focused analysis on service issues, Ventura County was divided into three sub-regional areas which were roughly based on watershed boundaries. The three sub-regional service review areas are the Calleguas Creek, Santa Clara and Ojai-San Buenaventura areas. Each of the 36 agencies was placed in only one sub-regional area although service issues might overlap into more than one sub-regional area. This service review report addresses the agencies located within the Calleguas Creek watershed and includes the following fifteen agencies:

- City of Camarillo
- City of Simi Valley
- City of Thousand Oaks
- Calleguas Municipal Water District
- Camarillo Sanitary District
- Camrosa Water District
- Hidden Valley Municipal Water District
- Lake Sherwood Community Services District
- Pleasant Valley County Water District
- Triunfo Sanitation District
- Ventura County Waterworks District No. 1
- Ventura County Waterworks District No. 8
- Ventura County Waterworks District No. 17
- Ventura County Waterworks District No. 19
- Ventura Regional Sanitation District

A database was designed with Ventura LAFCO staff and the each agency's response to the questionnaire was entered into it. The database, which currently has approximately 15,000 entries, will be used for subsequent service reviews, sphere of influence studies and other Ventura LAFCO studies and analysis. The database can be changed and modified as the need and use for information becomes more focused.

The mapping information submitted by the agencies identified areas outside each agency's boundaries where service was currently being provided, areas of overlap with other agencies and illogical service boundaries. These areas were mapped and have been labeled as "special study areas" for use in subsequent sphere of influence studies.

Service issues and associated improvements identified during the process are addressed in more detail in the body of this report and are briefly summarized in the following paragraphs. While some suggested improvements are beyond the purview of LAFCO, they have been included to provide a comprehensive overview of the provision of water and wastewater services in Ventura County.

Infrastructure needs and deficiencies are assessed on a regular basis by agencies. However, some agencies with voter-approved urban limit lines have water and wastewater master plans which could be updated to reflect revised growth projections. There are numerous private and mutual service providers in Ventura County and information regarding their infrastructure needs, services, facilities, rates and budgets should be integrated into the public planning process. While including this information is beyond the scope of this service review and of LAFCO, it remains critical for comprehensive and regional water and wastewater planning.

Population and growth projections used by the agencies in the service review were generally similar. However, to more accurately predict future regional service needs, developing a generally accepted, consistent source and methodology for projecting future growth and population would be invaluable.

To avoid costs and increase shared facilities, sharing information and data among each agency's GIS systems, as is currently being studied by the Calleguas Creek Water Management Plan, could also improve regional water and wastewater planning. For example, some discrepancies between maps of SOIs and jurisdictional boundaries developed by agencies and those used by Ventura LAFCO were noted. It is suggested that the LAFCO GIS system be used as the "official" source of SOI and boundary information in Ventura County to avoid inconsistencies in mapping.

It was difficult to find a means of comparing rates from the diversity of agencies involved in the service review in order to provide meaningful information. The database is being revised to compare water rate information based on size of meters, connection fees or other more appropriate data. Data from the State Water Resources Control Board comparing wastewater rates was used in this service review report.

Some of the water and wastewater agencies in Ventura County might reach greater economies of scale if they were to reorganize with another agency at some point in the future and it is suggested that Ventura LAFCO consider adopting a policy allowing a "zero" sphere of influence designation for such agencies. A zero SOI would not lead to an immediate reorganization of the agency but would indicate that in the future an agency that shares boundaries, services and/or other facilities with another agency might want to consider if efficiencies can be gained through a reorganization. While there may be legal, economic and service provision issues that could

prevent a reorganization, the discussion of service provision, overlapping boundaries and future reorganizations is a central part of any sphere of influence update. In the Calleguas Creek watershed service review area, a zero sphere designation might be considered for Waterworks District # 1, which primarily serves the City of Moorpark, Waterworks District #8, which primarily serves the City of Simi Valley, and the Triunfo SD.

Some of the water and wastewater agencies had no issues associated with provision of services or boundaries and updating their spheres of influence will require relatively little analysis. Two agencies may require more analysis by the Ventura LAFCO staff--the City of Camarillo and the Camarillo SD have several areas of discrepancy between CURB limits, service areas and spheres. The Calleguas MWD service area/SOI and its relation to the service areas of the City of Oxnard and to the service area of the Metropolitan Water District (MWD) may also require additional analysis.

Based on the service review process, it can be concluded that the agencies addressed in the Calleguas Creek watershed service review area are providing efficient, cost-effective services. All the agencies are effectively pursuing management efficiencies, cost avoidance opportunities and shared facilities. Local accountability and governance were also found to be efficient. However, the Triunfo SD should examine the possibility of having an additional board member elected to improve their accountability to local ratepayers. Such a change in the governance structure might require legal review to ensure that any change is consistent with the agency's enabling legislation.

## **III.2 PUBLIC AGENCY PROFILES**

### **a) Subregional Areas and Agencies**

Of the fifteen public agencies in the Calleguas Creek watershed service review area, eight provide water service, one provides wastewater service and six provide some form of water and wastewater services. Most agencies provide service directly although some agencies contract for water and wastewater services with other entities. One agency, the Triunfo SD, does not provide either water or wastewater service directly but contracts for all services through joint powers agreements (JPAs) or similar arrangements. Ten of the fourteen water agencies provide potable water directly to customers and one agency, the Calleguas MWD, provides wholesale water service to retail water purveyors. While historically the Calleguas MWD has served solely as a water supply wholesaler, the agency is authorized to provide retail service.

Each agency's services and service area are described below. Exhibit III.1, Calleguas Creek Watershed Service Review Agencies, shows the services each agency provides in a tabular format.

#### **Calleguas Watershed Sub-regional Service Review Area**

- **Calleguas MWD**

*The Calleguas MWD supplies potable water on a wholesale basis to public, private and mutual water purveyors located in the communities of Camarillo, Moorpark, Oak Park, Oxnard, Port Hueneme, Simi Valley, Thousand Oaks as well as unincorporated areas in southwestern Ventura County. The agency also distributes recycled water and participates in regional conservation and power programs. As a regional wholesaler, the Calleguas MWD plays a unique role in providing water service to retail agencies and as such the agency's operations*

*and fiscal standing are not directly comparable to the retail water purveyors discussed in this report.*

- **Camarillo SD**

*The Camarillo SD provides wastewater collection and treatment and industrial waste pretreatment programs to a service area located in and around the City of Camarillo. The Camarillo SD is a dependent district with the City of Camarillo City Council acting as the governing board for the agency.*

- **Camrosa WD**

*The Camrosa WD provides potable water, water reclamation/distribution, wastewater collection/treatment and power generation. Its service area encompasses approximately 31 square miles and includes the Tierra Rejada and Santa Rosa Valleys, the eastern portion of the City of Camarillo and the California State University, Channel Islands, campus.*

- **City of Camarillo**

*The City of Camarillo provides potable water service and water conservation programs to its residents.*

- **City of Simi Valley**

*The City of Simi Valley provides wastewater service to city residents and to nearby unincorporated areas. Water service is administered through Waterworks District #8 and Southern California Water Company, a private water company.*

- **City of Thousand Oaks**

*The City of Thousand Oaks provides water services to approximately 40% of the City and to small portions of the surrounding unincorporated community and wastewater service to approximately 90% of the City as well as portions of the surrounding unincorporated area.*

- **Hidden Valley MWD**

*The Hidden Valley MWD monitors growth and development, water demand and water supplies for 37 ranches served potable water by more than 100 private wells. The agency does not provide direct water service.*

- **Lake Sherwood CSD**

*The Lake Sherwood CSD provides potable water and all related administrative services to the community of Lake Sherwood. The Ventura County Board of Supervisors is the governing body of the agency.*

- **Pleasant Valley CWD**

*The Pleasant Valley CWD provides irrigation water to approximately 11,000 acres located on the Oxnard Plain.*

- **Triunfo SD**

*The Triunfo SD provides potable water, sewage collection, and pumping of reclaimed water to approximately 50 square miles in the southeastern portion of Ventura County. The agency provides service through a contract with the Ventura Regional Sanitation District and through a JPA with the Las Virgenes MWD.*



- **Waterworks District #1**

*The Ventura County Waterworks District #1 provides water and wastewater services, including all related administrative functions, to the City of Moorpark and unincorporated areas to the north and east. The Ventura County Board of Supervisors is the governing body of the agency.*

- **Waterworks District #8**

*The Ventura County Waterworks District #8 provides water service, including all administrative functions, to portions of the City of Simi Valley and unincorporated areas of Ventura County. The City Council of Simi Valley is the governing board for Waterworks District #8.*

- **Waterworks District #17**

*The Ventura County Waterworks District #17 provides water service, including all related administrative functions, to customers in the unincorporated community of Bell Canyon and contiguous areas to the north. The Ventura County Board of Supervisors is the governing body of the agency.*

- **Waterworks District #19**

*The Ventura County Waterworks District #19 provides water service, including all related administrative functions, to customers in the unincorporated community of Somis and surrounding areas. The Ventura County Board of Supervisors is the governing body of the agency.*

- **Ventura Regional SD**

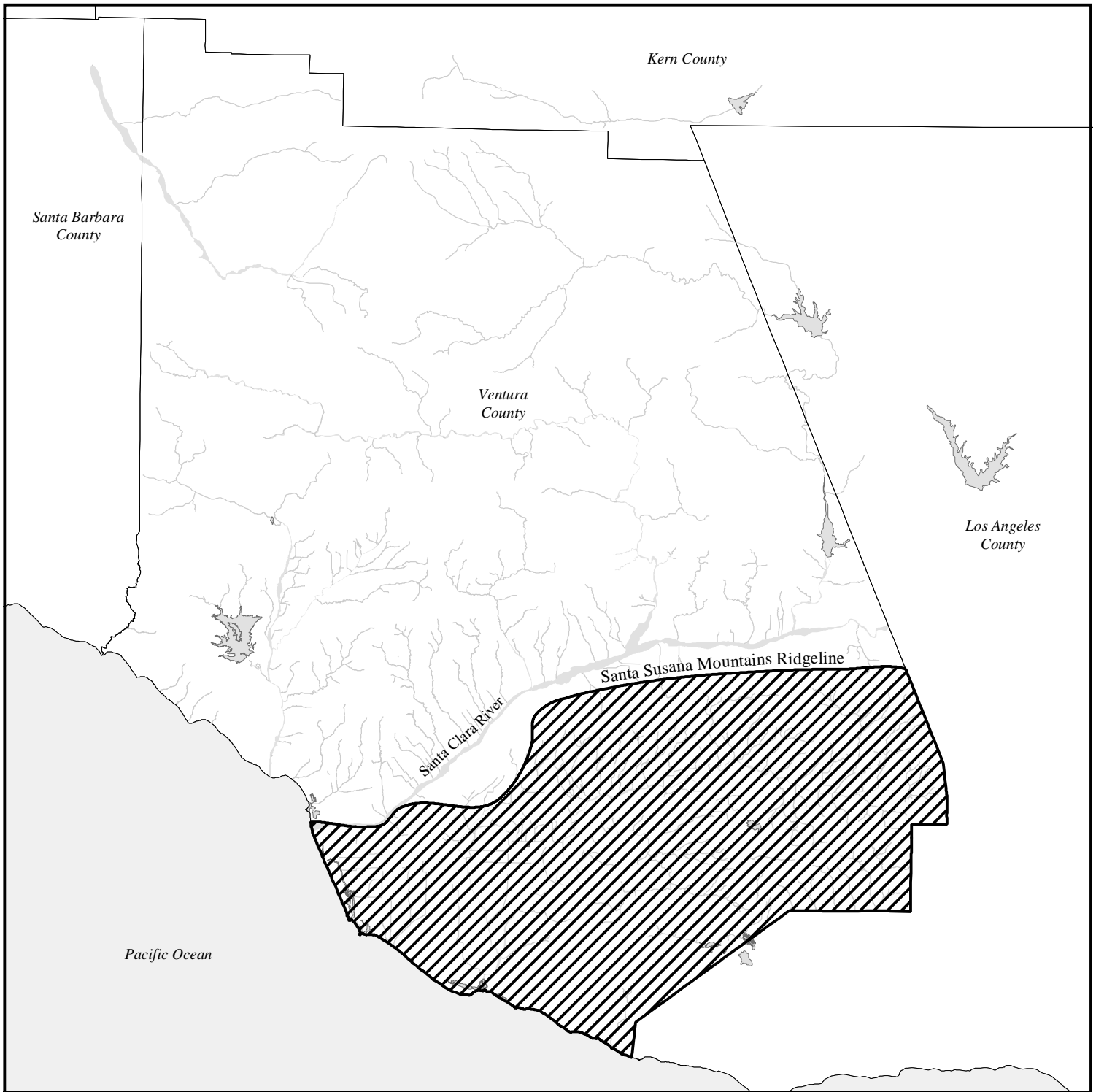
*The Ventura Regional SD provides support services to various water and wastewater agencies in Ventura County.*

Figure II.1, Calleguas Creek Watershed Service Review Area, shows the regional location and general boundaries of the service review area addressed in this report.


**Exhibit III.1  
 Calleguas Creek Watershed Service Review Agencies**

Calleguas Creek Watershed	WATER SERVICES	Retail Domestic Potable Water	Wholesale Water	Water Treatment	Recycled-Reclaimed Water	Agricultural Water	Groundwater Management	Water Replenishment	Water Conservation	WASTEWATER SERVICES	Sanitary Sewer Collection	Sanitary Sewer Treatment	Septic System Monitoring & Maintenance
	City of Camarillo	X	D							D			
City of Simi Valley					C					X	D	D	
City of Thousand Oaks	X	D			C				D	X	D	D	
Calleguas Municipal Water District	X		D	D	D	D	D	D	D				
Camarillo Sanitary District										X	D	D	
Camrosa Water District	X	D		D	D	D	D	D	D	X	D	D	
Hidden Valley Municipal Water District	X	D											
Lake Sherwood Community Service District	X	D											
Pleasant Valley County Water District	X					C							
Triunfo Sanitation District	X	C			C					X	C	C	
Ventura County Waterworks District No. 1	X	D		D	D	D			D	X	D	D	
Ventura County Waterworks District No. 8	X	D		D	C	D	D		D				
Ventura County Waterworks District No. 17	X	D				D							
Ventura County Waterworks District No. 19	X	D		D		D							
Ventura Regional Sanitation District	X					D				X	D	C	

**Services Provided = X (D= Direct, C=Contracted)**



**LEGEND**

 Calleguas Creek Watershed Service Area

# Ventura LAFCO Calleguas Creek Watershed Service Review Area

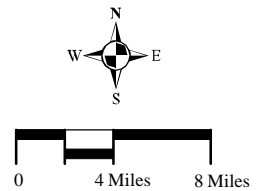


Figure III.1

Copyright 2002 by County of Ventura. Design, maps, index and text of this map are copyrighted. It is unlawful to copy or reproduce, either in digital or paper form, any part thereof for personal use or resale.

Warning: This map was created by the Ventura County Computer Aided Mapping System (CAMS), which is designed and operated solely for the convenience of the County and related public agencies. The County does not warrant the accuracy of this map and no decision involving a risk of economic loss or physical injury should be made in relation thereon.

Accurate as of 7/28/03



### III.3 GROWTH AND POPULATION

With 1,864 square miles, Ventura County is in the median range for size among California's 58 counties, but ranks 11th in population with a Census 2000 count of 753,000. The County's median household income is just under \$60,000, which is higher than both the State average and that of nearby counties.

The urban density in Ventura County rose from 7.61 people per acre in 1990 to 7.75 in 2000, which mirrors the statewide trend of increasing urban densities. From 1990 to 2000, the County's population grew by 11.2% while the amount of urbanized land increased by approximately 9%.

One of the fastest growing areas in Ventura County is the "East County," which includes the cities of Thousand Oaks, Simi Valley and Moorpark, one of the fastest growing cities in the state.<sup>2</sup>

Using data from the Ventura Council of Governments (VCOG), the following table (Table III.1, Calleguas Creek Service Review Area Population Projections) has been developed:

TABLE III.1 CALLEGUAS CREEK SERVICE  
REVIEW AREA POPULATION PROJECTIONS

	FORECAST 2005	FORECAST 2010	FORECAST 2015	FORECAST 2020	FORECAST 2025
Population	392,442	410,331	423,425	441,545	452,694
Dwelling Units (DU)	135,213	143,040	147,252	153,168	157,090
<b>Countywide Total</b>	<b>796,387</b>	<b>836,186</b>	<b>874,881</b>	<b>915,005</b>	<b>951,080</b>
<b>DOF Totals for Ventura County</b>	<b>818,600</b>	<b>877,400</b>	<b>934,000</b>	<b>1,007,200</b>	

Department of Finance population projections were included as a comparison to VCOG data.

The Calleguas MWD, which is the primary water supplier for more than 70 percent of the residents of Ventura County, prepared a nexus study for its fee structure in 2002. Information in Table III.2, Population Projections for the Calleguas MWD Service Area, is taken from that study. Overall, these projections show a 23 percent increase for Calleguas MWD service area over the next 20 years. Much of the growth is concentrated in the cities of Camarillo, Moorpark and Simi Valley.

<sup>2</sup> "SMART GROWTH IN ACTION, PART 2: CASE STUDIES IN HOUSING CAPACITY AND DEVELOPMENT FROM VENTURA COUNTY, CALIFORNIA". William Fulton, Susan Weaver, Geoffrey F. Segal, Lily Okamura. June 2003

TABLE III.2  
POPULATION PROJECTIONS FOR CALLEGUAS MWD SERVICE AREA

COMMUNITY	2000	2005	2010	2015	2020
City of Camarillo	75,056	82,809	89,084	93,014	96,949
Las Posas	3,547	3,666	3,788	3,911	4,034
City of Moorpark	30,904	31,777	32,561	33,346	42,108
Oak Park	12,544	13,541	13,541	13,541	13,541
City of Simi Valley	116,172	131,099	135,621	140,994	145,700
City of Thousand Oaks	125,426	129,550	135,736	138,619	139,213
<b>Total</b>	<b>365,651</b>	<b>394,449</b>	<b>412,343</b>	<b>425,442</b>	<b>443,567</b>

Data source: Calleguas MWD Nexus Study; Ventura Council of Governments 2000 Forecast Data

Agencies included in the service review were asked to provide the estimated population as of 1/2003 for their existing service area. The data is summarized in Table III.3, Agency Projections of Current Population. Discrepancies between existing population estimates for the Calleguas MWD service area and as provided by agencies are primarily the result of differences in service areas.

All agencies answering the question “How does your agency determine the projected growth within its current boundaries including sphere of influence?” referenced using the population projections prepared by the Southern California Association of Governments (SCAG), the Ventura Council of Governments (VCOG) and Ventura County. The population projections provided by the agencies varied and although they are relatively consistent, the differences can become significant. The differences seem to be the result of agencies using different sources and methods for projections.

During interviews with the water and wastewater agencies in Ventura County, the lack of a generally accepted, consistent source and methodology for projecting future growth and population projections was noted. While this can be a significant issue when agencies are coordinating plans for regional service delivery, it is a problem common to many counties in California. No other significant issues were noted.

TABLE III.3  
AGENCY PROJECTIONS OF  
CURRENT POPULATION

AGENCY	ESTIMATED POPULATION 1/2003
Camarillo*	60,546
Simi Valley	115,000
Thousand Oaks	109,000
Camrosa WD	35,000
Hidden Valley MWD	120
Lake Sherwood CSD	1,450
Pleasant Valley CWD	2,000
Triunfo SD	30,000
Waterworks #17	1,927
Waterworks #19	2,252
<b>Total</b>	<b>248,404</b>

\* Estimate from both the City of Camarillo and the Camarillo SD

### III.4 INFRASTRUCTURE

The legislation requiring service reviews provided little direction to LAFCOs for evaluating infrastructure needs and deficiencies. The Governor's Office of Planning and Research (OPR) developed draft Service Review Guidelines in 2003 but as of the date of this report the Guidelines were still in draft form. The Draft OPR Guidelines included twelve suggested factors

LAFCOs could use in identifying an agency's infrastructure needs and deficiencies. Several of the factors, including governmental structure options, duplicative facilities and locations of facilities, have been addressed in other portions of this report.

The Ventura LAFCO service review questionnaire used the presence and frequency of master plans as well as an annual capital improvement (CIP) budget as a means of assessing an agency's process of evaluating infrastructure needs and deficiencies. Master plans and CIPs, as plans for future service needs, are public documents reviewed the governing body, other affected agencies and the public. Agencies that are small, provide limited service, or are fully built-out may not have master plans; however, most public agencies prepare annual CIP budgets as a means of meeting current and future service needs.

Agencies were asked to report the date of the current master plan and previous master plan. While there are no established standards for the frequency of preparation, typically master plans for water and wastewater agencies are prepared every 5-10 years. The type of service area (i.e., level of development, rate of growth or presence of growth control initiatives) can also affect the frequency of preparation.

Four agencies (Hidden Valley MWD, Pleasant Valley CWD, Ventura Regional SD and the Triunfo SD) reported no formal master plans. The Hidden Valley MWD is a small agency encompassing approximately 5,000 acres. The 37 ranches in the agency receive water from more than 100 private wells. Since the agency does not provide direct water service to the residents, there is no need for a master plan. While the future need for service is limited, the District is working with the County to document and map active wells within their boundaries in order to maintain accurate records of groundwater usage. The Hidden Valley MWD is also discussing the possibility of developing an emergency back-up water supply with adjacent private and public water purveyors.

Private wells and their impact on groundwater supplies is an ongoing concern throughout Ventura County. Not all active wells in Ventura County are metered and this is a significant obstacle to accurately gauging groundwater supply. It is suggested that the Hidden Valley MWD as well as all other water purveyors in Ventura County encourage the metering of all wells to provide comprehensive data which can be collected and used for regional water projections.

The Pleasant Valley CWD serves 39 retail and 118 agricultural customers in a service area of approximately 11,000 acres. As territory develops, it is typically detached from the agency. The District uses its annual CIP program to address existing infrastructure needs and deficiencies.

The Triunfo SD noted that while the agency does not have a water master plan, per se, it is a member of the California Urban Water Conservation Council. It includes annual Best Management Practices reports in its Urban Water Management Plan, which is updated every five years and filed with the State of California. Also while the Triunfo SD does not have an individual wastewater master plan, it was included in the 2000 master plan prepared by its joint venture partner, Las Virgenes Municipal Water District.

The Ventura Regional Sanitation District provides staff and support through contracts to other agencies and relies on the master plans of those agencies to determine infrastructure needs and deficiencies.

Table III.4, Master Plans and CIPs, shows the agencies and information regarding master plans and capital improvements budgets. One issue noted during the service review is that some

agency master plans have not been updated since voters approved the urban limit lines for a majority of Ventura County cities. Since the urban limit lines significantly affect the rate and location of growth, agencies should consider updating and coordinating master plans to be consistent with the mandates of the voter approved urban limit lines.

TABLE III.4  
MASTER PLANS AND CIPS

	WATER MASTER PLAN	DATE	CIP BUDGET	WASTEWATER MASTER PLAN	DATE	CIP BUDGET
Camarillo	In progress	1999	Yes	NA	NA	NA
Simi Valley	NA	NA	NA	Yes	1985	Yes
Thousand Oaks	Yes	In progress	Yes	Yes	2002	Yes
Calleguas MWD	Yes	1999	Yes	NA	NA	NA
Camarillo SD	NA	NA	NA	Yes	1999	Yes
Camrosa WD	In progress	1990	Yes	In progress	1990	Yes
Hidden Valley MWD	No	NA	NA	NA	NA	NA
Lake Sherwood CSD	Yes	1994	Yes	NA	NA	NA
Pleasant Valley CWD	No	NA	Yes	NA	NA	Yes
Triunfo SD	No	NA	Yes	No	NA	Yes
Waterworks #1	Yes	1992	NA	Yes	1992	Yes
Waterworks #8	Yes	1986	Yes	NA	NA	NA
Waterworks #17	Yes	1986	Yes	NA	NA	NA
Waterworks #19	Yes	1985	Yes	NA	NA	NA
Ventura Regional SD	No	NA	NA	NA	NA	NA

The service review questionnaire also asked for a wide range of information regarding the capacity, age, storage, peak demand and sources of water. The information was gathered to allow Ventura LAFCO to adopt the legally required determinations for service reviews while also building a database of information that could be used to analyze and update spheres of influence.

Table III.5, Water System Information, depicts data obtained from responses to the service review questionnaire regarding number of customers, capacity and the system/facilities of the retail systems. Information for the Calleguas MWD, as a wholesale agency, and for wastewater agencies and departments is described separately.

TABLE III.5  
 WATER SYSTEM INFORMATION

	TOTAL # OF CONNECTIONS	MILE OF LINES	STORAGE (IN DAYS)	ESTIMATED PEAK DEMAND (MGD)	ESTIMATED PEAK CAPACITY (MGD)	PERMITS CURRENT
Camarillo	11,473	150	2.1	14	30	Yes
Thousand Oaks	16,123	272	2.5	17.7	35	Yes
Camrosa WD	10,382	139	1	20	33	Yes
Hidden Valley MWD*	NA	NA	NA	NA	NA	NA
Lake Sherwood CSD	570	17.72	7.14	1.60	5	Yes
Pleasant Valley CWD	118	37	75 CFS	70 AFD	70AFD	Yes
Triunfo SD	4,733	41.03	2	6.2	9	Yes
Waterworks #1	9,248	121	2.39	18	19.16	Yes
Waterworks #8	22,968	400	1	Variable	40	Yes
Waterworks #17	642	14.5	2.96	2.31	3	Yes
Waterworks #19	1,025	54.62	2.46	2.95	3.19	Yes

\* The sole source of water for the 37 separate ranches in the Hidden Valley MWD comes from more than 100 private wells.

No significant areas of infrastructure deficiencies were noted and the future need for new and/or upgraded infrastructure has been addressed by the agencies through master plans and/or annual CIP budgets and plans. All water agencies have current permits and 2003 water quality reports.

A common concern among all agencies was the uncertain and diminishing supply of water. This is a problem common to all of Southern California and is being addressed on the regional, state and federal level.

A related issue specific to Ventura County is the presence of private and mutual water companies and their impact on water supply and demand. Although private water service providers, both investor-owned and mutual, are outside LAFCO's jurisdiction, they serve important roles in the provision of service. Some of the larger private and mutual water agencies are virtually indistinguishable from public agencies; they plan for present and future infrastructure needs, meet all regulatory requirements and have adequate financial resources. However, some of the small ones, like smaller public agencies, have difficulty reaching economies of scale. LAFCO's involvement with private and mutual water purveyors is limited to changes in the public governmental structure which affect private and mutual water purveyors, i.e., when a public agency acquires a private water company and must annex the area.

Currently, the California Public Utilities Commission (CPUC) regulates investor-owned water and sewer system utilities only (sole proprietorship, partnership or corporation). It also sets rates and enforces standards for safety. Mutual water utilities (corporations in which each customer owns one share of stock) or private companies owned by homeowner associations are exempt if they serve only their stockholders or members (no outside parties).



During the service review the following private or mutual water service companies were identified as providing service in the Calleguas Creek watershed service review area:

- California Water Service Company (Thousand Oaks)
- California-American Water Company (Thousand Oaks)
- Southern California Water Company (Simi Valley)
- Pleasant Valley Mutual Water Company
- Oak Park Water Service Company (the potable water agency for the Triunfo SD)
- Brandeis Mutual Water Company (Simi Valley)

It is sometimes difficult for local agencies and customers to obtain rate, capacity and other information about private/mutual water purveyors. Planning for Ventura County's future infrastructure needs and deficiencies must include appropriate information from all water agencies. Since Ventura County and the wholesale water agencies work closely with these private concerns, information about private water purveyors could be gathered from the CPUC, Department of Health Services, Ventura County and the Calleguas MWD. It is suggested that the Ventura LAFCO database be expanded to include information regarding private and mutual water companies in order to more accurately assess present and probable service demand and supply.

**a) Wholesale Water**

The Calleguas MWD is the wholesale agency for the service review area. It imports, stores, treats and distributes potable water. The District also distributes reclaimed water from other agencies. The District's entire drinking water supply, provided by the California State Water Project, is treated and conveyed through 130 miles of pipeline to local water agencies for delivery. Exhibit III.2, Calleguas MWD Water Sales, shows the volume sales of Calleguas through June of 2003 and Exhibit III.3, Calleguas MWD Facilities, the facilities and capacity of the agency. The Calleguas MWD has prepared master plans and numerous studies addressing the issue of infrastructure needs and deficiencies for wholesale water in the service review area.

Exhibit III.2  
2003 CALLEGUAS MWD WATER SALES

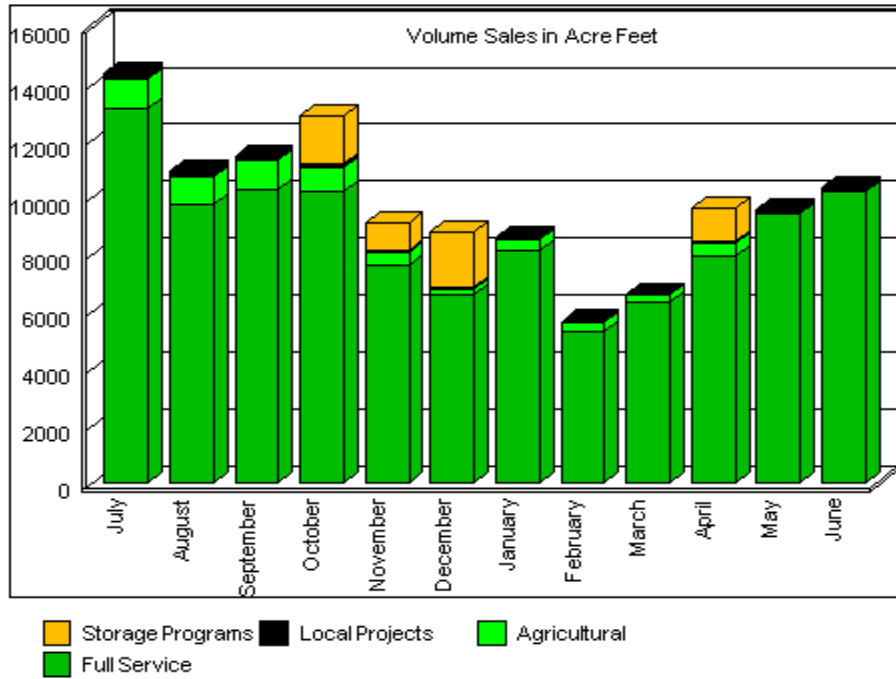


Exhibit III.3  
CALLEGUAS MWD FACILITIES

**Ventura LAFCO Water and Wastewater Service Review**  
Calleguas Municipal Water District  
Summary of Facilities and Capacities

Pipelines	Miles	Regional Capacity	Pipeline Type	Year Built
Simi Valley (Calleguas Conduit 1-5) Incl. Bell Canyon	28.4	90 CFS	PCCP, WSP, CCP	1964-83
Moorpark Incl. Somis, Las Posas Valley	31.1	70 CFS	CCP, WSP, PCCP	1966-77
Camarillo (OSR Feeder 1-7) Incl. Santa Rosa Valley	30.4	50 CFS	WSP, CCP	1965-94
Thousand Oaks Incl. Lake Sherwood, N. Ranch	46.4	95 DCFS	CCP, WSP, PCCP	1964-97
Oak Park Incl. Ahmanson	8.9	28 CFS	CCP, WSP	1966-69
Oxnard Incl. Port Hueneme	0	50 CFS		

II. Reservoirs	A.F.	Location	Year Built
Chesebro	4.0	Oak Park	1968
Conejo	5.0	Thousand Oaks	2001
Clearwell A	4.0	Thousand Oaks	1995
Clearwell B	4.0	Thousand Oaks	1995
Fairview	2.0	Moorpark	1974
Grimes Cyn	5.0	Moorpark	2003
Lake Sherwood	3.2	Thousand Oaks	1989
Lindero	4.0	Thousand Oaks	1993
Newbury Park	3.7	Thousand Oaks	2002
Oak Park	1.8	Oak Park	1998
Springville A	9.0	Camarillo	1975
Springville B	9.0	Camarillo	1990
Thousand Oaks	7.0	Thousand Oaks	1963
Westlake	7.0	Thousand Oaks	1968
<b>Total Capacity</b>	<b>68.7</b>		

III. Surface Storage	A.F.	Location	Year Built
Lake Bard	10,000	Thousand Oaks	1965

IV. Aquifer Storage and Recovery  
Las Posas Wellfield  
Construction in progress

V. Water Treatment			
Lake Bard Water Filtration Plant	50 MGD	Thousand Oaks	1995
Expansion in progress.			

## b) Wastewater Agencies

Wastewater agencies and departments were asked a similar series of questions about the capacity of their facilities. Responses and additional information taken from the State Water Resources Control Board "Wastewater User Charge Survey Report FY 2001-02" are summarized in the Table III.6, Wastewater Agency Information.

TABLE III.6  
WASTEWATER AGENCY INFORMATION

	TOTAL # OF CONNECTIONS	RATED CAPACITY (MGD)	ADWF* (MGD)	TREATMENT LEVEL	MILES OF LINES	PERMIT VIOLATIONS
Simi Valley	33,712	12.5	9	Tertiary	500	No
Thousand Oaks	36,435	12	10.9	Tertiary	532	Infrequent
Camarillo SD	12,489	6.75	3.75	Secondary	150	No
Camrosa WD	7,364	1.5	1.25	Tertiary	40	No
Triunfo SD	12,250	4.7	2.85	Tertiary	255	None Reported
Waterworks #1	8,301	3	2.2	Advanced Secondary	91	No
<b>Total</b>	<b>110,551</b>	<b>35.75</b>	<b>29.95</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>

\*Average Dry Weather Flow

All of the wastewater agencies except the Triunfo SD have master plans and use their annual CIP program to address existing and future infrastructure needs and deficiencies. The Triunfo SD noted that while it does not have an individual master plan, it is included in the master plan prepared by the Las Virgenes MWD, with which it co-owns the Tapia Water Reclamation Facility and Rancho Las Virgenes Composting Facility. The figures for the Triunfo SD represent its share of those facilities.

## III.5 FINANCING CONSTRAINTS AND OPPORTUNITIES

A series of questions was included in the service review questionnaire as a means of evaluating financial constraints and opportunities in relation to existing and projected service needs. Information collected addressed total revenues and expenditures, bond ratings, reserve levels and the presence of audits.

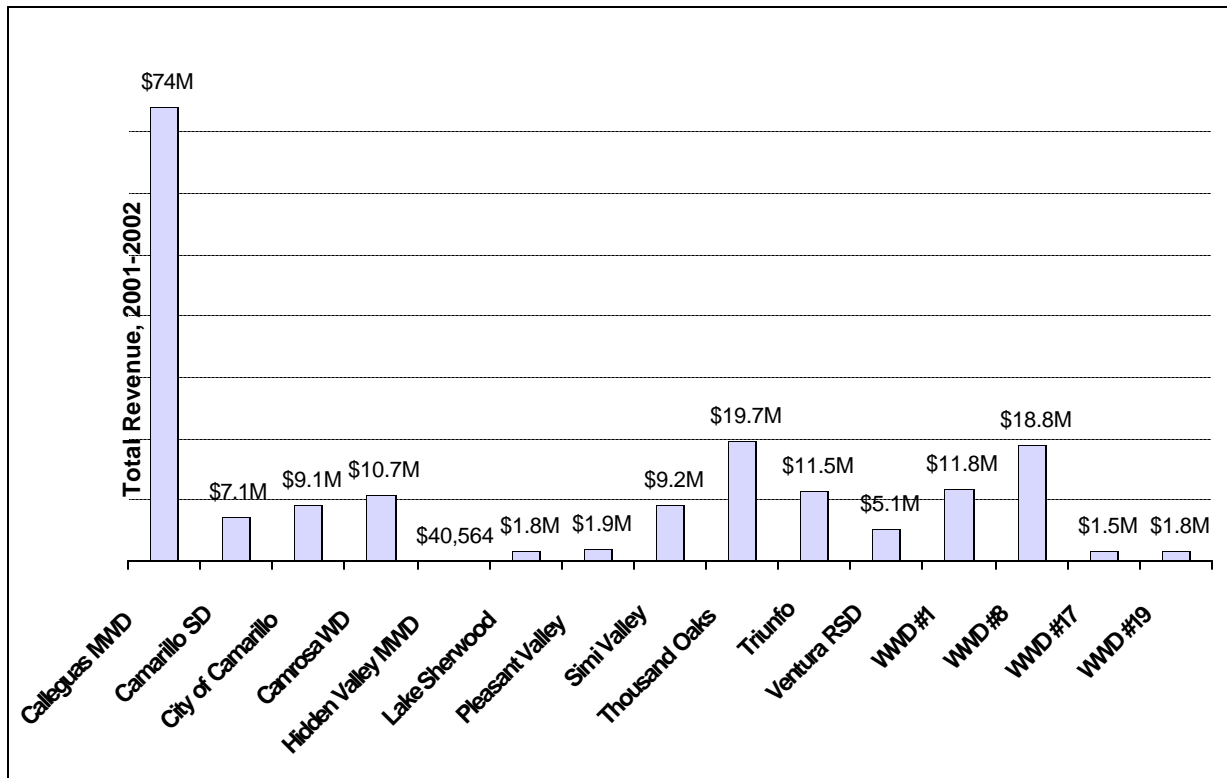
Agencies were also asked to identify any financing constraints and opportunities that affect the service provided and the infrastructure needs. Beyond existing legislative, political and governmental regulations, few agencies identified any additional financing constraints except for the cost of infrastructure and of insurance. Agencies noted that their governing board looked at rates annually to ensure a balance between rates and capital needs. Maintaining reasonable rates for customers was cited as a self-imposed financing constraint.

The service review questionnaire asked agencies to provide total revenues, revenue sources, CIP budget and reserves for the previous three fiscal years. That information is summarized for each agency in Appendix A.

No significant issues were noted for any of the agencies in relation to financing opportunities and constraints. Exhibit III.4, Agency Revenue Comparison, and Exhibit III.5, Aggregate Sources of Agency Revenue, compare total revenues for all agencies and aggregate sources of revenues. Data from FY 2001-2002 was used to compare actual numbers.

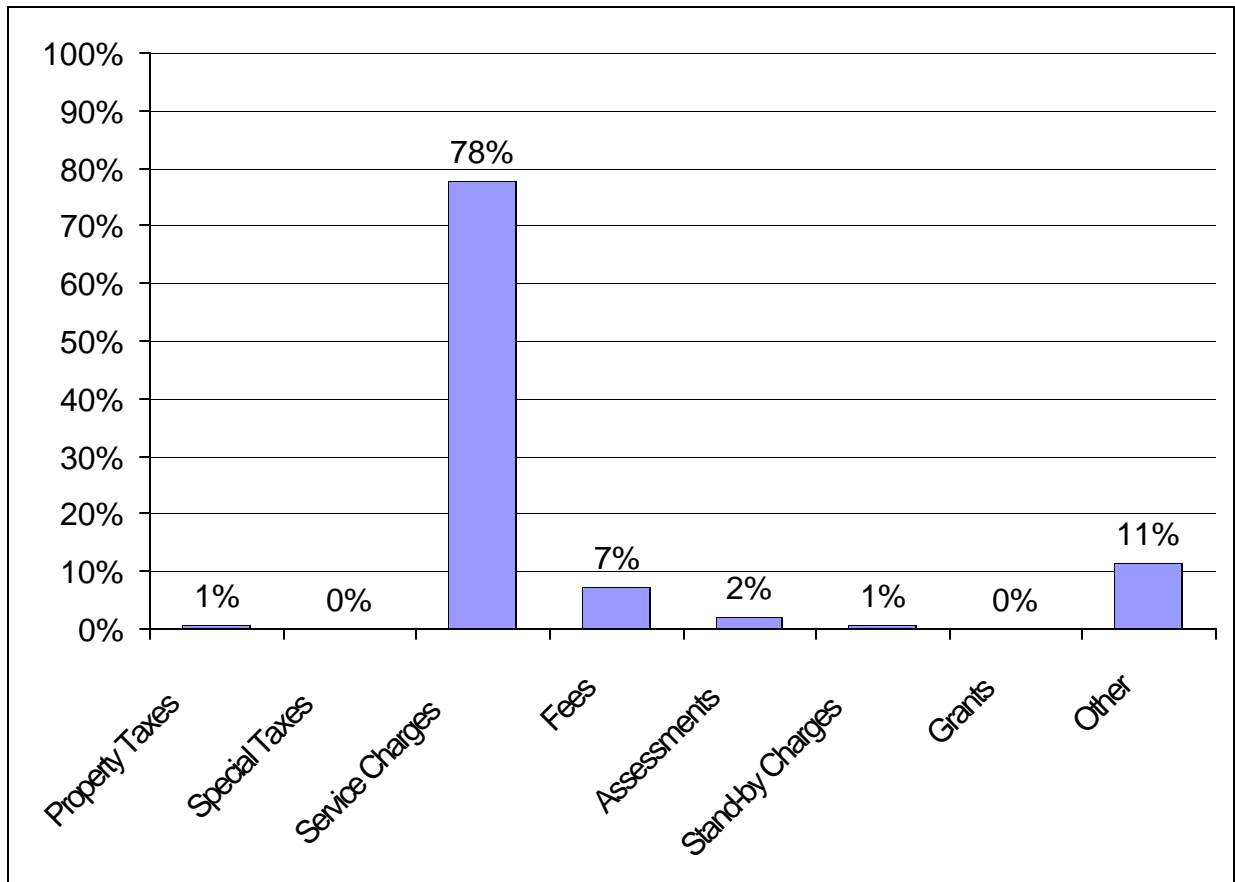
Generally revenues for all agencies are proportional to their size and service area. The revenue for the Calleguas MWD is higher than other agencies due to the high volume of its imported, wholesale water sales.

Exhibit III.4  
 2001-2002 AGENCY REVENUE COMPARISON



As enterprise activities, the primary revenue source for all water and wastewater agencies comes from service charges and fees directly related to the provision of services. Other income generally comes from interest from various funds. Exhibit III.5, 2001-2002 Aggregate Sources of Agency revenues, shows that water and wastewater agencies, as enterprise funds, derive most of their revenue from fees and charges.

Exhibit III.5  
2001-2002 AGGREGATE SOURCES OF AGENCY REVENUES



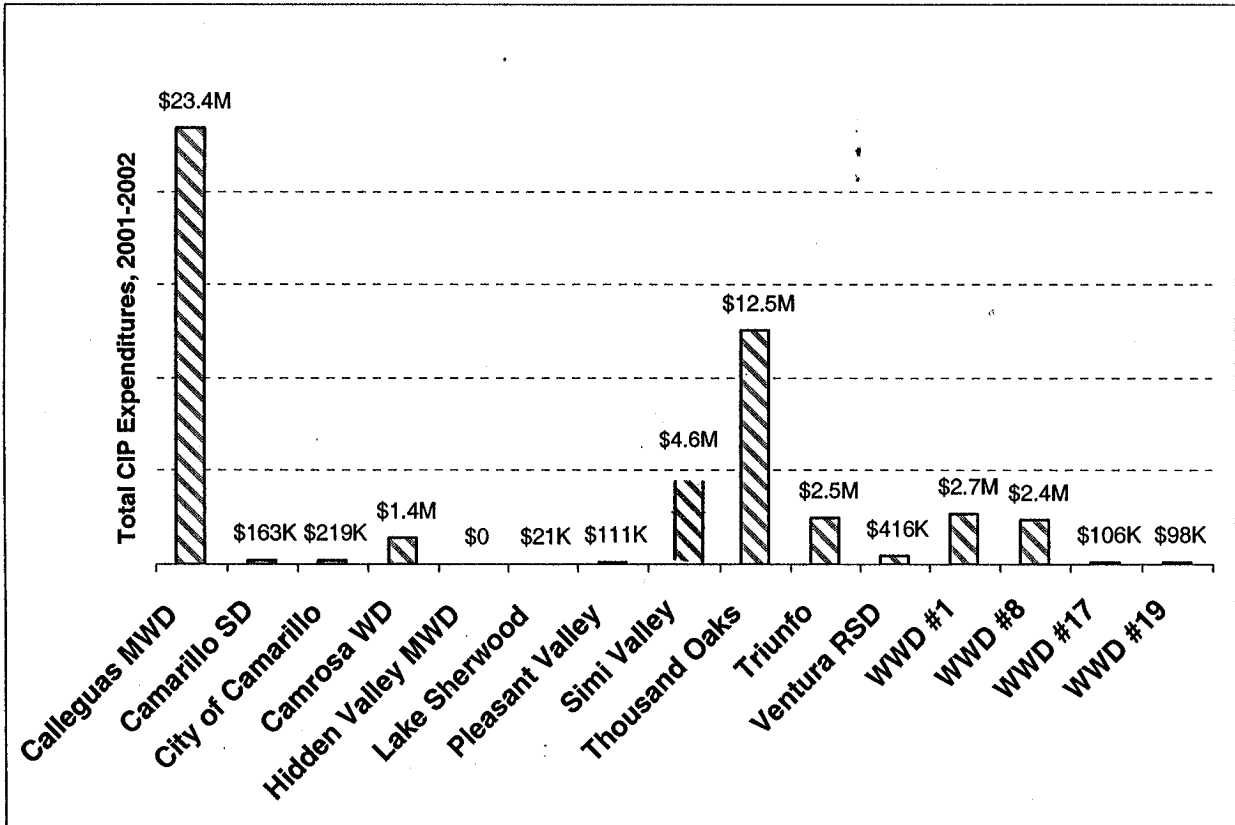
The amount of property tax revenue each agency received during FY 2001-2002 is shown in Table III.7, 2001-2002 Property Tax Revenue. Property tax revenue for cities was not reported.

TABLE III.7  
2001-2002 PROPERTY TAX REVENUE

	PROPERTY TAX REVENUE
Camarillo	NA
Simi Valley	NA
Thousand Oaks	NA
Calleguas MWD	\$3,750,800
Camarillo SD	\$689,050
Camrosa WD	\$634,950
Hidden Valley MWD	\$4,276
Lake Sherwood CSD	None
Pleasant Valley CWD	\$107,500
Triunfo SD	None
Waterworks #1	\$30,341
Waterworks #8	None
Waterworks #17	None
Waterworks #19	None
Ventura Regional SD	None

A comparison of the capital improvement financial requirements for the Fiscal Year 2001-2002 is shown in Exhibit III.6, 2001-2002 Agency CIP Comparisons. CIP costs were generally consistent across agencies except for the Calleguas MWD and the City of Thousand Oaks. The Calleguas MWD is currently upgrading facilities and constructing various major infrastructure projects such as Las Posas well field and additional storage facilities. The City of Thousand Oaks is in the process of constructing multi-year upgrades and improvements to its water and wastewater facilities.

Exhibit III.6  
2001-2002 AGENCY CIP COMPARISON



Data about agency reserve levels was collected as part of the service review. The issue of reserve levels was raised as a general statewide concern in the 2000 Little Hoover Commission report on special districts. That report concluded that some agency reserves appear unreasonably large, are not integrated into infrastructure planning and are obscure. Data collected for this service review did not find that the agencies in the Calleguas Creek watershed service review area showed evidence of the concerns noted by the Little Hoover Commission for agencies in other parts of California.

Ventura LAFCO asked agencies to report reserves in the categories of operating, capital, rate stabilization, restricted and other for the previous three fiscal years. Exhibit III.7, 2001-2002 Agency Reserve Comparison compares aggregate reserve amounts.

Setting specific levels of reserves for the diversity of agencies addressed in this service review report is impracticable. The different services, service areas, customer bases, condition of infrastructure, capital improvement programs and other issues require reserve levels specific to each agency. Agencies with large reserves typically have major, long-term capital improvement projects. For example, the City of Thousand Oaks and the Calleguas MWD both have, in relation to other agencies, a high level of reserves. However, both agencies have major, multi-year capital improvement projects in progress to meet increased regulatory requirements regarding water quality and to increase the use of reclaimed water.

In addition, the City of Thousand Oaks also has a state loan to fund infrastructure improvements. The Calleguas MWD noted that insurance for its facilities, which include a dam and a reservoir, is prohibitively expensive. Consequently, it maintains sizable reserves, in part, as a form of self-insurance.

The Triunfo SD noted that it inadvertently failed to report investments restricted as debt service reserve on the service review questionnaire. It added that as of 6/30/02,

*“...these restricted debt service reserves were just under \$2.1 million. Also, while TSD does not have funds specifically set aside as operations or rate stabilization reserves, it maintains significant working capital (averaging about \$6 million) for cash flow purposes.”*

All reserve levels reported by the agencies were clearly segregated into the uses for the reserves—operating and rate stabilizations, restricted debt reserves and capital reserves funds.



Exhibit III.7  
2001-2002 AGENCY RESERVES COMPARISON

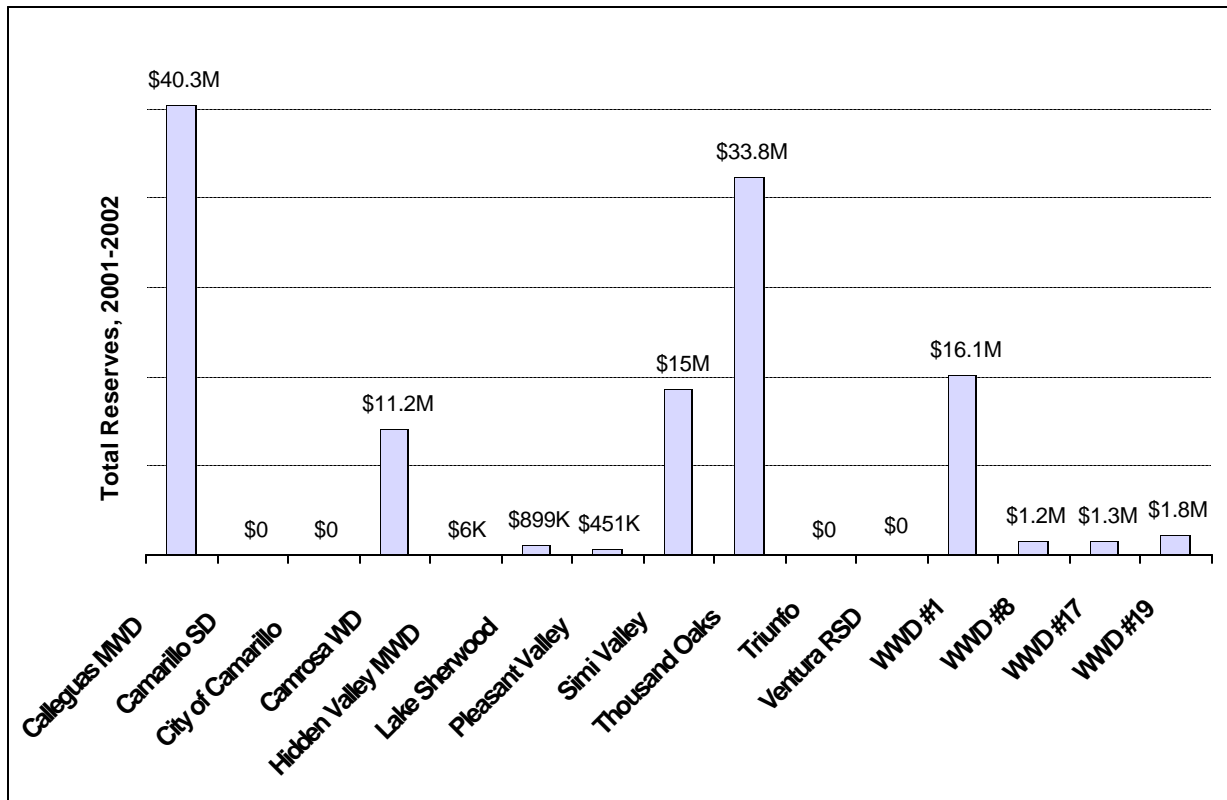
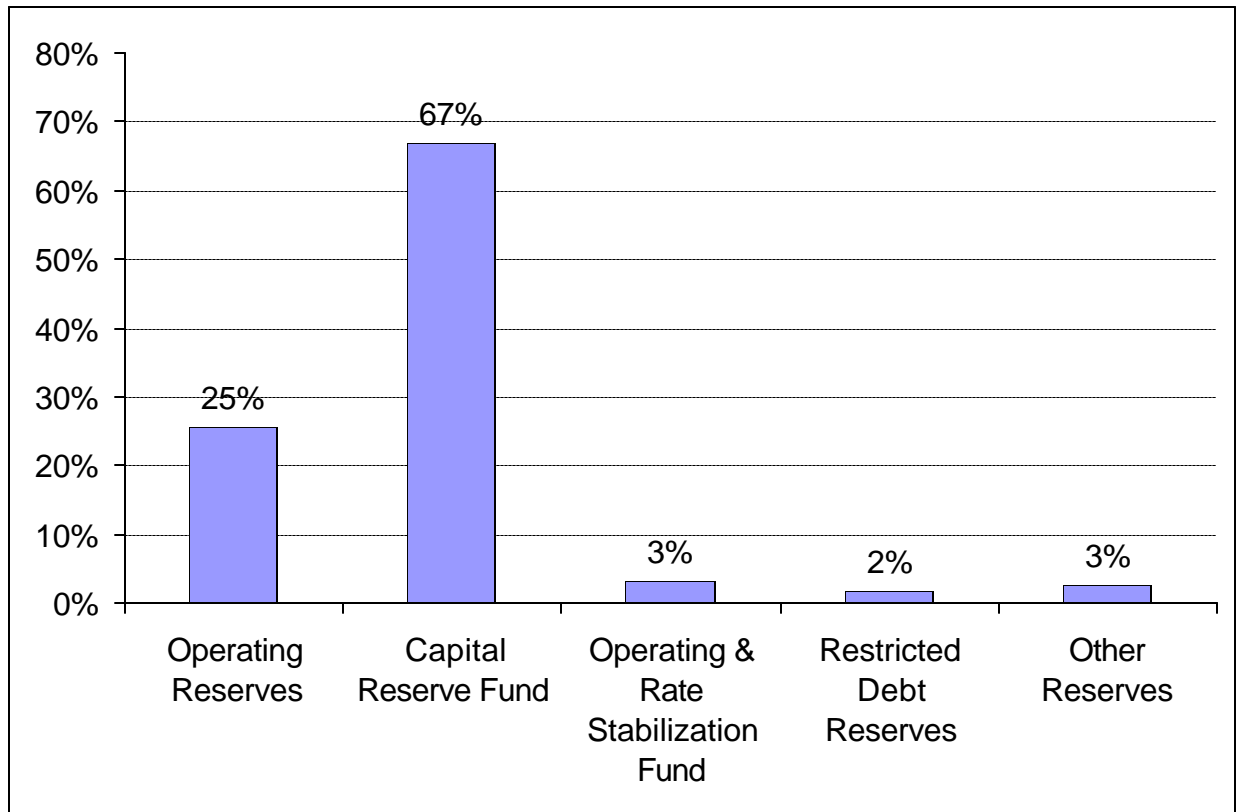


Exhibit III.8, Aggregate Reserves by Category, supports the link between capital improvement projects and reserve levels. Almost 70% of the reserves were earmarked for capital reserve funds. High capital reserve levels indicate an agency's need to maintain adequate reserves for planned infrastructure improvements/upgrades, meet expected demand and to comply with stricter regulatory requirements.

In the service review questionnaire, agencies were asked to report operating reserves and operating/rate stabilization reserves separately. Operating reserves were defined as unallocated general reserves that are set-aside for budgetary shortfalls or for purposes not specifically designated. Operating and rate stabilization funds were defined funds used to temper short-term fluctuations in delivery costs and to maintain constant and predictable rates to customers. Due to an error in the service review questionnaire, these definitions were not clear and most agencies noted in their responses that the two categories were typically considered the same. Therefore in Exhibit III.8, Aggregate Reserves by Category, the two categories of reserves, Operating and Operating/Rate Stabilization, were combined.

Exhibit III.8  
AGGREGATE RESERVES BY CATEGORY



The combined reserve categories of Operating/Operating and Rate Stabilization represent approximately 28% of total reserves. As mentioned previously, there are no generally accepted levels for operating reserves. However, the Little Hoover Commission report noted that the International City Managers Association recommends, as one criteria of solvency, that a city government have three months of operating expenses in reserves. Using that criterion, Table II.8, Estimated Three Month Reserves, shows the estimated monthly and three month total of operating expenses for each agency, the combined amount of Operating/Operating and Rate Stabilization reserves and the number of months of operating reserves reported by the agencies. In general, special districts have more than three months operating reserves due to fluctuations in costs and the absence of other reserves often held by municipalities.

TABLE III.8  
ESTIMATED 3-MONTH RESERVES

	ESTIMATED MONTHLY OPERATING EXPENSES	ESTIMATED THREE MONTH OPERATING EXPENSES	TOTAL OPERATING RESERVES	NUMBER OF MONTHS OF OPERATING RESERVES
Camarillo	\$674,175	\$2,022,525	\$4,033,642	6
Simi Valley	\$775,733	\$2,327,200	\$2,462,755	3
Thousand Oaks	\$1,658,638	\$4,975,916	\$2,513,100	1.5
Calleguas MWD	\$5,656,237	\$16,968,713	\$40,304,342	7
Camarillo SD	\$556,257	\$1,668,773	\$3,371,798	6
Camrosa WD	\$842,626	\$2,527,878	None Noted	NA
Hidden Valley MWD	\$2,827	\$8,483	\$6,631	2
Lake Sherwood CSD	\$128,159	\$384,477	\$200,000	1.5
Pleasant Valley CWD	\$179,750	\$539,250	\$477,270	2.6
Triunfo SD	\$730,272	\$2,190,816	None Noted	NA
Waterworks #1	\$1,161,568	\$3,484,705	\$5,677,500	4.8
Waterworks #8	\$1,623,283	\$4,869,850	\$541,000	0.3
Waterworks #17	\$134,804	\$404,412	\$501,300	3.7
Waterworks #19	\$124,890	\$374,669	\$884,679	7
Ventura Regional SD	\$499,849	\$1,499,549	None Noted	NA

In comments received on the draft Calleguas Creek service review report, the Triunfo SD noted that it maintains approximately \$6,000,000 as “working capital” for operational/rate stabilization reserves. It also noted that since it collects sewer service charges on the tax rolls, it maintains at least 6 months of operating capital.

### III.6 COST AVOIDANCE OPPORTUNITIES

In evaluating cost avoidance opportunities, Ventura LAFCO examined current practices used by the agencies to reduce or avoid costs including the use of outside vendors and contractors. Overlapping or inefficient service boundaries were also examined as a means that Ventura LAFCO can use to encourage efficiently provided water and wastewater services and avoid costs. As part of the service review process, all water and wastewater agencies were given LAFCO generated maps of their jurisdictional and sphere of influence boundaries. Agencies were asked to note on the maps:

- Areas of duplication of planned or existing facilities with another agency
- Areas better served by another agency
- Areas better served by the responding agency
- Areas outside the agency’s boundaries which currently receive service
- Areas difficult to serve or with illogical boundaries

Ventura LAFCO and the consulting team then mapped the changes noted by the agencies and labeled them as “special study areas”. In addition, areas where the existing sphere of influence or jurisdictional boundary varied from any voter approved urban limit/growth line were also

mapped and labeled as special study areas. During interviews, the staff of some agencies noted areas with service issues. These areas were also mapped. Finally, existing island areas in Ventura County, as noted in an annexation policy approved by the Ventura Commission in April of 2003, were mapped as special study areas. The policy requires the annexation of the following islands as a condition of approval for proposals involving a change of organization or reorganization of 40 acres or more.

Camarillo

Approximately 35-acre island north of Las Posas Road and Lantana Street

Simi Valley/Waterworks District #8

Approximately 13-acre island near Vista Lago Drive

Approximately 49.49 acres in two separate unincorporated islands near Avenida Simi and Anderson Drive

Approximately 54.51-acre island adjacent to Ditch Road

39.8-acre island between Faxton Court and Felix Avenue.

Thousand Oaks

5 separate islands totaling 39.8-acres near Lynn Road and Kelly Lane.

The service provision issues of the special study areas were not studied in depth as part of this report. The purpose of the mapping was to develop a GIS-based system that Ventura LAFCO could use for future sphere of influence studies or other studies. It can also be used as a means of ranking subsequent sphere studies. For example, several of the agencies included within the Calleguas Creek watershed service review area did not note any service issues with their boundaries or spheres of influence and subsequent interviews and analysis confirmed the information. These agencies are expected to have few or no issues with updating their current sphere of influence. Of the fifteen agencies included within this service review report, nine are considered to have either no issues with their SOI update or minor issues requiring little additional research and analysis.

Table III.9, Special Study Areas, lists the agencies included within the Calleguas Creek watershed service review area with special study areas and SOI issues. Maps for those agencies with issues or special study areas are included in the body of this report. Revised maps for all agencies with suggested study areas are part of the updated Ventura LAFCO GIS system.

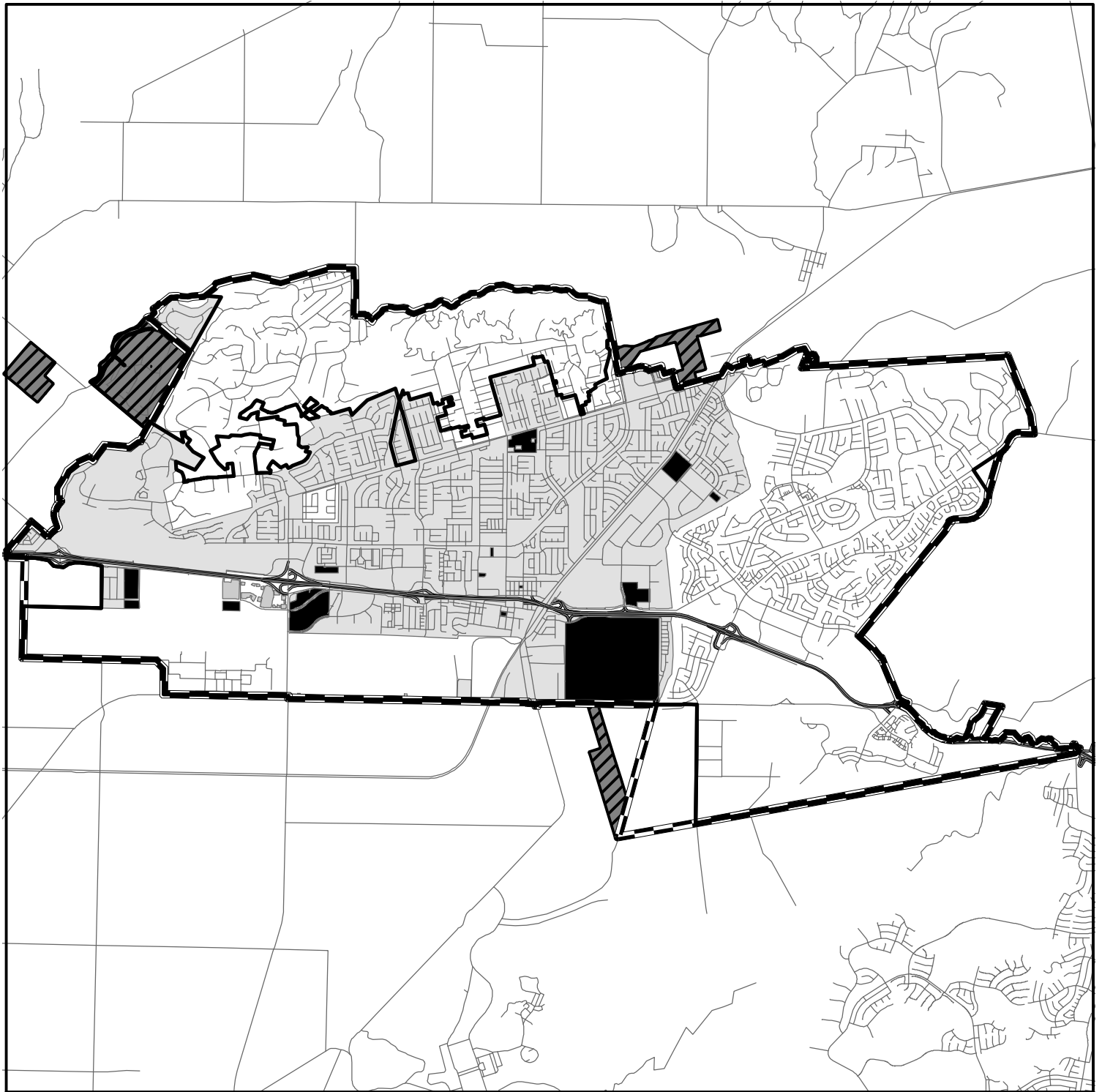
Three agencies, the City of Simi Valley, the Triunfo SD and Waterworks District #8, will require some additional analysis of areas that are outside the agency boundaries or SOI, that represent islands or that have discrepancies between the agency SOI and existing urban limit lines. The sphere of influence for cities should be consistent with voter-approved urban limit lines since the municipality would typically not extend services beyond the voter-approved growth boundary. The issue of the special districts that overlap agencies with voter approved growth limit boundaries should be also be considered during the SOI process.

Only three agencies are considered to have more complex boundary issues, which may require more extensive research or analysis. The City of Camarillo and the Camarillo SD have discrepancies between the service areas of both agencies, the CURB limits and areas receiving or requiring service. While not complex, the analysis must deal with these discrepancies. The Calleguas MWD SOI and service area will also require extensive analysis primarily due to the large service area and the possibility of reorganizing the agency with smaller agencies within its boundaries.









TABLE III.9  
SPECIAL STUDY AREAS

	SPECIAL STUDIES AREAS	SUMMARY OF ISSUE	ESTIMATED LEVEL OF ANALYSIS REQUIRED
Camarillo	Yes	1) Discrepancies between SOI and SOAR 2) Areas outside agency getting service 3) Areas within agency on septic systems	High
Simi Valley	Yes	1) Island areas 2) Discrepancies between SOI and CURB 3) Future service issues in Santa Susana Knolls	Moderate
Thousand Oaks	Yes	1) Islands	Low
Calleguas MWD	Yes	1) Islands 2) SOI and relationship to other agencies' SOI 3) Pending development areas	High
Camarillo SD	Yes	1) Areas outside agency getting service 2) Pending development areas	High
Camrosa WD	Yes	1) Facilities/service outside agency	Low
Hidden Valley MWD	None noted	None noted	Low
Lake Sherwood CSD	None noted	None noted	Low
Pleasant Valley CWD	Yes	1) Areas no longer used for agricultural uses should be detached from the agency	Low
Triunfo SD	Yes	1) Discrepancies between SOI and agency boundaries	Moderate
Waterworks #1	Yes	1) Island areas	Low
Waterworks #8	Yes	1) Island areas 2) Future service to Santa Susana Knolls	Moderate
Waterworks #17	Yes	None noted	Low
Waterworks #19	None noted	None noted	Low
Ventura Regional SD	None noted	None noted	Low

Finally, it is a reasonable assumption that some wastewater and water agencies in Ventura County will or should, at some point in the future, consider a reorganization with another service provider to gain efficiencies or economies of scale. The reasons for potential reorganizations are varied and may be linked to the size of the agency, the location of its facilities, regional growth patterns or the cost of stricter regulatory requirements. Some agencies currently serve limited areas, do not directly provide services or have spheres coterminous with their agency boundaries. A coterminous SOI indicates that it is not expected that there will be a future need for the agency's services beyond the existing boundaries.



**LEGEND**

-  City of Camarillo Sphere
-  City of Camarillo
-  City of Camarillo Water District Service Area
-  Special Study Areas
-  Areas Outside Agency Boundary/Served by Agency
-  Areas Outside Agency, Sphere, and CURB/  
Served by Agency
-  Proposed or Pending Development
-  City of Camarillo CURB Boundary

## Ventura LAFCO City of Camarillo Water District

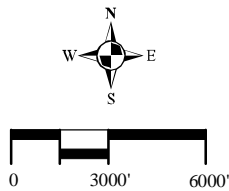


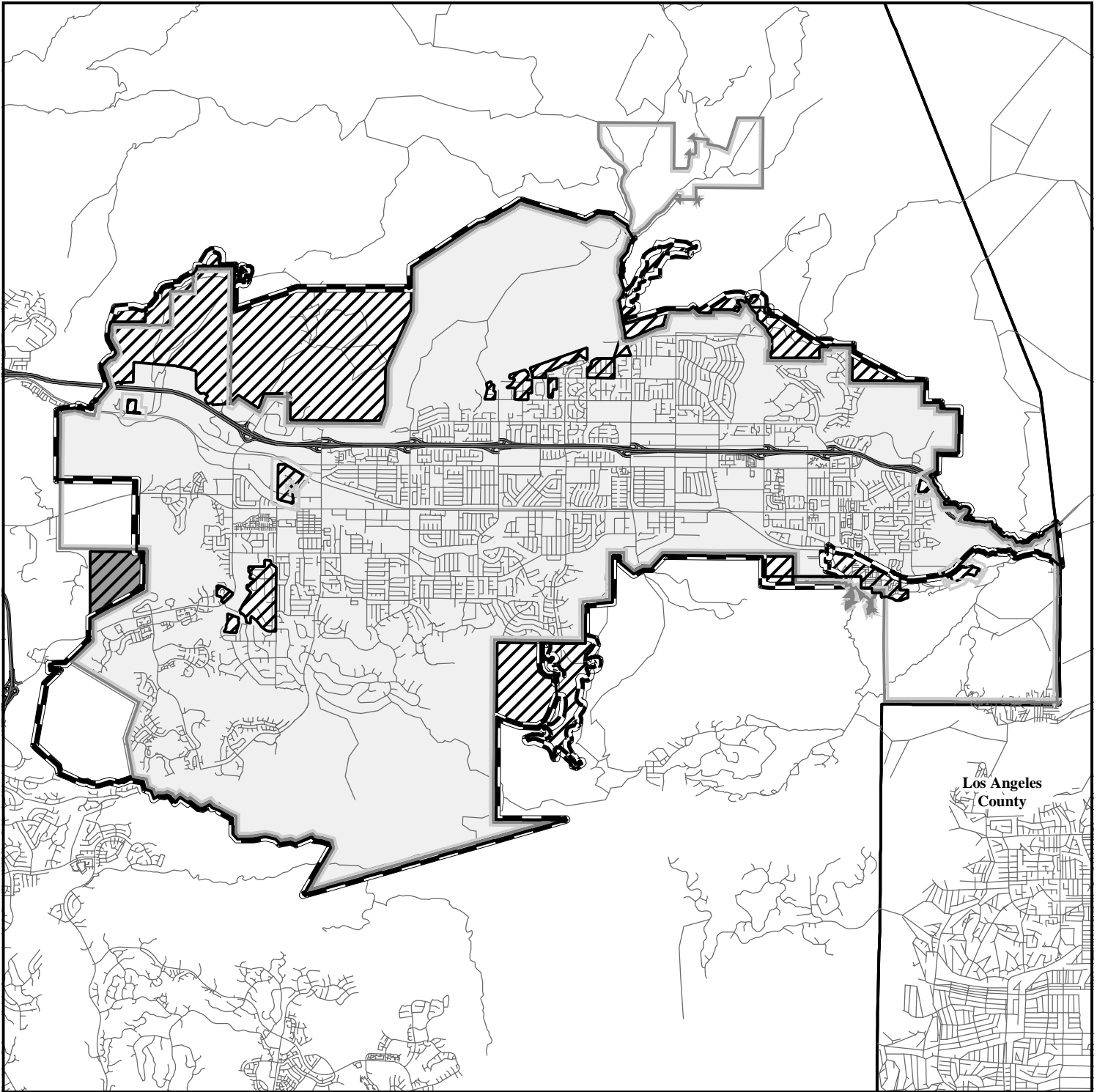
Figure III.2

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**LEGEND**

- City of Simi Valley Water District Sphere
- Waterworks District #8 Sphere
- City of Simi Valley Water District
- Areas Outside District, Sphere, and CURB Served by District
- Special Study Areas
- City of Simi Valley CURB Boundary

## Ventura LAFCO City of Simi Valley

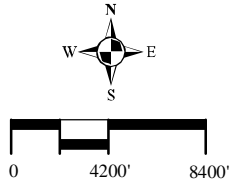


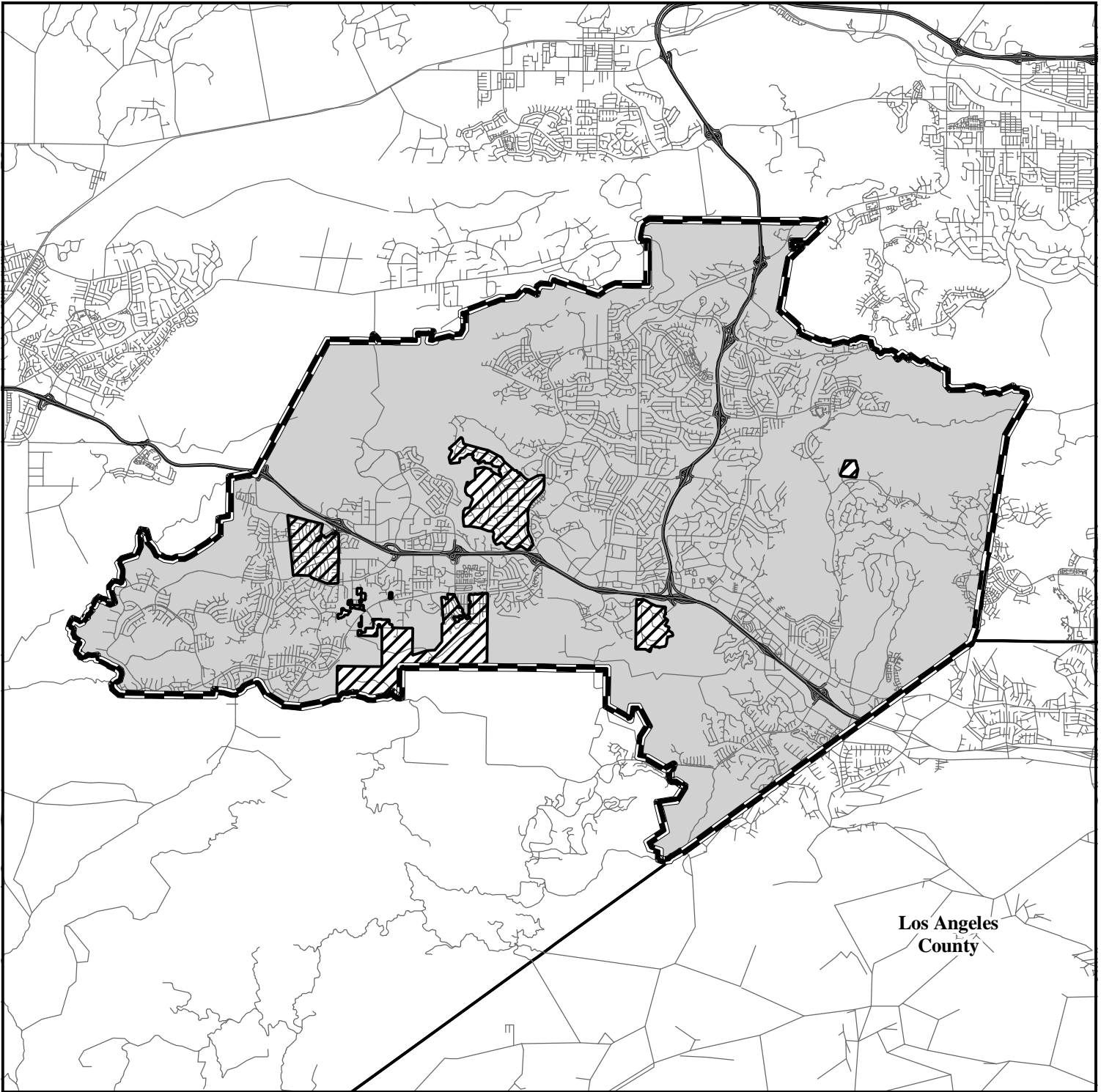
Figure III.3

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Los Angeles  
County

**LEGEND**

-  City of Thousand Oaks Sphere
-  City of Thousand Oaks
-  Special Study Areas
-  City of Thousand Oaks CURB Boundary

## Ventura LAFCO City of Thousand Oaks

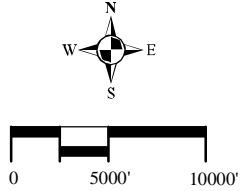


Figure III.4

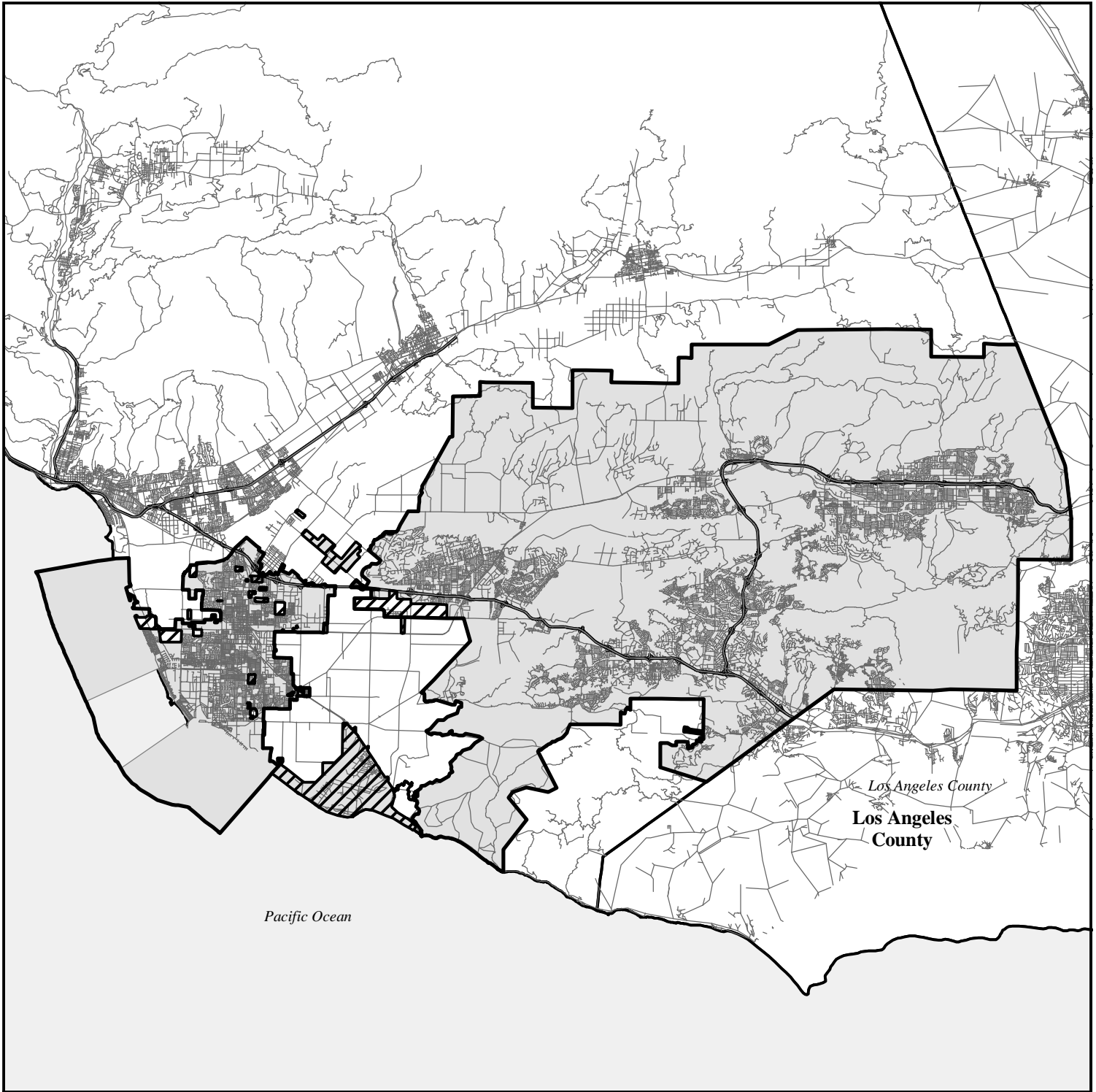
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**LEGEND**

-  Calleguas Municipal Water District Sphere
-  Calleguas Municipal Water District
-  Special Study Areas

## Ventura LAFCO Calleguas Municipal Water District

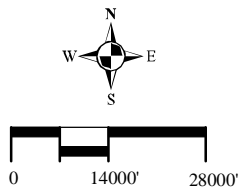


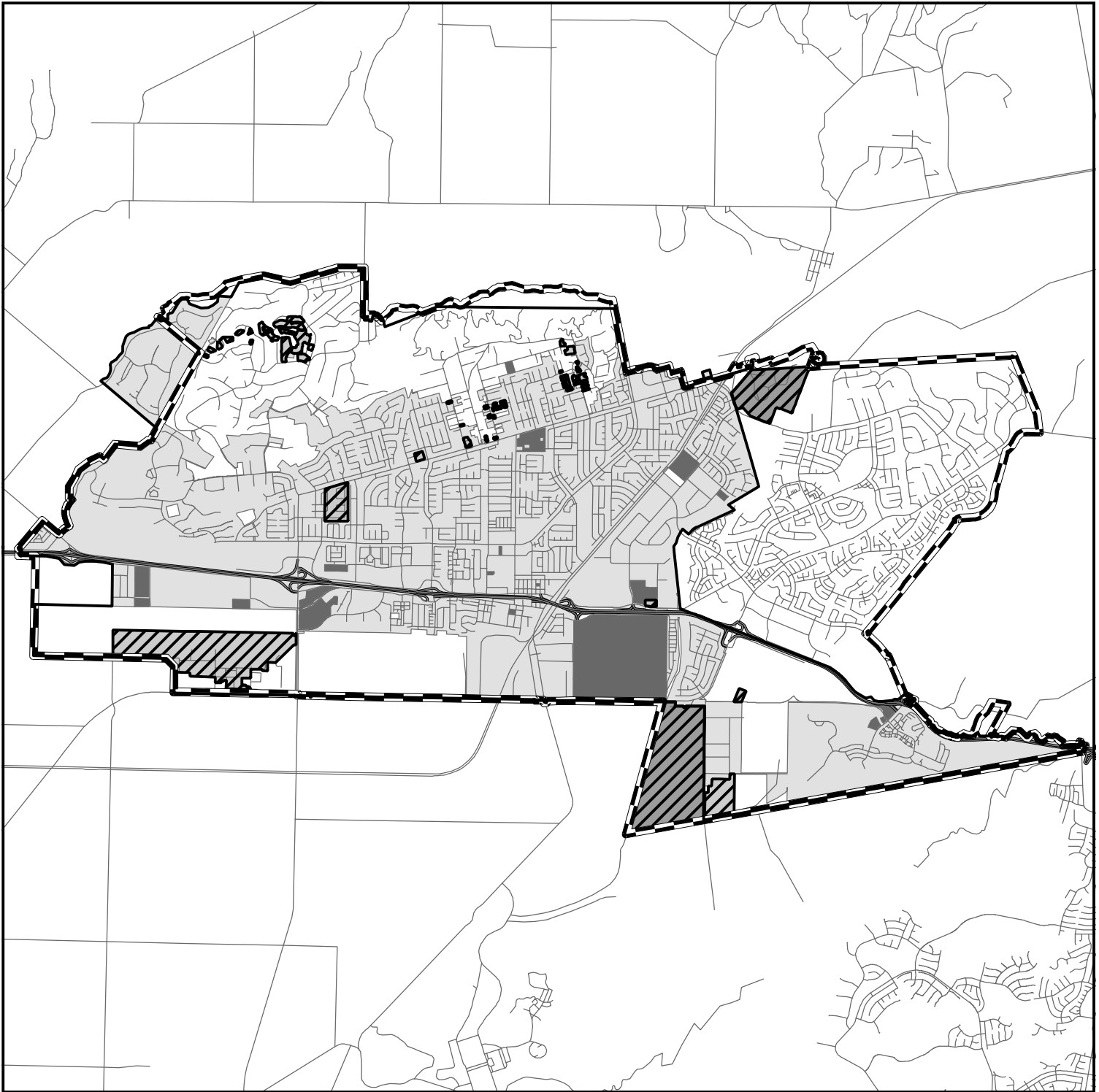
Figure III.5

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**LEGEND**

-  Camarillo Sanitation District Sphere
-  Camarillo Sanitation District
-  Special Study Areas
-  Areas Outside Agency Boundary/Served by Agency
-  Areas Outside Agency, Sphere, and CURB/Served by Agency
-  Proposed or Pending Development
-  City of Camarillo CURB Boundary

## Ventura LAFCO Camarillo Sanitation District

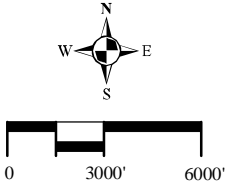


Figure III.6

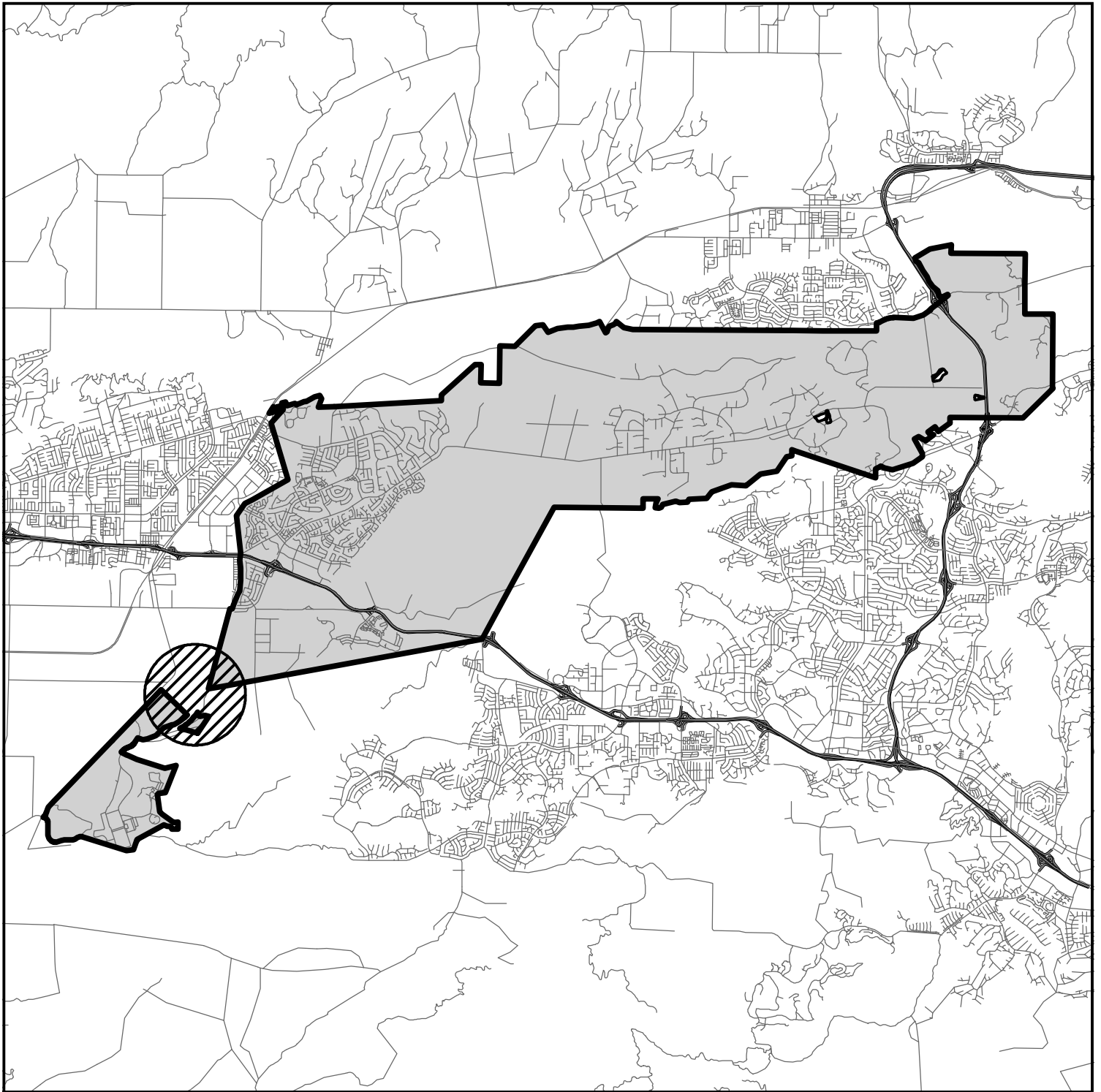
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**LEGEND**

-  Camrosa Water District Sphere
-  Camrosa Water District
-  Special Study Areas

# Ventura LAFCO Camrosa Water District

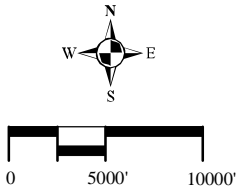


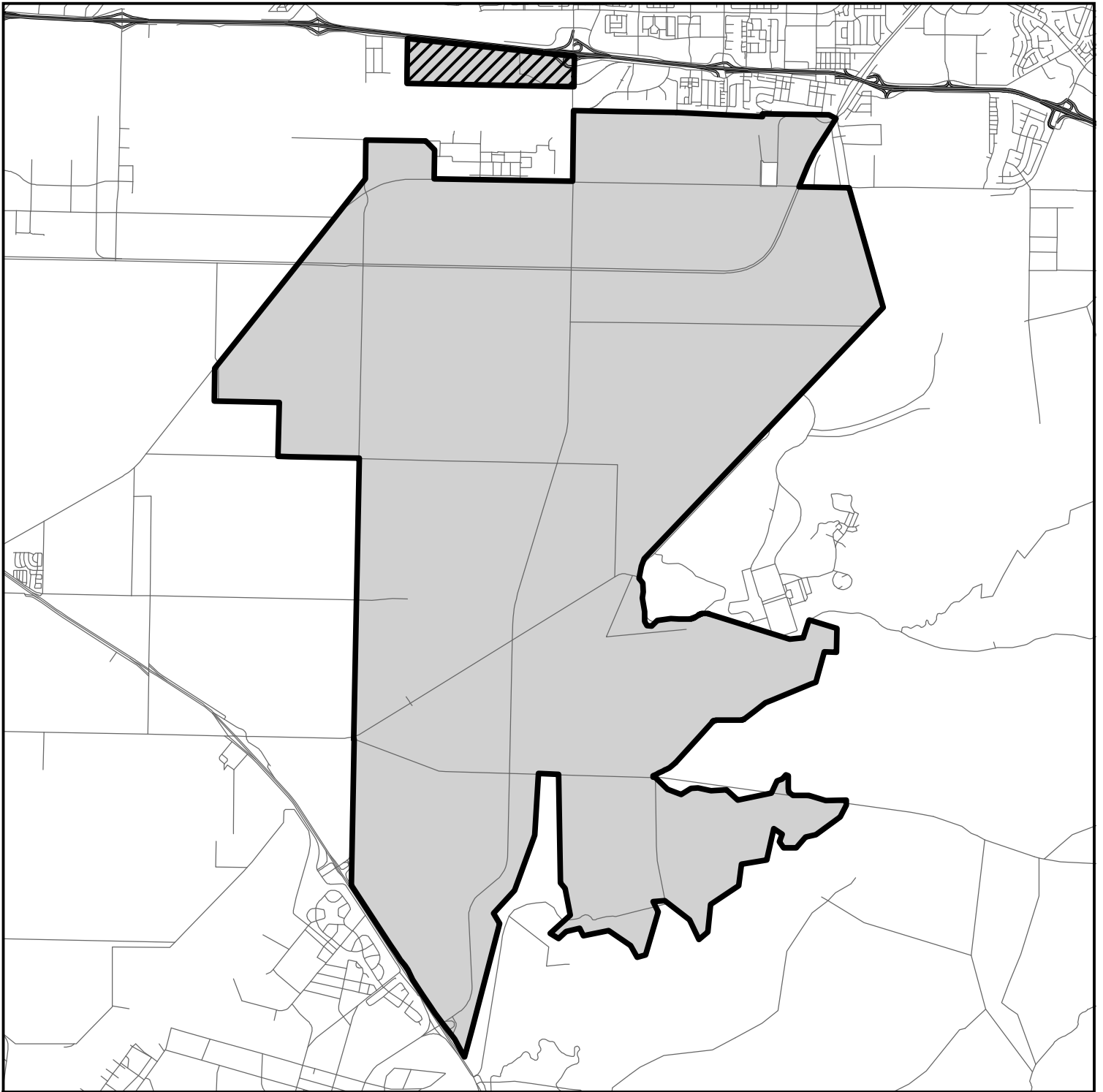
Figure III.7

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**LEGEND**

-  Pleasant Valley Water District Sphere
-  Pleasant Valley Water District
-  Special Study Areas

## Ventura LAFCO Pleasant Valley County Water District

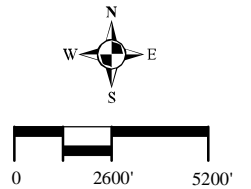


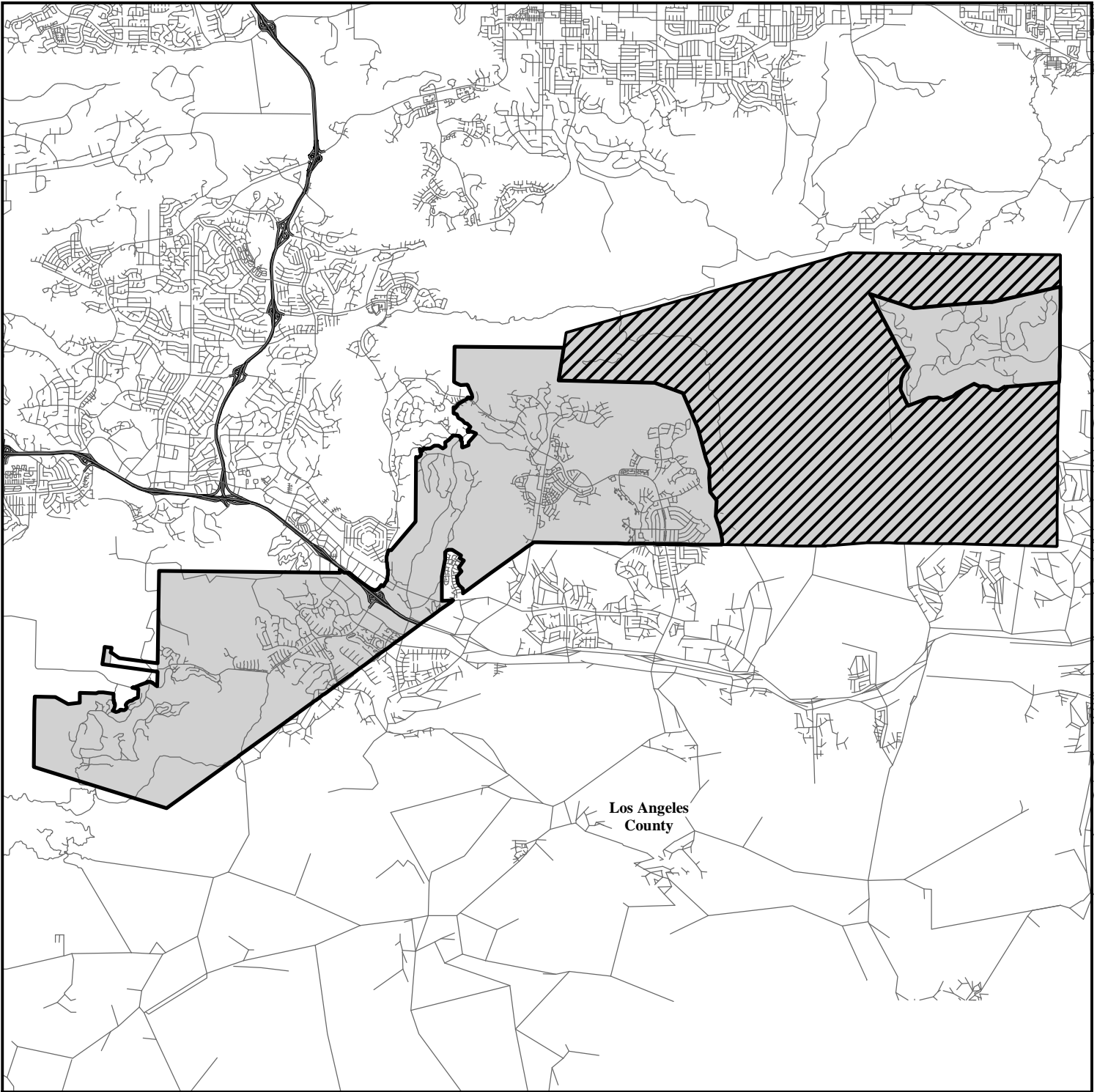
Figure III.8

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**LEGEND**

-  Triunfo Sanitation District Sphere
-  Triunfo Sanitation District
-  Special Study Areas

## Ventura LAFCO Triunfo Sanitation District

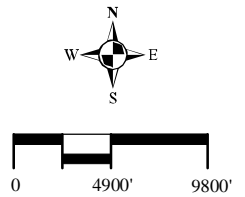


Figure III.9

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It is suggested that Ventura LAFCO consider developing a policy allowing a “zero” sphere of influence designation for these agencies. Annexations to an agency with a zero sphere might require more in-depth analysis or might be prohibited according to the policy developed. A “zero” sphere designation could ensure more efficient planning for future service. In the Calleguas Creek watershed service review area, a zero sphere designation could be considered for Waterworks District # 1, which primarily serves the City of Moorpark, Waterworks District # 8, which serves the City of Simi Valley, and the Triunfo SD.

During the mapping, another potential opportunity for cost avoidance was noted which involved duplicate GIS systems. Many of the water and wastewater agencies, including Ventura County, have GIS systems. While beyond the scope of LAFCO’s authority, Ventura County agencies should consider a closer coordination of all the GIS systems as a means of reducing costs. While it might be infeasible for one agency to maintain all GIS data, a designated agency for specific type of data might reduce costs. For example, the agencies participating in the Calleguas Creek Watershed Management Plan are currently working together to develop a more regional GIS system for watershed data. Ventura LAFCO has accurate information on the boundaries and SOIs of agencies. It is suggested that the Ventura LAFCO, in conjunction with other agencies, use its GIS system as the “official” regional source of information for the boundaries and SOIs of all Ventura County agencies.

All agencies reported well-established budget processes and procedures, which use internal cost/benefit studies to find and utilize opportunities to reduce or avoid costs. As part of the questionnaire, agencies were asked to note services that were currently provided by other agencies or private contractors, the estimated annual cost savings and excess capacity, facilities or staff that could be made available. Table III.10, Summary-Use of Contractors, illustrates each agency’s use of outside contractors; if an agency did not respond, NR is listed.

TABLE III.10  
SUMMARY – USE OF CONTRACTORS

	SERVICES PROVIDED BY PRIVATE CONTRACTORS	SERVICES PROVIDED BY OTHER AGENCIES	ESTIMATED ANNUAL COST SAVINGS	EXCESS CAPACITY, FACILITIES OR STAFF
Camarillo	Landscaping/pest control/maintenance	NR	Not Calculated	NR
Simi Valley	NR	NR	NR	NR
Thousand Oaks	Maintenance	Maintenance	Not Calculated	None
Calleguas MWD	NR	NR	NR	NR
Camarillo SD	None	Video inspection of lines/equipment painting	Not Calculated	None
Camrosa WD	Meter reading/construction/line maintenance	Source control/collection system maintenance and emergency services/backflow inspection and certification	Not Calculated	None
Hidden Valley MWD	NR	NR	NR	NR
Lake Sherwood CSD	NR	NR	NR	NR
Pleasant Valley CWD	Sampling/Lab Work	NR	NR	None
Triunfo SD	Manhole raising	Staff	NR	None
Waterworks #1	Public works	NR	None	None
Waterworks #8	NR	Back flow inspections	NR	NR
Waterworks #17	NR	NR	NR	NR
Waterworks #19	NR	NR	NR	NR
Ventura Regional SD	As requested	NR	NR	Management, finance, water and wastewater professionals

### III.7 RATE RESTRUCTURING

The service review questionnaire asked agencies to list current rates for water and wastewater service, rates changes in the previous two years, anticipated rate changes and any difference in rates charged to customers outside agency boundaries. Twelve out of the fifteen agencies reported rate increases during the previous two years with rate increases ranging from 2%-10% increase. Eight agencies anticipated rate changes in the next two years. Of those agencies that serve territory outside their boundaries, a majority of them reported charging higher rates to those customers. All agencies reported reviewing rates regularly to maintain a revenue stream adequate to cover costs and fully fund infrastructure upgrades and improvements.

The agencies were asked to list current rates in terms of acre-feet and million gallons per day (mgd), for water and wastewater respectively, in order to have a uniform basis of comparing rates from diverse agencies. Table III.11, Water Rates, includes a partial comparison of rates per acre-foot as requested by the service review questionnaire. Residents of the Hidden Valley MWD pay a \$10.00 per acre standby charge although the agency does not provide water directly. Wells in the Hidden Valley MWD are private.

The State Water Resources Control Board publishes a wastewater users survey report which was used to develop, Table III.12, Wastewater Agency Rates, and provide a comparison of the rates of the wastewater agencies in the Calleguas Creek watershed service review area.<sup>3</sup>

Table III.11  
Water Rates

AGENCY	WATER RATES AF
Camarillo	\$523
Thousand Oaks	\$693
Calleguas MWD	\$482
Camrosa WD	\$622
Hidden Valley MWD	N/A
Lake Sherwood CSD	\$618
Pleasant Valley CWD	\$75
Triunfo SD	\$747
Waterworks #1	\$563
Waterworks #8	\$563
Waterworks #17	\$719
Waterworks #19	\$541

Table III.12  
Wastewater Agency Rates

AGENCY	MONTHLY USER CHARGE	CONNECTION FEE
Camarillo SD	\$21.08	\$2,364
Camrosa WD	\$16.00	\$2,000
Simi Valley	\$20.50	\$3,375
Thousand Oaks	\$21.85	\$7,371
Triunfo SD	\$40.00	\$8,525
Waterworks #1	\$14.50	\$2,500

Using acre-feet and mgd for water and wastewater services, respectively, did not yield useful information. Most retail water purveyors use HCF as a measurement of water cost. In addition, the information in Table III.11, Water Rates, does not reflect tiered water rates. With tiered water rates, the cost of water per HCF increases as usage increases beyond a base amount. For example, both the City of Camarillo and Waterworks District #1 have tiered rates which approximately double from Tier 1 to Tier 3. This would significantly increase the cost of water per AF.

Since the agencies differ in the billing period (monthly, bimonthly or quarterly), the unit of measurement used to calculate rates, the rate structure (flat or tiered rates), connection fees,

<sup>3</sup> State Water Resources Control Board "Wastewater User Survey Report, FY 2001-2002" May 2002.



the class of user (residential, agricultural and industrial/commercial), the database is being revised to reflect the variability among the agencies while still permitting a meaningful comparison of costs for the benefit of the public, the elected officials and the agencies. A revised format for collecting data on rates from water and wastewater agencies has been submitted to Ventura LAFCO.

### III.8 OPPORTUNITIES FOR SHARED FACILITIES

As part of the service review questionnaire, agencies were asked to identify ways that they currently cooperate with other agencies to maximize opportunities for sharing facilities. Agencies were asked to list current joint activities with other agencies which are shown in Table III.13, Joint Service Agreements. Of the 15 agencies within the Calleguas Creek watershed sub-regional area, nine either did not reference any joint activities or did not respond. The remaining agencies noted joint activities, which increase opportunities for shared facilities.

TABLE III.13  
JOINT SERVICE AGREEMENTS

AGENCY	JOINT AGREEMENTS NOTED
Calleguas MWD	Calleguas Creek Watershed Plan; agreements with Triunfo SD, City of Simi Valley, Metropolitan WD; JPA for insurance.
Camarillo	MOU with California Urban Water Conservation Council Purchasing agreement for water meters and fire hydrants Insurance pool JPA
Camarillo SD	Agreement with Ventura Regional Sanitation District for equipment painting and CCTV inspection Insurance pool JPA
Camrosa WD	MOU with Ventura County for disaster operations/emergency system Service agreements with CSUCI, Camarillo Sanitary District, Ventura County and Pleasant Valley CWD Purchase agreements with Calleguas MWD and the City of Thousand Oaks Insurance pool JPA ACWA benefit package Joint funding with State Water Resources Board and Calleguas MWD Groundwater management plan-City of Thousand Oaks Calleguas Creek Watershed Management Plan
Triunfo SD	Joint venture with Las Virgenes MWD for Tapia WRF SD—Agreement with Ventura Regional Sanitation District for staff MOU with California Urban Water Conservation Council Member of California Sanitation Risk Management Agency
Waterworks #1	Service and purchasing agreements, equipment sharing and other joint service with Ventura County
Ventura Regional SD	Service agreements with Triunfo SD, Camarillo SD, Camrosa WD, CSU Channel Islands, Montalvo MID, Rio Manor Mutual Water, Saticoy SD, Thacher School, Thomas Aquinas College, United Water Conservation District, the County of Ventura, and the cities of Fillmore, Oxnard, Thousand Oaks and Ventura; Member of California Sanitation Risk Management Agency

**a) Calleguas Creek Watershed Management Plan<sup>4</sup>**

A majority of the agencies in the Calleguas Creek service review area are also participants in the Calleguas Creek Watershed Management Plan (WMP). The agencies involved in the Calleguas Creek WMP and in this service review are:

- City of Camarillo
- Calleguas Municipal Water District
- City of Simi Valley
- Camarillo Sanitary District
- City of Thousand Oaks
- Camrosa Water District
- Pleasant Valley County Water District
- United Water Conservation District
- Ventura County Waterworks District #1 (City of Moorpark)
- Ventura County Waterworks District #8
- Ventura County Waterworks District #19

The WMP, which was started in late 1996, is a public-private coalition developing an integrated strategy for the watershed and its resources. The purpose of the WMP is to produce a long-range comprehensive water resources plan for the watershed, which is cost-effective and provides benefits for all participants. The WMP, if approved, significantly increases sharing of facilities, avoid costs in the future and ensures that expenditures are closely tied to local conditions.

The WMP was started by agencies in the watershed that recognized that consensus was critical. They were being required to implement a court-ordered water quality compliance schedule and consent decree, which was developed without local participation. The consent decree, which was developed to meet water quality regulations on a constituent-by-constituent basis over a 13-year period, enforces the provisions of the Clean Water Act requiring allocation plans, or Total Maximum Daily Loads (TMDLs), to limit pollution entering surface water.

The Calleguas Creek watershed agencies continued to develop the watershed plan but the water quality regulators prepared to implement the consent decree. The Los Angeles Regional Water Quality Control Board (LARWQCB) prepared a draft TMDL in December 2001 but it was opposed by some agencies participating in the Calleguas Creek WMP for various scientific, economic and environmental reasons.

In response the LARWQCB stopped implementation of the draft TMDL levels and offered local public agencies an opportunity to propose an alternative plan that is comprehensive, responsive to local watershed priorities, grounded in sound science, and consistent with the requirements of the Clean Water Act. All parties are now trying to work together to produce a mutually satisfactory water quality plan. The Calleguas Creek WMP agencies believe that a locally developed, comprehensive watershed plan will provide the most efficient use of public funding and will avoid duplicative and unnecessary costs.

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<sup>4</sup> Draft Calleguas Creek Water Management Plan, Alexander & Associates, 2003.

### III.9 GOVERNMENT STRUCTURE OPTIONS

Functional reorganizations within agencies, amending or updating SOIs and other changes in the jurisdictional boundaries of the water and wastewater agencies were noted in Section III.6, Cost Avoidance Opportunities. This section addresses efficiencies that might be gained through other governmental structure options.

The initial step in evaluating governmental structure options was a review of recommendations from the “Ventura LAFCO 2001 Special Districts Study. These recommendations are included in this service review report as information about potential government structure options considered by Ventura LAFCO over the previous 20 years. Table III.14, 2001 Ventura LAFCO Special District’s Study, summarizes those recommendations: In the service review responses, none of the agencies reported having submitted or been included in a reorganization proposal before Ventura LAFCO within the previous two years.

TABLE III.14  
2001 VENTURA LAFCO SPECIAL DISTRICT STUDY

AGENCY	RECOMMENDATIONS
Camarillo	None noted
Simi Valley	None noted
Thousand Oaks	None noted
Calleguas MWD	Agency should consider a reorganization with smaller water districts
Camarillo SD	None noted
Camrosa WD	Agency should consider assuming responsibility for all service within City of Camarillo
Hidden Valley MWD	None noted
Lake Sherwood CSD	None noted
Pleasant Valley CWD	None noted
Triunfo SD	None noted
Waterworks #1	None noted
Waterworks #8	None noted
Waterworks #17	None noted
Waterworks #19	None noted
Ventura Regional SD	None noted

One of the purposes of the service review is to list all possible government structure options including advantages and disadvantages of potential reorganizations. For this purposes of this service review report, a reorganization is defined as two or more changes of organization (i.e., consolidation, merger, dissolution, annexation and/or detachment) which are initiated in a single proposal before LAFCO. It should be noted that the different requirements for each type of change of government structure, as contained in the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000, may present obstacles to a potential reorganization. It is suggested that the Ventura LAFCO Commission, in conjunction with the agencies involved, discuss the potential benefits that might accrue from reorganizations of the following agencies.

**1) City of Camarillo, the Camarillo Sanitary District and the Camrosa Water District**

Options include merging the Camarillo SD with the City or reorganizing the Camarillo SD, the City's water service department and the Camrosa WD to allow the Camrosa WD to provide service to the entire City. Potential advantages include simplification of service delivery, reduced costs and increased economies of scale. Disadvantages include resistance from elected officials and the public, the loss of water and wastewater service specific to the City of Camarillo and the complexities of combining separate water and wastewater systems.

During the review of the draft service review report, the agencies noted that while the adjacent service areas might appear to offer opportunities for reorganization, the Calleguas Creek, which forms the boundary between the two agencies, presents significant technical disadvantages to an interconnection of the facilities. Political opposition was also cited as a significant disadvantage.

The Camrosa WD noted that it is exploring cooperative opportunities in conjunction with the City and the Camarillo SD to improve reliability and affordability of services. Non-potable water delivery is being considered as part of an agreement that would deliver recycled, treated effluent from the Camarillo SD plant to the Camrosa WD. This would allow the City to avoid some costs associated with increased environmental regulation for disposal of effluent in Conejo Creek while also making a new source of irrigation water available.

A related service issue that is beyond the purview of LAFCO involves on-site sewage systems. The highlands area of the City of Camarillo primarily uses on-site wastewater systems but is within the SOI of the Camarillo Sanitation District. The District and the City have worked with residents to encourage them to annex into the District to provide more efficient service, protect groundwater and water quality resources and to reduce costs of annexation. Residents have typically resisted annexation unless forced to by failing on-site systems. The result has been piecemeal annexations and irregular boundaries.

In addition, the possibility of on-site systems polluting ground waters was cited as a concern in the Calleguas Creek WMP. While the rate of failures in the highlands area was not noted as significant enough to create public health issues, it is suggested that Ventura County, the Camarillo Sanitary District and City of Camarillo work together to review the Ventura County Guidelines for Orderly Development. These Guidelines, which provide direction for the level of development, lot size and conditions for public sewer connection, should be reviewed to determine if more stringent guidelines for on-site systems are warranted.

**2) City of Simi Valley and Waterworks District #8**

Water service in Simi Valley is currently provided through two suppliers of water: Southern California Water Company and Ventura County Waterworks District #8. Approximately 60% of the area is served by the Waterworks District, which is managed by the City with the City Council serving as the Board of Directors for the District. The Southern California Water Company is a private company, which provides water service to the other 40% of the area.

This potential government structure option includes the reorganization of the water and wastewater functions of the City of Simi Valley and Waterworks District #8 so that one agency provided water and wastewater services to residents. During interviews, the coordination for future service needs among the City, Waterworks #8 and the Southern California Water Company was cited as being complicated and occasionally confusing. In addition, differences in rates between the two water purveyors have sometimes created issues with residents. While Ventura LAFCO has the statutory authority to analyze the potential reorganization of the City of

Simi Valley and Waterworks District #8, no other issues were noted by either public agency during the service review.

Potential advantages include simplification of service delivery and increased economies of scale. However, the Southern California Water Company would still provide water service to a significant portion of the City. LAFCO has no authority to reorganize private or mutual water companies; however, simplification of service delivery and service areas might be increased if the City also assumed responsibility for the area served by the private water company. Disadvantages include: resistance from elected officials and the public; the complexities of combining separate water and wastewater systems; and, revision of the existing legal agreement between the City and Waterworks #8. It is unclear if cost savings would result from the reorganization. The City of Simi Valley has noted that extensive analysis would be needed to determine the potential benefits.

As stated previously, the reorganization of private water purveyors is beyond the scope of this service review and of LAFCO. However, the issues of different rates and coordination of activities between private and public service providers were cited during interviews in the Calleguas Creek service review area as well as in other portions of Ventura County. It is suggested that Ventura LAFCO work with Ventura County and other agencies to collect appropriate rate information on private and mutual water purveyors.

### **3) City of Moorpark and Waterworks District #1**

This government structure option would involve the merger of the City of Moorpark and Waterworks District # 1 to allow the City provided water and wastewater services to its residents. Potential advantages include simplification of service delivery and increased economies of scale. However, no issues were noted during the service review with the provision of water and wastewater service and it is uncertain if service delivery would be simplified. Disadvantages include resistance from elected officials and the public, the complexities of combining separate governmental agencies and future provision of service to unincorporated areas currently served by the agency. Potential cost savings are unknown. A 1988 feasibility study recommended that all wastewater and water services within Waterworks #1 be transferred to the City of Moorpark. The study should be reviewed and updated to reflect changing growth and financial conditions.<sup>5</sup>

### **4) Triunfo Sanitation District**

The Triunfo SD does not provide direct services to its customers but provides them through contracts with other agencies. Reorganization with another agency might eliminate a layer of government, reduce costs and simplify/improve service provision. Disadvantages include the complexity of replacing the Triunfo SD's existing contracts with new agreements and uncertain cost savings.

During interviews and in subsequent research the following additional potential governmental structure option was noted.

### **5) Calleguas MWD**

One potential governmental structure option involves the Calleguas MWD service area/SOI. Currently the District's SOI and service area include portions of the City of Oxnard. With minor exceptions the agency's boundaries are coterminous with its SOI. As areas annex to the City

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<sup>5</sup> "A Feasibility Study for Moorpark and the County of Ventura for Transferring Water and Wastewater Utilities from the County of Ventura to Moorpark", Arthur Young Consulting. March, 1988.

and require water service, they are required to annex to the Calleguas MWD and to the Metropolitan Water District (MWD), which allows the developing parcels to receive imported water. When territory annexes to a member agency, MWD's Administrative Code requires concurrent annexation.

The cost of requiring concurrent annexation has proven to be an obstacle to the provision of efficient services. In addition to the fee and charges of the City of Oxnard and of Ventura LAFCO, the fixed fee for annexation to Calleguas MWD and MWD are approximately \$4,500 per acre which are paid by the property owner. The annexations in the City of Oxnard have been sporadic and piecemeal as individual or small groups of property owners request annexation. The unintended result has been service boundaries which are sometimes confusing and which do not always assist regional water and wastewater planning goals and objectives.

There have been several attempts to provide a more comprehensive approach to annexation in the area. Ventura LAFCO has tried to encourage a more logical and phased annexation program and the Calleguas MWD has studied the economics of an annexation program. Developing a program of phased annexation could save time and money for both property owners and agencies.

One obstacle to annexation and the creation of more logical boundaries is the reluctance of many property owners to initiate annexation proposals. Government Code Section §57075 requires that the proceedings for annexation be terminated if more than 50% of the registered voters or landowners protest. The impact is that some property owners and agencies do not initiate annexations that could result in more logical boundaries and improve service delivery.

Another obstacle is the requirements of the California Environmental Quality Act (CEQA). Virtually all annexation proposals are subject to CEQA review and the legal and financial obstacles of preparing the required CEQA documents are formidable. However, CEQA does allow for the exemption of planning studies and it is suggested that Ventura LAFCO consider studying a phased annexation program for this area as part of the update of the Calleguas MWD SOI. The program could provide incentives for the timely and cost-efficient annexation of areas not now within Calleguas MWD service area and/or SOI.

Another issue with the Calleguas MWD is the consistency of the District's SOI and the potential service area as established by MWD. The MWD's Annexation Policy Briefing Book, published December 1995, includes the following 1931 General Policy Statement describing Metropolitan's ultimate service area as follows<sup>6</sup>:

*"Those portions of the Coastal Plain to which the aqueduct system can economically deliver water are regarded as the ultimate area that should be included within the Metropolitan Water District."*

Additionally, the Coastal Plain is described as follows:

*"That part of Los Angeles County southerly from the Santa Susana and the San Gabriel or Sierra Madre Mountains; that part of San Bernardino County south of the San Gabriel or Sierra Madre Mountains, and south and west of the San Bernardino Mountains extending easterly to the summit of San Gorgonio Pass; that part of Riverside County*

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<sup>6</sup> Personal Communication, Cy Johnson, Calleguas MWD.

*west of the San Jacinto Mountains; that part of Orange County west and north of the Santa Ana Mountains."*

Referring to the above quotations, Metropolitan's report entitled 1976 Analysis of Annexation Policy of The Metropolitan Water District of Southern California states the following:

*"Although the two quoted portions indicate an intention to consider applications from any part or all of the designated coastal areas, the limitations set up were not subsequently looked upon and absolute, but were treated as indicative of the area within which Metropolitan expected to operate. They constituted no legal prohibition against wide expansion and implied no obligation to attempt to serve the whole area included in the description. In fact, certain areas within the prescribed limits were later declared not to be acceptable, and careful study was made of proposed annexations in Ventura and Santa Barbara Counties."*

In 1931 Metropolitan's service area did not include San Diego or Ventura Counties.

No official description has been located for the ultimate service area boundary in Ventura County and various historical documents show conflicting information. A letter dated July 29, 1976 from Metropolitan's General Manager to the City of Ventura's Director of Public Works contained in the following statement:

*"In the early 1960's when the State water contracts were being negotiated, the City of Oxnard and Calleguas MWD were in the process of annexation to Metropolitan, and there was an informal understanding that MWD would serve the area south of the Santa Clara River and that the County of Ventura would serve the area north of the river".*

However, there are various MWD maps which show the Ventura County service area as that portion of Ventura County located south of a line that generally follows the crest of the Santa Susana mountains (approximately the existing northern boundary of Calleguas MWD) to a point where the westernmost foothills approach the Santa Clara River, and thence along the river to the sea. There is also a map that was attached to a May 5, 1962 letter from the General Manager to the Board of Directors addressing general annexation policy, which shows Metropolitan's service area as including the City of Ventura. Because of the undefined nature of the boundary in Ventura County, MWD's ultimate service area boundary in Ventura County is not clearly defined along the eastern county line, the Santa Clara River, and the northern boundary of the City of Ventura. It is suggested that the Calleguas MWD work with both MWD and Ventura LAFCO to clarify a SOI consistent with the MWD service area for the District.

### **III.10 EVALUATION OF MANAGEMENT EFFICIENCIES**

Reviewing management efficiencies has generally been an internal function of a public agency with limited oversight by external entities such as some state and federal regulatory agencies or a Grand Jury. The draft OPR service review guidelines suggested factors that could be used when evaluating management efficiencies, but many of them relate to internal practices which are difficult to measure and whose correction is outside the purview of LAFCO authority. Some of the factors the OPR Guidelines recommend for evaluating management efficiencies have been addressed in other sections of this report. The Ventura LAFCO questionnaire included questions about master plans, recent litigation and/or Grand Jury inquiries and number of employees as a means of evaluating management efficiencies.

The presence of master plans, as described in Section III.4, Infrastructure, can be viewed as indicative of managerial efficiency in long range planning. However it should be noted that some small agencies and agencies which are close to built-out may use other means of predicting and preparing for long-term service needs.

Frequent litigation or inclusion in a Grand Jury report can also be used as a proxy measure for managerial efficiency. If an agency is frequently involved in litigation, it can indicate that the staff and/or Board resort to the courts for resolution of issues which might be addressed through other less expensive means. Occasionally inclusion in a Grand Jury investigation might mean that complaints about the administration have been received.

Only the Triunfo SD noted recent litigation regarding the provision of service; the lawsuit was settled by mediation in 2003. One other agency, Pleasant Valley CWD, noted that it had been asked to respond to Grand Jury questions in the previous two years. The Grand Jury report was obtained and no significant, negative conclusions were noted.

Agencies were also asked to report the number and categories of employees dedicated to the provision of service. The 1999-2000 Ventura County Grand Jury report, "An Examination of Special Districts Providing Water Service to Ventura County" used the agency's administrative expense as a percentage of the operating revenue for the district. The Grand Jury's report noted that:

*"Most districts enjoy administrative overhead percentages of less than 15%....dependent districts enjoy low overhead through their sharing of management, facilities and staff. Smaller, independent districts, however, pay the largest overhead penalty."*

The service review questionnaire did not specifically request that agencies provide administrative overhead percentages although in future service reviews this measurement should be considered. If future service reviews continue to require an assessment of management efficiencies, Ventura LAFCO should consider requesting this information or developing performance measures, benchmarks or some other means to allow for a meaningful comparison of management practices and efficiencies among diverse agencies.

As another means of assessing managerial efficiencies, the following table provides the number of administrative, professional/support and operational employees and the ratio of the number of professional/support and operational employees to administrative staff. The 1999-2000 Grand Jury conclusion that dependent districts, which share staff and facilities with a larger organization, have the lowest overhead seems to be consistent with the ratios expressed in Table III.15, Employee Information.

To account for the practice of allocating a portion of the total administrative expenses by transferring enterprise funds to general fund, cities and dependent districts were asked the amount of the enterprise fund budget transferred to the general fund. The City of Simi Valley transferred approximately \$850,000 in 2000-01, \$900,000 in 2001-02 and \$1,000,000 in 2002-03. The City of Thousand Oaks transferred approximately \$200,000 in all three fiscal years. Waterworks District #8, which is governed by the City Council of Simi Valley, transferred approximately \$1,000,000 in 2000-01, \$1,100,000 in 2001-02 and \$1,200,000 in 2002-03. Prop 218 and subsequent legal opinions discourage the transfer enterprise funds to the general fund unless there is a clear nexus between the transfer and the cost of services. Most public agencies have completed these nexus studies.



TABLE III.15  
EMPLOYEE INFORMATION

	RATIO OF EXECUTIVE STAFF TO PROF. AND OPER.	WATER			WASTEWATER		
		EXECUTIVE AND MGT.	PROF. AND SUPPORT.	OPERATIONAL	EXECUTIVE AND MNGT.	PROF. AND SUPPORT.	OPERATIONAL
Camarillo*	NA	0	3	13			
Simi Valley*	1:9				6	7	47.5
Thousand Oaks*	NA	0	1 (supervisor)	12	0	5	30
Calleguas MWD	1:7	7	16	34			
Camarillo SD	1:4				3		11
Camrosa WD	1:5	3	7	9			
Hidden Valley MWD	NA			1			
Lake Sherwood CSD*	1:6 w 1:4 ww	7	18	27	6	18	7
Pleasant Valley CWD	1:4	1		4			
Triunfo SD	NA	NA	NA	NA	NA	NA	NA
Waterworks #1*	1:6 w 1:4 ww	6	18	20	6	19	7
Waterworks #8*	1:13	2	13	26			
Waterworks #17*	1:6 (w) 1:4 (ww)	6	18	20	6	18	7
Waterworks #19*	1:6 w 1:4 ww	6	18	20	6	19	7
Ventura Regional SD	1:17	4	24	43			

\*Agencies with water/wastewater responsibility and some Waterworks Districts, as dependent districts, share employees.

No significant inefficiencies in management were noted among the agencies in the Calleguas Creek watershed service review area.

### III.11 LOCAL ACCOUNTABILITY AND GOVERNANCE

No significant issues regarding local accountability and governance were noted for any of the agencies within the Calleguas Creek watershed service review area. The governing boards of the agencies appear to be locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their election process. However, only eight of the agencies provide copies of their agency's budget on their website<sup>7</sup>; it is suggested that the remaining agencies post budgets on their websites. In the case of smaller agencies who do not have websites, it is also suggested that they provide them to increase accountability to customers.

The service review questionnaire asked each agency to provide current information about the governing board, the expiration date of each member's term and whether any recently elected governing board members ran unopposed. This information was entered into the database and will be used to maintain current and accurate information. Data about compensation, review

<sup>7</sup> The eight agencies providing copies of their budgets on their website were: Camarillo SD, Camrosa WD, City of Camarillo, Lake Sherwood CSD, the City of Thousand Oaks, Waterworks District #1, #17 and #19.

sessions of the Brown Act/FPPC requirements and violations of either regulation within the previous two years was collected.

In addition, agencies were asked to indicate if the governing body was elected or appointed, whether recently elected officials ran unopposed and to provide the amount of compensation set for elected officials. Only three agencies within the Calleguas Creek watershed service review area noted appointed directors—the Pleasant Valley County Water District (CWD), the Triunfo Sanitation District (SD) and the Ventura Regional Sanitation District (SD).

The Pleasant Valley County Water District encompasses 11,000 acres but serves an estimated population of less than 2,000. It has five directors all of whom were listed as being appointed.

The board of the Ventura Regional Sanitation District has nine directors, all of whom are appointed. Eight of the board members, all city council persons, are appointed by their respective City Councils. The ninth member, which represents independent special districts, is selected by the Ventura Regional SD Board.

The board of the Triunfo SD has two elected board members and three appointed board members. Appointed board members include representatives from the Ventura County Board of Supervisors, the City of Thousand Oaks and the Ventura Regional SD. The Ventura Regional SD board is itself comprised of appointed members from the cities and independent special districts. While the Ventura Regional SD Board has, in the past, selected its special district member to serve on the Triunfo SD Board, that member generally represents an area of Ventura County not within the Triunfo SD service area. While no issues with this arrangement were reported, local accountability might be improved if the Triunfo SD considered the possibility of having an additional board member elected. This would increase accountability to ratepayers within the Triunfo SD. The Ventura Regional SD could maintain a member of the Triunfo SD board to continue the coordination of efforts and information and to provide a board member experienced in special districts. The suggested change in Triunfo Board composition might require a legislative change.

Compensation of elected and appointed officials reported is shown in Table III.16, Compensation for Elected Officials:

A majority of the agencies reported that regular review sessions of the requirements of the Brown Act, FPPC and public disclosure laws were scheduled; a few agencies noted that sessions were scheduled on an as-needed basis. None of the agencies noted any violations within the previous two years.

Public access was evaluated by regularly scheduled meetings and locations, by compliance with ADA and by the use of legally required notices. All but one agency noted the time and place of regularly scheduled meetings. During agency review of this report, the Triunfo SD added that their *"...Board meetings are held at 5:15 p.m. on the fourth Monday of each month at a published location within the District—usually the Oak Park Unified School District."*

Most agencies held meetings after working hours when they would be more accessible to residents. Only the agencies governed by the Ventura County Board of Supervisors and the Pleasant Valley CWD held meetings during working hours. All agencies stated that their meeting locations were easily accessible to the public and compliant with the requirements of ADA. All agencies reported compliance with the legal requirements for posting of meetings.

TABLE III.16  
COMPENSATION FOR ELECTED OFFICIALS

	BASIC STIPEND	LIMIT ON STIPEND	BENEFITS	OTHER
Camarillo	\$750/month*	\$750/month	Life, medical, dental, vision and retirement	Reimbursable limit--\$300/month (mayor)
Simi Valley	\$959/month*	\$959/month	Life, medical, dental, vision and retirement	Expense account limit--\$404/month
Thousand Oaks	\$1,309/month*		Medical, EAP, dental, vision and retirement	\$150 monthly limit on mileage
Calleguas MWD	\$200/mtg	\$2,000/month	Life, medical, dental, vision and retirement	Actual costs and \$0.36 per mile
Camarillo SD	\$100/mtg	\$600/month	Life, medical, dental, vision and retirement	Reimbursable limit--\$300/month
Camrosa WD	\$143/mtg	\$1,430/month	Medical, dental, and vision	Actual costs and \$0.36 per mile
Hidden Valley MWD	None	None	E&O insurance	None
Lake Sherwood CSD	\$7,083/month*	*	*	*
Pleasant Valley CWD	\$100/mtg	None reported	None reported	None reported
Triunfo SD	\$198/mtg	6 mtgs/month	Retirement (457 plan)	\$50/perdiem meals and \$0.36 per mile
Waterworks #1	\$7,083/month*	*	*	*
Waterworks #8	**	**	**	**
Waterworks #17	\$7,083/month*	*	*	*
Waterworks #19	\$7,083/month*	*	*	*
Ventura Regional SD	\$162/mtg	\$972/month plus reimbursable	None	\$50/perdiem meals and 4) 0.36 per mile

\*Compensation for City Council or Board of Supervisors; no additional compensation for dependent district

\*\*Compensation for City Council of Simi Valley; no additional compensation for dependent district

All agencies have public budget processes and reported that adopted budgets are made accessible to the public. Most agencies also post budgets on their website; six agencies do not (Calleguas MWD, Hidden Valley MWD, Pleasant Valley CWD, City of Simi Valley, Triunfo SD and the Ventura Regional SD). All agencies reported unqualified audits in 2002.

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## IV. OJAI-SAN BUENAVENTURA WATERSHED

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### IV.1 OJAI-SAN-BUENAVENTURA EXECUTIVE SUMMARY

Municipal service reviews are a new requirement for LAFCOs and were intended to promote more efficient services, to identify areas of improvement and to assess service provision in relation to boundaries and spheres of influence (SOI). Service reviews do not directly change the provision of service but are sources of comprehensive information LAFCO can use in future actions.

LAFCO must conduct service reviews prior to or in conjunction with the mandated five-year schedule for updating SOIs. The service review report must include an analysis of the issues and written determinations for each of the following:

- Infrastructure needs or deficiencies;
- Growth and population projections for the affected area;
- Financing constraints and opportunities;
- Cost avoidance opportunities;
- Opportunities for rate restructuring;
- Opportunities for shared facilities;
- Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers;
- Evaluation of management efficiencies; and
- Local accountability and governance.

The service review process for the water and wastewater agencies in Ventura County started in January of 2003 and will be completed in December of 2003. It began with a meeting of the agencies to discuss issues and to receive input on a three-part draft questionnaire. The questionnaire, which was sent to all 36 agencies, requested data on quantitative, qualitative and boundary issues. All the agencies were contacted individually and approximately 80 hours of interviews with staff and board members were conducted.

To ensure more focused analysis on service issues, Ventura County was divided into three sub-regional areas, which were roughly based on watershed boundaries. The three sub-regional service review areas are the Calleguas Creek, Santa Clara and Ventura River (Ojai-San Buenaventura) areas. Each of the 36 agencies was placed in only one subregional area although service issues might overlap. This service review report addresses the agencies located within the Ventura River (Ojai-San Buenaventura) watershed and includes the following eleven agencies:

- City of San Buenaventura
- Casitas Municipal Water District
- Meiners Oaks County Water District
- Montalvo Municipal Improvement District
- Ojai Basin Groundwater Management Agency
- Ojai Valley Sanitary District
- Ojai Water Conservation District
- Saticoy Sanitary District
- Ventura County Service Area No. 29
- Ventura County Service Area No. 32
- Ventura River County Water District

A database was designed and each agency's response to the questionnaire was entered into it. The database, which currently has approximately 15,000 entries, will be used for subsequent service reviews, sphere of influence studies and other Ventura LAFCO studies and analysis. The database can be changed and modified as the need and use for information becomes more focused.

The mapping information submitted by the agencies identified areas outside each agency's boundaries where service was currently being provided, areas of overlap with other agencies and any illogical service boundaries. These areas were mapped and have been labeled as "special study areas" for use in subsequent sphere of influence studies. Service issues and associated improvements identified during the process are addressed in more detail in the body of this report and are briefly summarized in the following paragraphs.

In general, it can be concluded that the agencies in the Ojai-San Buenaventura service review area are providing efficient services although there are areas where improvements may increase efficiency.

In the responses for the Ojai-San Buenaventura service review area, estimates of current population provided by the agencies were not consistent with regional estimates or not provided. While some agencies may not have had the opportunity to provide complete answers, the lack of consistent growth and population projections should be examined.

No significant infrastructure deficiencies were noted for any of the agencies during the service review. Infrastructure needs are assessed regularly by most of the agencies although the lack of response from some agencies is of concern. Easily accessible data regarding private and mutual water companies and their impact on water and wastewater service provision should be maintained.

In the Ojai-San Buenaventura service review area, nine of the eleven agencies had no significant special studies areas or SOI issues noted and updating the SOIs for these agencies should not require extensive analysis. There are discrepancies among the SOI, the SOAR/HVPA limits and parcel lines for the City of San Buenaventura, which should be reconciled. Several special study areas were identified for the Ojai Valley SD where the service area of the District and its current SOI are different. The SOI update for the Ojai Valley SD is expected to need more in-depth analysis by the Ventura LAFCO staff including CEQA review of potential growth inducing impacts.

However, there are government structure options, which might be considered by LAFCO prior to updating any of the SOIs for agencies in the Ojai Valley service review area. In the past Ventura LAFCO has recommended that the agencies involved form a committee to study the reorganization of public water purveyors in the region. However there are no records of any substantial action by the agencies or of the proposed committee. It is suggested that the Ventura LAFCO Commission reconsider the reorganization of water providers in the Ojai Valley either through initiating a reorganization proposal or by encouraging the agencies to reconsider the issue.

As with the water agencies in the Ojai Valley, it is suggested that government structure options for the City of San Buenaventura, the Montalvo MID and the Saticoy SD be considered. Since service and boundary issues among these agencies are more complex, it is additionally suggested that, prior to a reorganization proposal, that the three agencies work together to develop a plan for future service provision.

Ventura LAFCO might consider adopting a policy for “zero” spheres of influence and applying that designation for the water providers in the Ojai Valley until the possible reorganization of the agencies can be addressed. It is also suggested that Ventura LAFCO consider a zero SOI for the Montalvo MID and Saticoy SD.

Agencies answering the service review questionnaire reported well-established budget processes and procedures, which use internal cost/benefit studies to fully utilize opportunities to reduce or avoid costs. A significant opportunity for future shared facilities and avoidance of costs is in the expanded use of water reclamation in the Ojai Valley. The agencies involved in the various Ventura River studies related to the steelhead trout may want to consider the benefits of developing additional sources of reclaimed water.

No significant issues regarding local accountability and governance were noted for the agencies within the Ojai-San Buenaventura service review area. The governing boards of the agencies appear to be locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation.

Rates are generally similar for the water and wastewater agencies responding to the service review questionnaire. All agencies reported unqualified audits in 2002. No significant issues for any of the agencies were noted regarding management efficiency, rate restructuring opportunities or financing constraints.

The final version of the Governor’s Office of Planning and Research (OPR) Service Review Guidelines was published in August of 2003, and included information on addressing environmental justice concerns. Generally the agencies involved in the service review have already implemented many of OPR’s recommendations. However, only three of the agencies (Casitas MWD, Ojai Valley SD and the City of San Buenaventura) have websites that include copies of their budgets. It is suggested that the other agencies develop websites to increase dissemination of information, compliance with environmental justice issues and accountability to customers. Most of the agencies hold meetings at times that maximize public participation but agencies may want to investigate ways of translating documents to ensure that information is available in languages other than English. No other significant environmental justice issues were noted.

## **IV.2 PUBLIC AGENCY PROFILES**

### **a) Subregional Areas and Agencies**

Of the eleven public agencies in the Ojai-San Buenaventura service review area, five provide some form of wastewater services; two provide retail water service, and two are involved with groundwater issues. The City of San Buenaventura provides potable and reclaimed water as well as wastewater services to its residents. The Casitas MWD is primarily a wholesale water agency; however, it also provides recreational services some retail water and limited wastewater collection for portable sanitary facilities located in its recreational areas.

Each agency’s services and service area are described below. Exhibit IV.1, Ojai-San Buenaventura Service Review Agencies, shows the services each agency provides in a tabular format.

Ojai-San Buenaventura Service Review Area

- **Casitas MWD**

*The Casitas MWD supplies wholesale water, potable water to some areas, recreational services and water conservation programs. It also provides limited wastewater collection services for portable wastewater facilities.*

- **City of San Buenaventura**

*The City of San Buenaventura treats and distributes potable and reclaimed water as well as collects and treats wastewater.*

- **Meiners Oaks CWD**

*The Meiners Oaks CWD provides potable water to a service area encompassing approximately 1,300 acres.*

- **Montalvo MID**

*The Montalvo MID provides wastewater treatment and collection.*

- **Ojai Basin Groundwater Management Agency**

*The Ojai Basin Groundwater Management Agency monitors the quality and quantity of groundwater in the Ojai area. The agency does not provide direct water service.*

- **Ojai Valley Sanitary District**

*The Ojai Valley Sanitary District provides wastewater collection and treatment to the Ojai Valley north of the City of San Buenaventura.*

- **Ojai Water Conservation District**

*The Ojai Water Conservation District monitors the recharge of groundwater in the Ojai Valley area. The agency does not provide direct water service.*

- **Saticoy SD**

*The Saticoy SD provides wastewater collection and treatment to the unincorporated community of Saticoy.*

- **County Service Area #29 (North Coast)**

*Ventura County Service Area #29 operates and maintains a sewer system serving the coastal communities of Solimar Beach, Faria Beach, Mussel Shoals and Seacliff. The Ventura County Board of Supervisors is the governing body of the agency.*

- **County Service Area # 32**

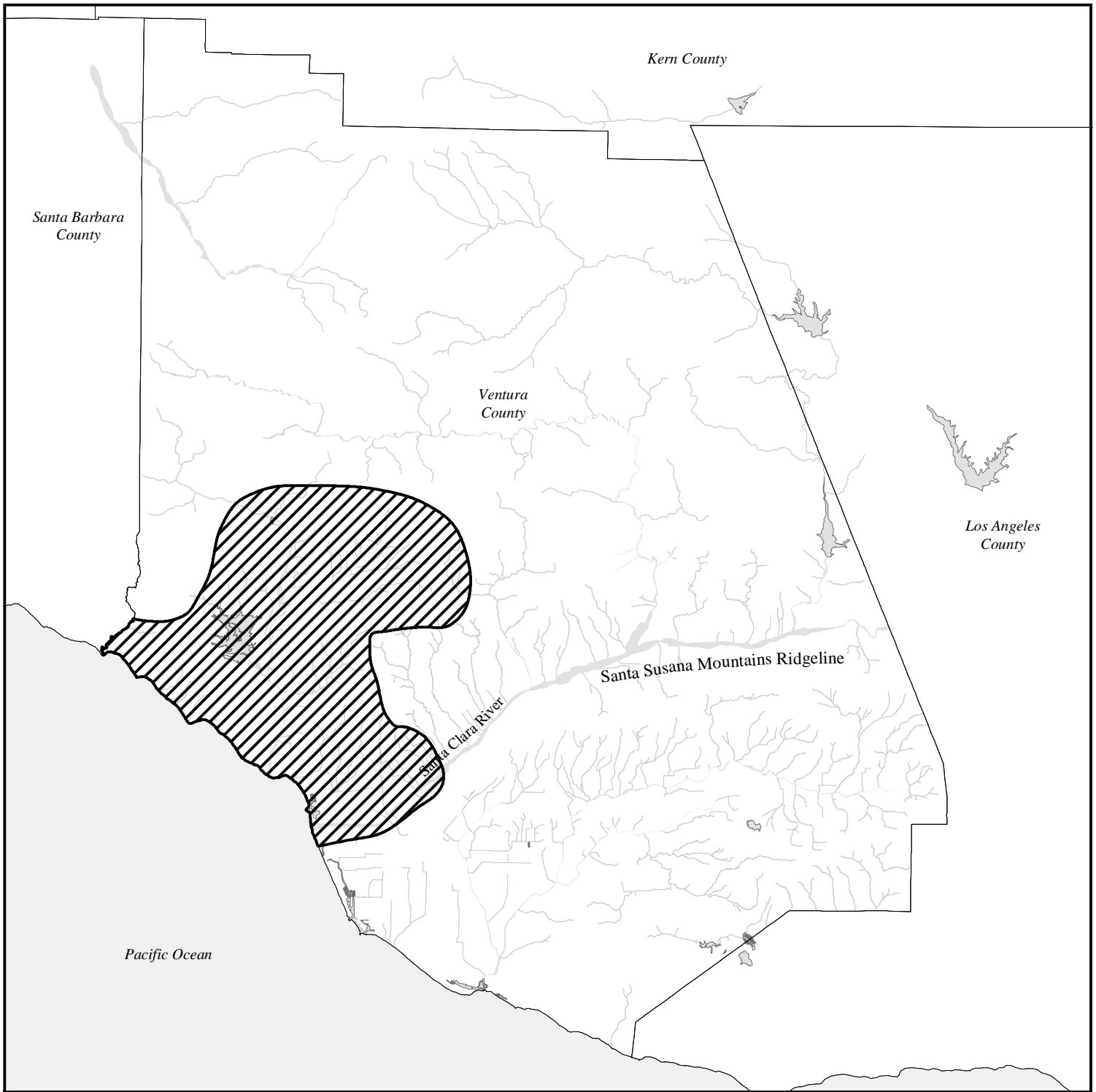
*Ventura County Service Area #32 permits and inspects on-site septic systems throughout Ventura County. The Ventura County Board of Supervisors is the governing body of the agency.*

- **Ventura River CWD**


*The Ventura River CWD provides domestic water and fire protection services to approximately 2,200 acres.*

Figure IV.1, Ojai-San Buenaventura Service Review Area, shows the regional location and general boundaries of the service review area addressed in this report.





**LEGEND**

 Ojai/Ventura Watershed Service Review Area

## Ventura LAFCO Ojai/Ventura Watershed Service Review Area

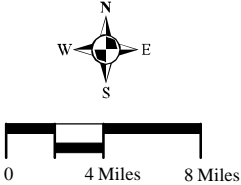


Figure IV.1

Copyright 2002 by County of Ventura. Design, maps, index and text of this map are copyrighted. It is unlawful to copy or reproduce, either in digital or paper form, any part thereof for personal use or resale.

Warning: This map was created by the Ventura County Computer Aided Mapping System (CAMS), which is designed and operated solely for the convenience of the County and related public agencies. The County does not warrant the accuracy of this map and no decision involving a risk of economic loss or physical injury should be made in relation thereon.

Accurate as of 7/28/03



**Exhibit IV.1  
 Ojai-San Buenaventura Service Review Agencies**

Ojai-San Buenaventura Agencies	WATER SERVICES	Retail Domestic Potable Water	Wholesale Water	Water Treatment	Recycled-Reclaimed Water	Agricultural Water	Groundwater Management	Water Replenishment	Water Conservation	WASTEWATER SERVICES	Sanitary Sewer Collection	Sanitary Sewer Treatment	Septic System Monitoring & Maintenance
	Casitas Municipal Water District	X	D	D	D	D	D	D	D	D	X	D	
City of San Buenaventura	X	D		D	D	D			D	X	D	D	
Meiners Oaks County Water District	X	D											
Montalvo Municipal Improvement District										X	D	D	
Ojai Basin Groundwater Management Agency	X						M						
Ojai Valley Sanitary District										X	D	D	
Ojai Water Conservation District	X						M	M	M				
Saticoy Sanitary District										X	D	D	
Ventura County Service Area No. 29										X	D	D	
Ventura County Service Area No. 32										X			D
Ventura River County Water District	X	D		D									

**Services Provided = X** (D=Direct, C=Contracted, M-Monitoring/Studies)

### IV.3 GROWTH AND POPULATION

With 1,864 square miles, Ventura County is in the median range for size among California's 58 counties, but ranks 11th in population with a Census 2000 count of 753,000. The County's median household income is \$59,600, which is higher than both the State average and that of nearby counties. The median income in both the Ojai and San Buenaventura areas was slightly below the countywide median income and was estimated by the 2000 Census to be \$44,593 and \$52,298, respectively.

The urban density in Ventura County rose from 7.61 people per acre in 1990 to 7.75 in 2000, which mirrors the statewide trend of increasing urban densities. The City of San Buenaventura had an estimated urban density of 7.5 people per acre while the City of Ojai's urban density is substantially lower at approximately 3 people per acre. From 1990 to 2000, the Countywide population grew by 11.2%, City of Ojai by 3% and the City of San Buenaventura by 8%.

Using data from the Ventura Council of Governments (VCOG), the following table (Table IV.1, Ojai-San Buenaventura Service Review Area Population Projections) has been developed:

TABLE IV.1  
OJAI-SAN BUENAVENTURA  
SERVICE REVIEW AREA POPULATION PROJECTIONS

	FORECAST 2005	FORECAST 2010	FORECAST 2015	FORECAST 2020	FORECAST 2025
Population	262,947	274,440	286,436	297,289	308,059
Dwelling Units (DU)	100,911	104,424	108,205	111,800	115,395
<b>Countywide Total</b>	<b>796,387</b>	<b>836,186</b>	<b>874,881</b>	<b>915,005</b>	<b>951,080</b>
<b>DOF Totals for Ventura County</b>	<b>818,600</b>	<b>877,400</b>	<b>934,000</b>	<b>1,007,200</b>	

VCOG's figures project population growth of approximately 4% during the five-year increments. Population projections from the State of California department of Finance (DOF) have been included as a comparison to VCOG data. The DOF projections for Ventura County project an increase in population of approximately 6%-7% during the same five-year periods.

Agencies included in the service review were asked to provide the estimated population as of 1/2003 for their existing service area. The data is summarized in Table IV.2, Agency Projections of Current Population. Agencies that either did not answer the question or did not know the population of their agency are entered as "None Reported". The population estimates provided by the agencies are obviously incomplete; it is unrealistic to expect that the service review area, which has only a 10% increase in population over the previous decade, would have a 50% increase in the next two years. Accurate population projections are critical for predicting future service demands and the lack of a generally accepted, consistent source and methodology for projecting future growth and population projections is an issue in the Ojai- San Buenaventura service review area.

Of the agencies that answered the question “How does your agency determine the projected growth within its current boundaries including sphere of influence?” four agencies (Casitas MWD, Meiners Oaks CWD, Montalvo MID and Saticoy SD) noted that the service area was built-out and no growth was expected. While this may be accurate for the Meiners Oaks CWD, Montalvo MID and Saticoy SD, it seems inconsistent with VCOG and DOF population estimates for the Casitas MWD service area.

The City of San Buenaventura noted that their population projections were based on their General Plan. CSA #29 uses population projections prepared by the Southern California Association of Governments (SCAG), the Ventura Council of Governments (VCOG) and Ventura County.

The Ventura River CWD has a computerized system that can accurately locate parcels within its agency boundaries that might be expected to develop. The District also noted that it expected that there would be more increased service demands from lot splits and ancillary units than from growth.

TABLE IV.2  
 AGENCY PROJECTIONS OF  
 CURRENT POPULATION

AGENCY	ESTIMATED POPULATION 1/2003
Casitas MWD	67,785
San Buenaventura	106,848
Meiners Oaks CWD	4,000
Montalvo MID	1,200
Ojai Basin GMA	None Reported
Ojai Valley SD	None Reported
Ojai Water CD	None Reported
Saticoy SD	1,000
CSA #29	1,053
CSA #32*	*
Ventura River CWD	5,988
<b>Total</b>	<b>120,089</b>

\*The service area of CSA#32 encompasses Ventura County

The final OPR Guidelines for Municipal Service Reviews recommended that service review reports address environmental justice issues, including the provision of affordable housing. Housing affordability is an increasingly important issue in Ventura County, with a significant number of households in the region paying more than 40% of the household’s total income for housing. Of the 11 agencies included within the Ojai-San Buenaventura service review report, only the City of San Buenaventura provides both water/wastewater services and has responsibility for meeting regional “fair share” housing goals. Affordable housing information from both the City of San Buenaventura and Ventura County, for the unincorporated areas, is summarized in the following paragraphs. Ventura County’s Housing Element has been approved by the Housing and Community Development Department of the State of California; the City’s is being reviewed.

The Ventura County General Plan (2001) establishes housing objectives for the unincorporated area for the period from 1998 to 2005. The affordable housing objectives were assigned to the County by SCAG and are shown in Table IV.3, Regional Housing Objectives for Unincorporated Areas.

TABLE IV.3  
REGIONAL HOUSING OBJECTIVES FOR UNINCORPORATED AREAS

INCOME CATEGORY	SCAG HOUSING OBJECTIVES	% OF NEEDS BY INCOME CATEGORY	ANNUAL HOUSING NEEDS	% OF HOUSING OBJECTIVES BEING MET
Upper	690	41%	92	70%
Moderate	334	20%	45	115%
Low	250	15%	33	160%
Very Low	404	24%	54	70%
<b>TOTAL</b>	<b>1,678</b>	<b>100%</b>	<b>224</b>	<b>92%</b>

Source: SCAG - May 2, 2000

Housing prices and rents for apartments are relatively high in the City of San Buenaventura. In 2000, the median sales price of new and existing single-family homes was \$239,000 for a two-bedroom unit and as of January 2001, the average apartment rent was \$879 for a one-bedroom unit with vacancy rates averaging approximately 2%.

Economic studies for the City project employment to grow from between 10,000 to 15,000 jobs generating demand for additional housing for a wide range of income levels. However, a significant portion of the City's workforce is employed in lower-paying occupations (i.e., retail workers, service employees, and agricultural workers) that are in particular need of housing assistance.

The City has adequate land to address its remaining regional housing needs of 1,230 new units through 2005 although over 40% of this development is dependent on intensification of underutilized sites.

In terms of environmental justice concerns, the agencies that responded to service review questionnaire do not discriminate between economic or ethnic groups in terms of rates of service delivery. Most water and wastewater providers have programs to help customers reduce costs. No other significant issues were noted.

#### IV.4 INFRASTRUCTURE

The legislation requiring service reviews provided little direction to LAFCOs for evaluating infrastructure needs and deficiencies. The Governor's Office of Planning and Research (OPR) developed Service Review Guidelines, which were finalized in August of 2003, included twelve suggested factors LAFCOs could use in identifying an agency's infrastructure needs and deficiencies. Several of the factors, including governmental structure options, duplicative facilities and locations of facilities, have been addressed in other portions of this report.

The Ventura LAFCO service review questionnaire used the presence and frequency of master plans as well as an annual capital improvement (CIP) budget as a means of assessing an agency's process of evaluating infrastructure needs and deficiencies. Master plans and CIPs, as plans for future service needs, are public documents reviewed the governing body, other affected agencies and the public. Agencies that are small, provide limited service, or are fully built-out may not have master plans; however, most public agencies prepare annual CIP budgets as a means of meeting current and future service needs.

Agencies were asked the date of the current master plan and previous master plan. While there are no established standards for the frequency of preparation, typically master plans for water and wastewater agencies are prepared every 5-10 years. The type of service area (i.e., level of development, rate of growth or presence of growth control initiatives) can also affect the frequency of preparation. Table IV.4, Master Plans and CIPs, shows the agencies and information regarding master plans and capital improvements budgets.

TABLE IV.4  
 MASTER PLANS AND CIPS

	WATER MASTER PLAN	DATE	CIP BUDGET	WASTEWATER MASTER PLAN	DATE	CIP BUDGET
Casitas MWD	None Reported	None Reported	Yes			
San Buenaventura	Yes	1993	Yes	Yes	1997	Yes
Meiners Oaks CWD	None Reported	None Reported	None Reported			
Montalvo MID				No	NA	Yes
Ojai Basin GMA	Yes	1994	No			
Ojai Valley SD				No	NA	Yes
Ojai Water CD	NA	NA	NA			
Saticoy SD				No	NA	Yes
CSA #29				No	NA	No
CSA #32				NA	NA	NA
Ventura River CWD	No	NA	Yes			

The service review questionnaire also asked for a wide range of information regarding the capacity, age, storage, peak demand and sources of water. The data was collected to allow Ventura LAFECO to adopt the legally required determinations for service reviews while also building a database of information that could be used to analyze and update spheres of influence and future annexation/detachment proposals.

Table IV.5, Water System Information, depicts data obtained from responses to the service review questionnaire regarding number of customers, capacity and the system/facilities of the retail systems.

TABLE IV.5  
WATER SYSTEM INFORMATION

	TOTAL # OF CONNECTIONS	MILE OF LINES	STORAGE	ESTIMATED PEAK DEMAND	ESTIMATED PEAK CAPACITY	PERMITS CURRENT
Casitas MWD	2,958	91	26 mg	100 cfs	100 cfs	Yes
City of San Buenaventura	29,200	400	60 mg	22,503 AF	26,500 AF	Yes
Meiners Oaks MID	1,266	None Reported	None Reported	None Reported	None Reported	None Reported
Ventura River CWD	2,108		2.5 days	1,400 gpm	2,200 gpm	Yes

Infrastructure needs and deficiencies were adequately addressed by the City of San Buenaventura through its master plans, Biennial Water Supply and Urban Water Management Plans. Of the agencies that reported being built-out with no growth expected, Montalvo MID, Saticoy SD and the Ventura River CWD have annual CIP programs, which address infrastructure needs and deficiencies. The Meiners Oaks CWD and Ojai Water Conservation District did not report master plans, annual CIP programs or include budgeted amounts for capital improvements.

The Ojai Basin Groundwater Management Agency provided a copy of their 2002-2003 Annual Report. The Ojai Water Conservation District, which is a member of the Ojai Basin GMA, noted that demands for additional water from Lake Casitas for steelhead trout habitat could result in rationing of water for agricultural use and in the subsequent increased reliance on ground water. The Ojai Water CD suggested that the Ojai Basin GMA study the storage capacity of the basin. This issue is especially important since groundwater supplies more than 50% of the total water used in the Ojai Basin service area. There are currently 111 active wells (out of 174 recorded wells) in the Ojai Basin GMA service area with approximately 4,000 af extracted annually. 45 wells are dedicated to agricultural use which also accounts for approximately 54% of the total amount of groundwater used. In 2002, approximately 5,000 af of groundwater was extracted. The future use of groundwater in the Ojai Valley area is an issue for the service review area.

A related issue specific to Ventura County and important in the Ojai-San Buenaventura service review area is the presence of private and mutual water companies and their impact on water supply and demand. Although private water service providers, both investor-owned and mutual, are outside LAFCO's jurisdiction, they serve important roles in the provision of service. Some of the larger private and mutual water agencies are virtually indistinguishable from public agencies; they plan for present and future infrastructure needs, meet all regulatory requirements and have adequate financial resources. In the Ojai-San Buenaventura service review area, several of the private and mutual water companies participate in regional groups such as the Ojai Basin Groundwater Management Agency and the Ventura River Habitat Conservation Plan. However, other small private and mutual water companies may difficulty reaching economies of scale and may have issues with water quality, water supply and/or infrastructure.

It is sometimes difficult for local agencies and customers to obtain rate, capacity and other information about private/mutual water purveyors. Planning for Ventura County's future infrastructure needs and deficiencies must include appropriate information from all water agencies. It is suggested that the Ventura LAFCO database be expanded to include information

regarding private and mutual water companies in order to more accurately assess present and probable service demand and supply.

**a) Wholesale Water**

The Casitas MWD is the wholesale agency for the service review area.

**b) Wastewater Agencies**

Wastewater agencies and departments were asked a similar series of questions about the capacity of their facilities. Agency responses and additional information taken from the State Water Resources Control Board report, "Wastewater User Charge Survey Report FY 2001-02", are summarized in the Table IV.6, Wastewater Agency Information.

TABLE IV.6  
 WASTEWATER AGENCY INFORMATION

	TOTAL # OF CONNECTIONS	RATED CAPACITY (MGD)	ADWF* (MGD)	TREATMENT LEVEL	MILES OF LINES	PERMIT VIOLATIONS
San Buenaventura	24,657	14	9.3	Tertiary	375	Yes
Montalvo MID	1,280	0.36	0.300	Secondary	8	No
Ojai Valley SD	7,500	3	1.950	Tertiary	120	Yes
Saticoy SD	817	0.25	0.100	Primary	3	No
CSA # 29	317	**	0.085	Secondary	None Reported	No
<b>Total</b>	<b>34,571</b>	<b>12.9</b>	<b>10.8</b>			

\*Average Dry Weather Flow; \*\*CSA#29 discharges wastewater to the City of Oxnard system.

Of the agencies providing wastewater services, one (City of San Buenaventura) currently provides reclaimed water, one (Saticoy SD) is currently working with two other jurisdictions to provide water reclamation and one (Ojai Sanitary District) is considering the provision of reclaimed water. There may be possibilities for increasing water reclamation in the Ojai Valley, which have been discussed in Section IV.8 Opportunities for Shared Facilities.

**IV.5 FINANCING CONSTRAINTS AND OPPORTUNITIES**

To evaluate financial constraints and opportunities in relation to existing and projected service needs, the service review questionnaire collected data regarding total revenues and expenditures, bond ratings, reserve levels and the presence of audits.

Agencies were also asked to identify any financing constraints and opportunities that affect the service provided and the infrastructure needs. The intent was to find any specific constraints or opportunities beyond existing legislative, political and governmental regulations. Few agencies identified any additional financing constraints except for the limits placed on them by their size and by increased regulations. Most agencies noted that their governing board looked at rates annually to ensure a balance between rates and capital needs.

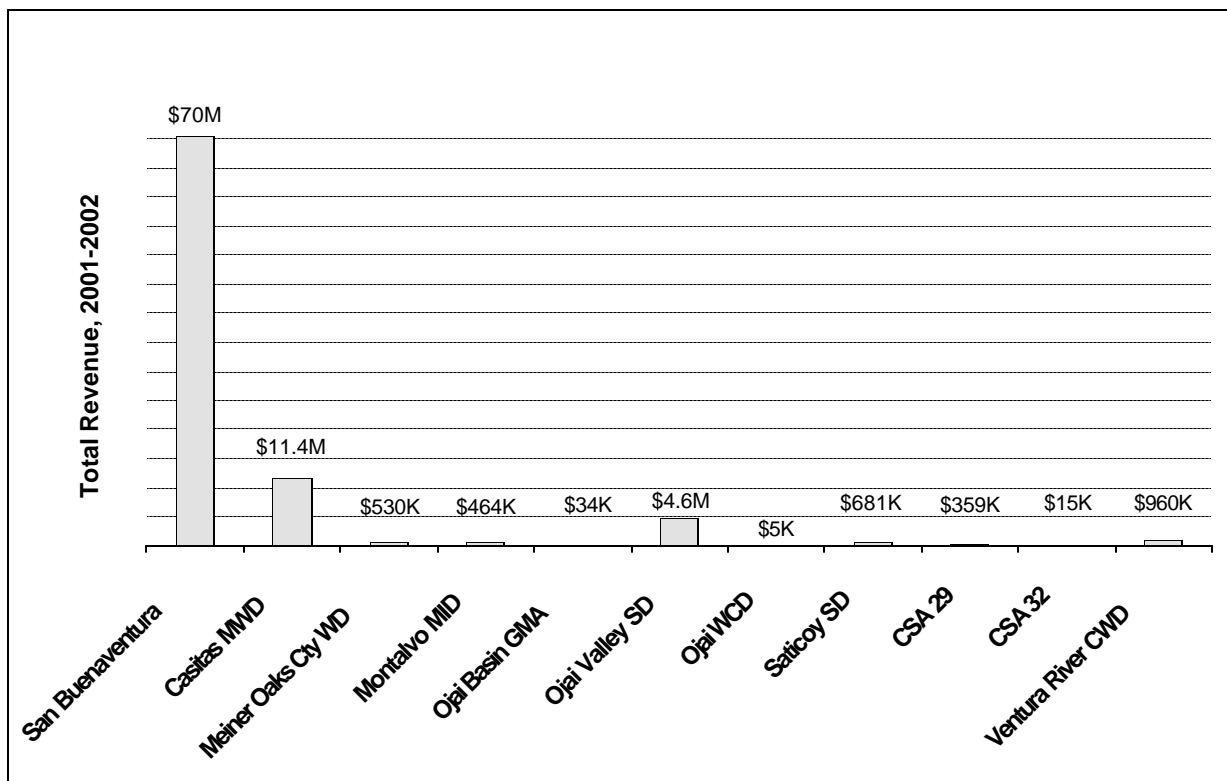
The service review questionnaire asked agencies to provide total revenues, revenue sources, CIP budget and reserves for the previous three fiscal years, which is summarized in tables contained in Appendix A.



No significant financial opportunities and constraints were noted for the agencies. However, some of the smaller agencies in the Ojai-San Buenaventura service review area cannot always find economies of scale or may not be able to use some financing mechanisms available to larger agencies.

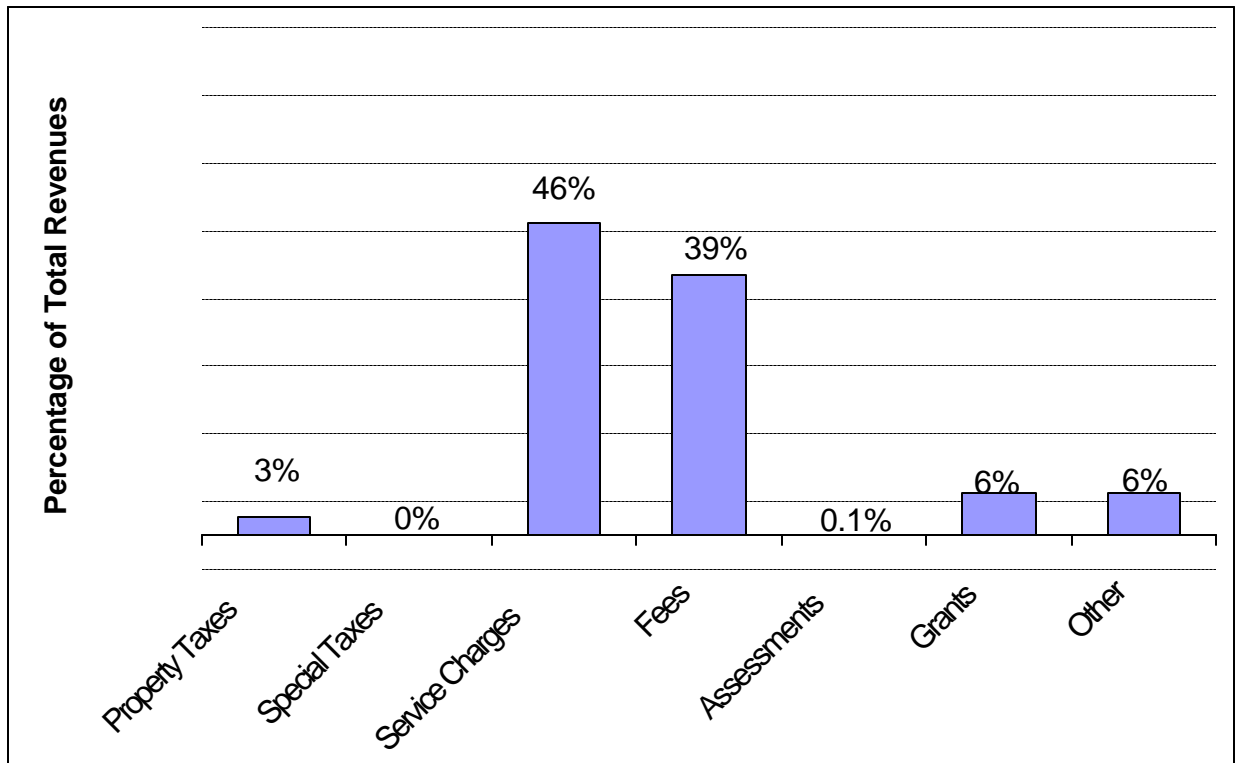
Exhibit IV.2, Agency Revenue Comparison, and Exhibit IV.3, Aggregate Sources of Agency Revenue, compare total revenues for all agencies and aggregate sources of revenues. Data from FY 2001-2002 was used to compare actual numbers. The information for the City of San Buenaventura includes both water and wastewater revenues.

Exhibit IV.2  
2001-2002 AGENCY REVENUE COMPARISON



As enterprise activities, the primary revenue source for all water and wastewater agencies comes from service charges and fees directly related to the provision of services. Other income generally comes from interest from various funds. Exhibit IV.3, 2001-2002 Aggregate Sources of Agency revenues, shows that water and wastewater agencies, as enterprise funds, derive by far the majority of their income from service charges and fees. Approximately 50% of the total aggregate revenue in the Ojai-San Buenaventura service review area came from the Casitas MWD's water sales and charges; Casitas also received a \$3,000,000 grant during the same fiscal year.

Exhibit IV.3  
2001-2002 AGGREGATE SOURCES OF AGENCY REVENUES



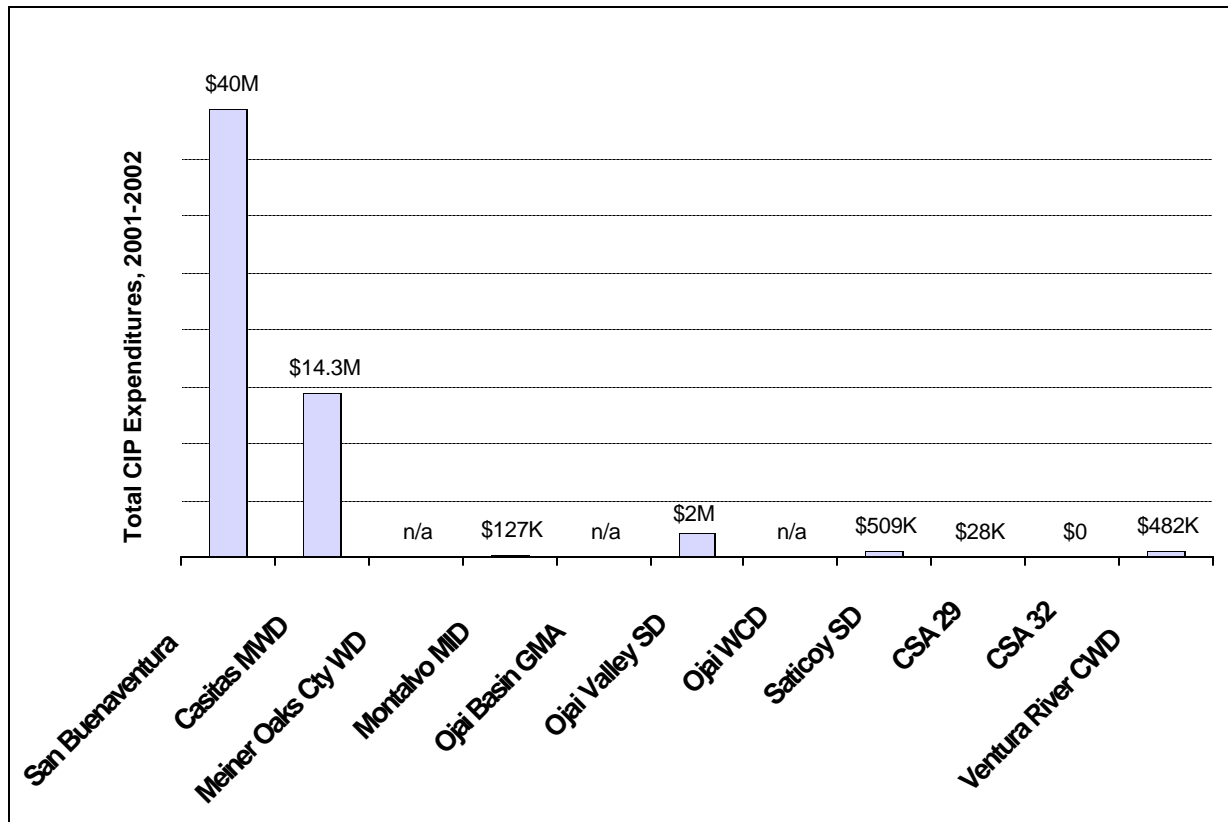
The amount of property tax revenue each agency received during FY 2001-2002 is shown in Table IV.7, 2001-2002 Property Tax Revenue. Property tax revenue for the City of San Buenaventura was not included in this report; it was assumed that property taxes are not used by the City to fund enterprise activities.

TABLE IV.7  
2001-2002 PROPERTY TAX REVENUE

	PROPERTY TAX REVENUE
Casitas MWD	\$880,000
San Buenaventura	
Meiners Oaks CWD	\$23,967
Montalvo MID	\$178,169
Ojai Basin GMA	0
Ojai Valley SD	\$187,900
Ojai Water CD	\$3,911
Saticoy SD	\$16,000
CSA #29	0
CSA #32*	\$1,920
Ventura River CWD	\$19,358
TOTAL	\$1,311,225

A comparison of the capital improvement budgets for the Fiscal Year 2001-2002 is shown in Exhibit IV.4, 2001-2002 Agency CIP Comparisons. As with revenues, the CIPs for the water and wastewater departments of the City of San Buenaventura have been combined.

Exhibit IV.4  
2001-2002 AGENCY CIP COMPARISON

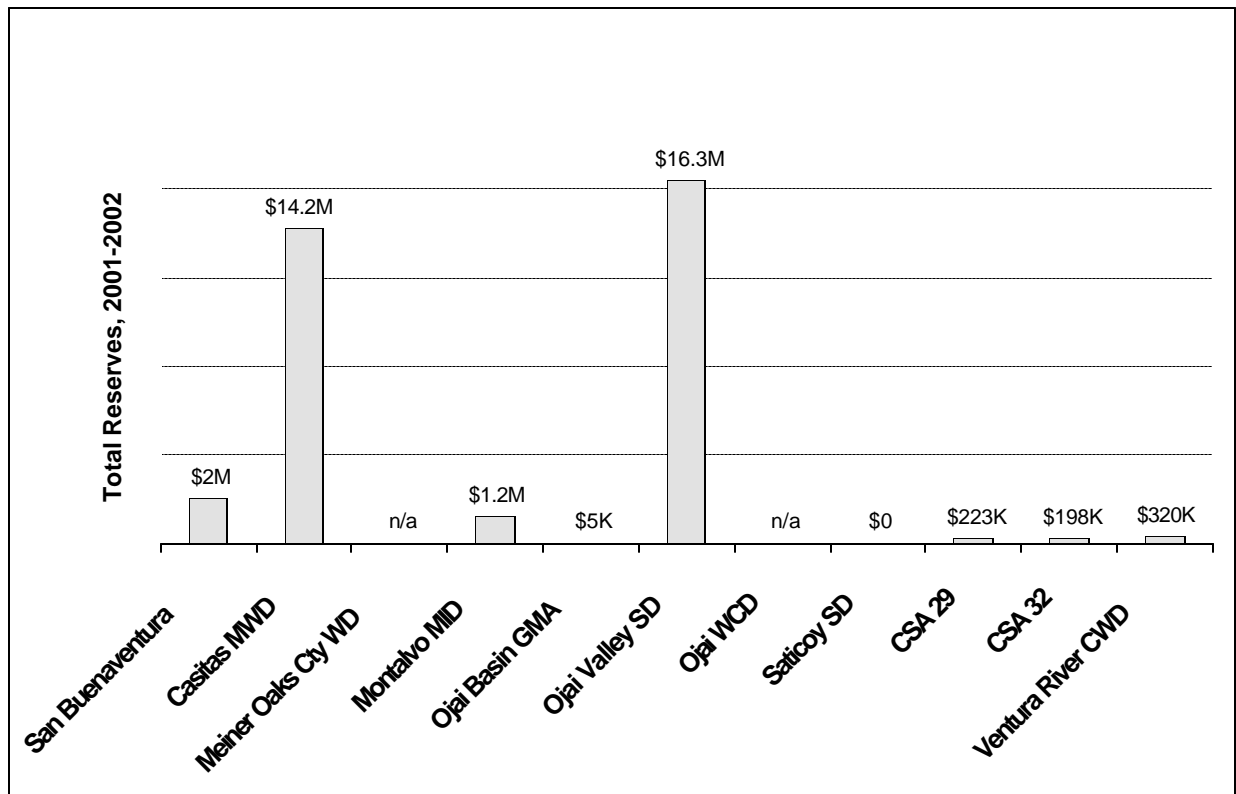


Data about agency reserve levels was also collected as part of the service review. The issue of reserve levels was raised as a general statewide concern in the 2000 Little Hoover Commission report on special districts. That report concluded that some agency reserves appear unreasonably large, are not integrated into infrastructure planning and are obscure. Data collected for this service review did not find that the agencies in the Ojai-San Buenaventura service review area showed evidence of the concerns noted by the Little Hoover Commission for agencies in other parts of California.

Ventura LAFCO asked agencies to report reserves in the categories of operating, capital, rate stabilization, restricted and other for the previous three fiscal years. Exhibit IV.5, 2001-2002 Agency Reserve Comparison, compares combined reserve amounts.

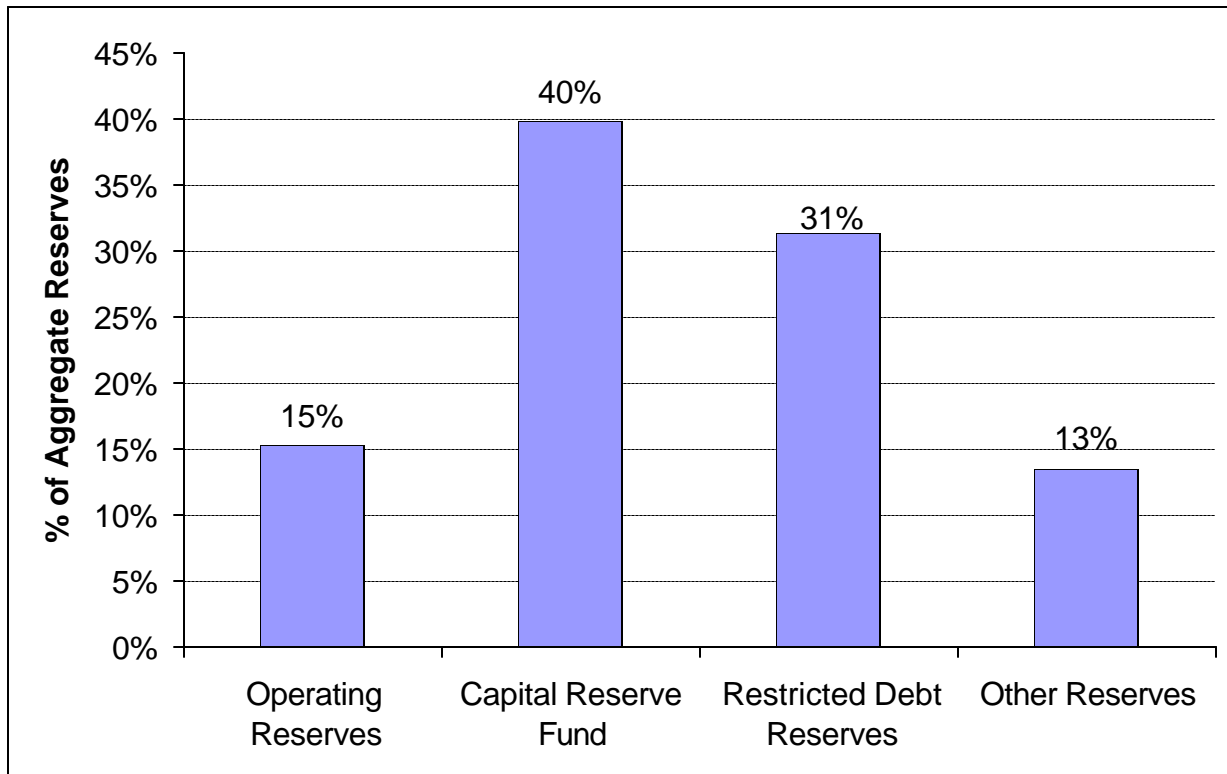
Setting specific levels of reserves for the diversity of agencies addressed in this service review report is impracticable. The different services, service areas, customer bases, condition of infrastructure, capital improvement programs and other issues require reserve levels specific to each agency. Agencies with large reserves typically have major, long-term capital improvement projects. For example, the Ojai Valley Sanitary District apparently has substantial reserves; however, their reserves are earmarked for collection systems improvements (20%), treatment plant upgrades/expansions (40%) and restricted reserves for bonds (30%). All reserve levels reported by the agencies were clearly segregated into the uses for the reserves—operating and rate stabilizations, restricted debt reserves and capital reserves funds.

Exhibit IV.5  
 2001-2002 AGENCY RESERVES COMPARISON



In the service review questionnaire, agencies were asked to report operating reserves and operating/rate stabilization reserves separately. Operating reserves were defined as unallocated general reserves that are set-aside for budgetary shortfalls or for purposes not otherwise specifically designated. Operating and rate stabilization funds were defined as funds used to temper short-term fluctuations in delivery costs and to maintain constant and predictable rates to customers. Due to an error in the service review questionnaire, these definitions were not clear and some agencies noted in their responses that the two categories were typically considered the same. Therefore in Exhibit IV.6, Aggregate Reserves by Category, the two categories of reserves, Operating and Operating/Rate Stabilization, were combined.

Exhibit IV.6  
AGGREGATE RESERVES BY CATEGORY



As mentioned previously, there are no generally accepted levels for operating reserves. However, the Little Hoover Commission report noted that the International City Managers Association recommends, as one criteria of solvency, that a city government have three months of operating expenses in reserves. Using that criterion, Table IV.8, Estimated Three Month Reserves, shows the estimated monthly and three month total of operating expenses for each agency, the combined amount of Operating/Operating and Rate Stabilization reserves and the number of months of operating reserves reported by the agencies. In general, special districts have more than three months operating reserves due to fluctuations in costs and the absence of other reserves often held by municipalities.

TABLE IV.8  
 ESTIMATED 3-MONTH RESERVES

	ESTIMATED MONTHLY OPERATING EXPENSES	ESTIMATED THREE MONTH OPERATING EXPENSES	TOTAL OPERATING RESERVES	NUMBER OF MONTHS OF OPERATING RESERVES
Casitas MWD	\$1,465,154	\$488,384	\$2,987,913	6
San Buenaventura	\$2,144,139	\$6,432,417	**	NA
Meiners Oaks CWD	Expenses Not Reported	Expenses Not Reported	\$251,000*	
Montalvo MID	\$33,879	\$101,639	\$400,000	12
Ojai Basin GMA	\$2,682	\$8,047	None Reported	
Ojai Valley SD	\$400,468	\$1,201,403	\$1,792,704	4
Ojai Water CD	\$419	\$1,258	None Reported	
Saticoy SD	\$27,436	\$82,310	None Reported	0
CSA #29	\$27,436	\$82,319	\$70,000	3
CSA #32*	\$2,626	\$7,879	\$8,944	3
Ventura River CWD	\$59,984	\$179,953	\$320,000	5

\* Operating reserves for FY 2000-2001

\*\* The City did not report actual reserve amounts but noted that in FY 2000-2001 the reserves were 11% and 8% for the water and wastewater funds respectively.

## IV.6 COST AVOIDANCE OPPORTUNITIES

In evaluating cost avoidance opportunities, Ventura LAFCO examined current practices used by the agencies to reduce or avoid costs including the use of outside vendors and contractors. Overlapping or inefficient service boundaries were also examined as a means that Ventura LAFCO can use to encourage efficiently provided water and wastewater services and avoid costs.

As part of the service review process, all water and wastewater agencies were given LAFCO-generated maps of their jurisdictional and sphere of influence boundaries. Agencies were asked to note on the maps:

- Areas of duplication of planned or existing facilities with another agency
- Areas better served by another agency

- Areas better served by the responding agency
- Areas outside the agency’s boundaries which currently receive service
- Areas difficult to serve or with illogical boundaries

Ventura LAFCO and the consulting team mapped the changes noted by the agencies and labeled them as “special study areas”. During interviews, the staff of some agencies also noted areas with service issues, which were also mapped. The service provision issues of the special study areas were not studied in depth as part of the service review. The purpose was to update the Ventura LAFCO GIS-based maps so staff could use them for future studies as well as a means of ranking subsequent SOI studies

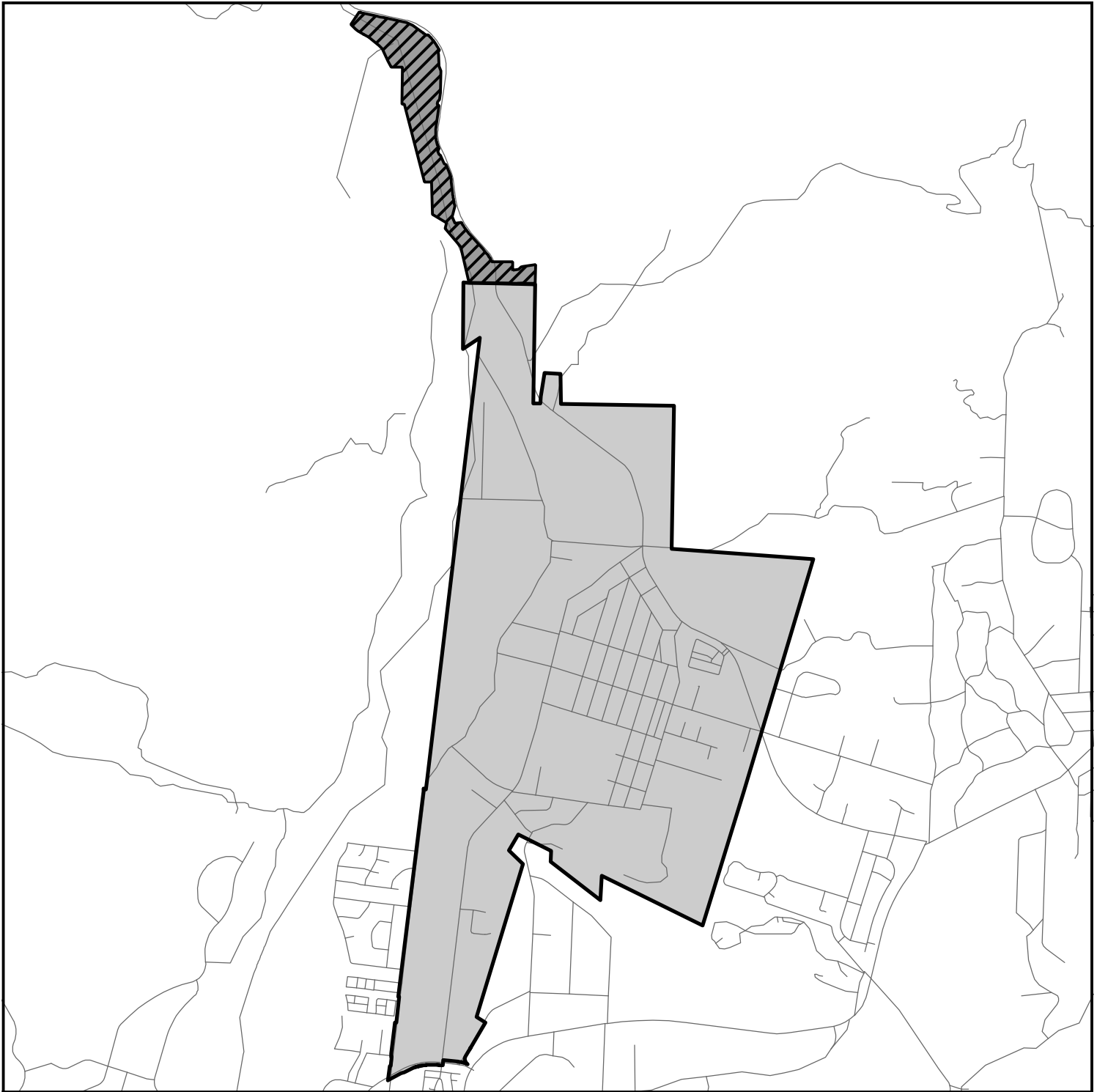
Table IV.9, Special Study Areas, lists the agencies included within the Ojai-San Buenaventura service review area with special study areas and SOI issues. Maps for those agencies with issues or special study areas are also included and labeled as:

- ★ Figure IV.2 Meiners Oaks MWD
- ★ Figure IV.3 Montalvo MID
- ★ Figure IV.4 Ojai Valley SD
- ★ Figure IV.5 City of San Buenaventura
- ★ Figure IV.6 Ventura River CWD





Revised maps for all agencies with suggested study areas are included in the updated Ventura LAFCO GIS system.

TABLE IV.9  
SPECIAL STUDY AREAS

	SPECIAL STUDIES AREAS	SUMMARY OF ISSUE	ESTIMATED LEVEL OF ANALYSIS REQUIRED
Casitas MWD	None Noted	NA	Low
San Buenaventura	Yes	1) Discrepancies between SOAR, HVPA and SOI	Moderate
Meiners Oaks CWD	Yes	1) Agency facilities outside boundaries	Low
Montalvo MID	Yes	!) Discrepancy between SOI and current service area	Low
Ojai Basin GMA	None Noted	NA	Low
Ojai Valley SD	Yes	1) Areas outside agency receiving services 2) Areas within agency but outside SOI 3) SOI issues	High
Ojai Water CD	None Noted	NA	Low
Saticoy SD	None Noted	NA	Low
CSA #29	None Noted	NA	Low
CSA #32	None Noted	NA	Low
Ventura River CWD	Yes	1) Areas not in current SOI or requiring service	Low



**LEGEND**

-  Meiners Oaks County Water District Sphere
-  Meiners Oaks County Water District
-  Possible Sphere-of-Influence Change
-  Special Study Areas

## Ventura LAFCO Meiners Oaks County Water District

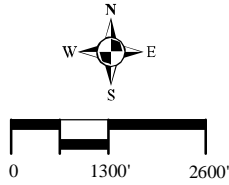


Figure IV.2

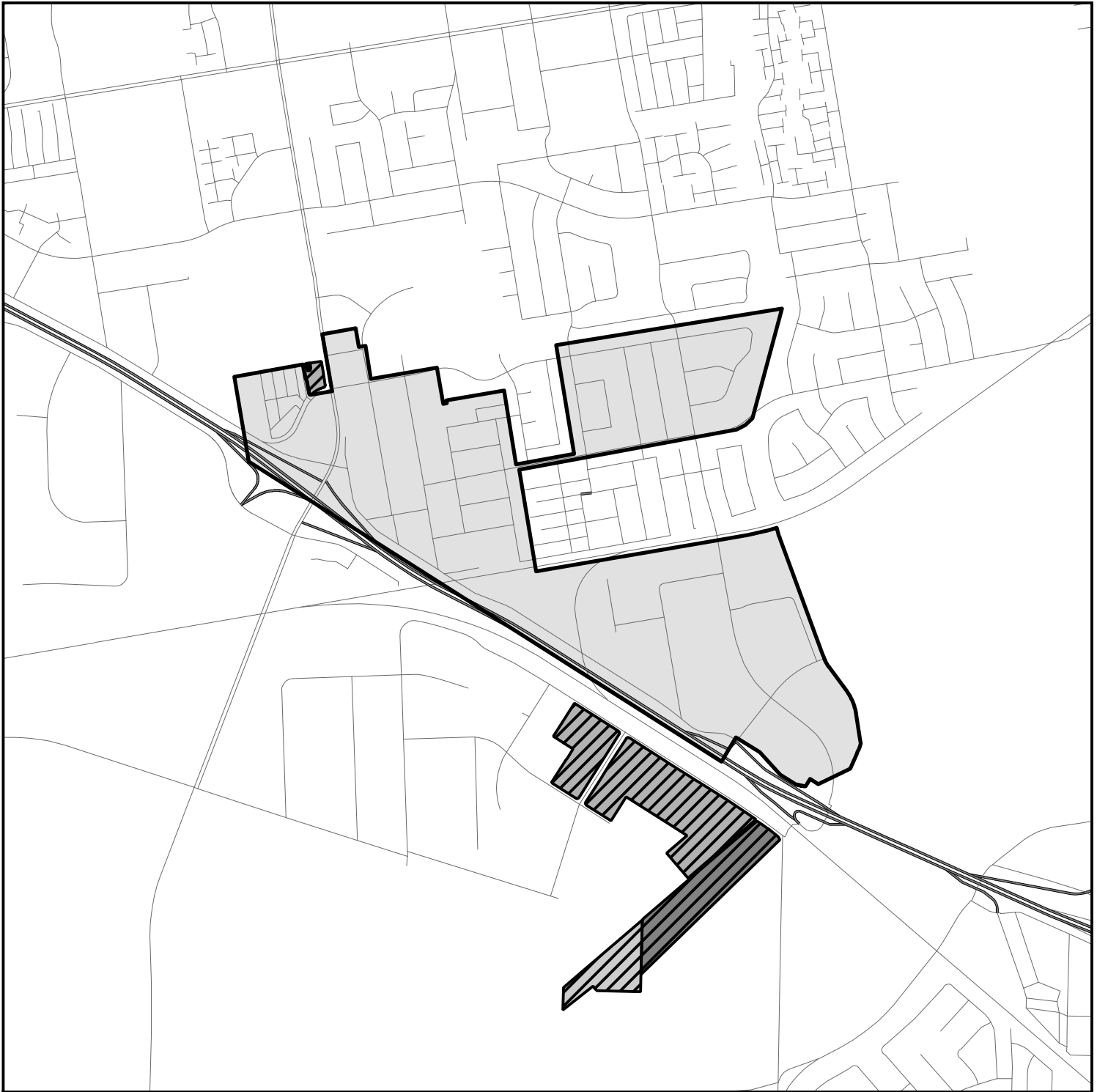
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




Accurate as of 8/21/03







**LEGEND**

-  Montalvo Municipal Improvement District Sphere
-  Montalvo Municipal Improvement District
-  MMID Facilities
-  Areas Outside Sphere and District, but Served by MMID
-  Areas the MMID Could Serve (currently using septic systems)
-  Special Study Areas

## Ventura LAFCO Montalvo Municipal Improvement District

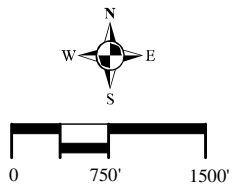
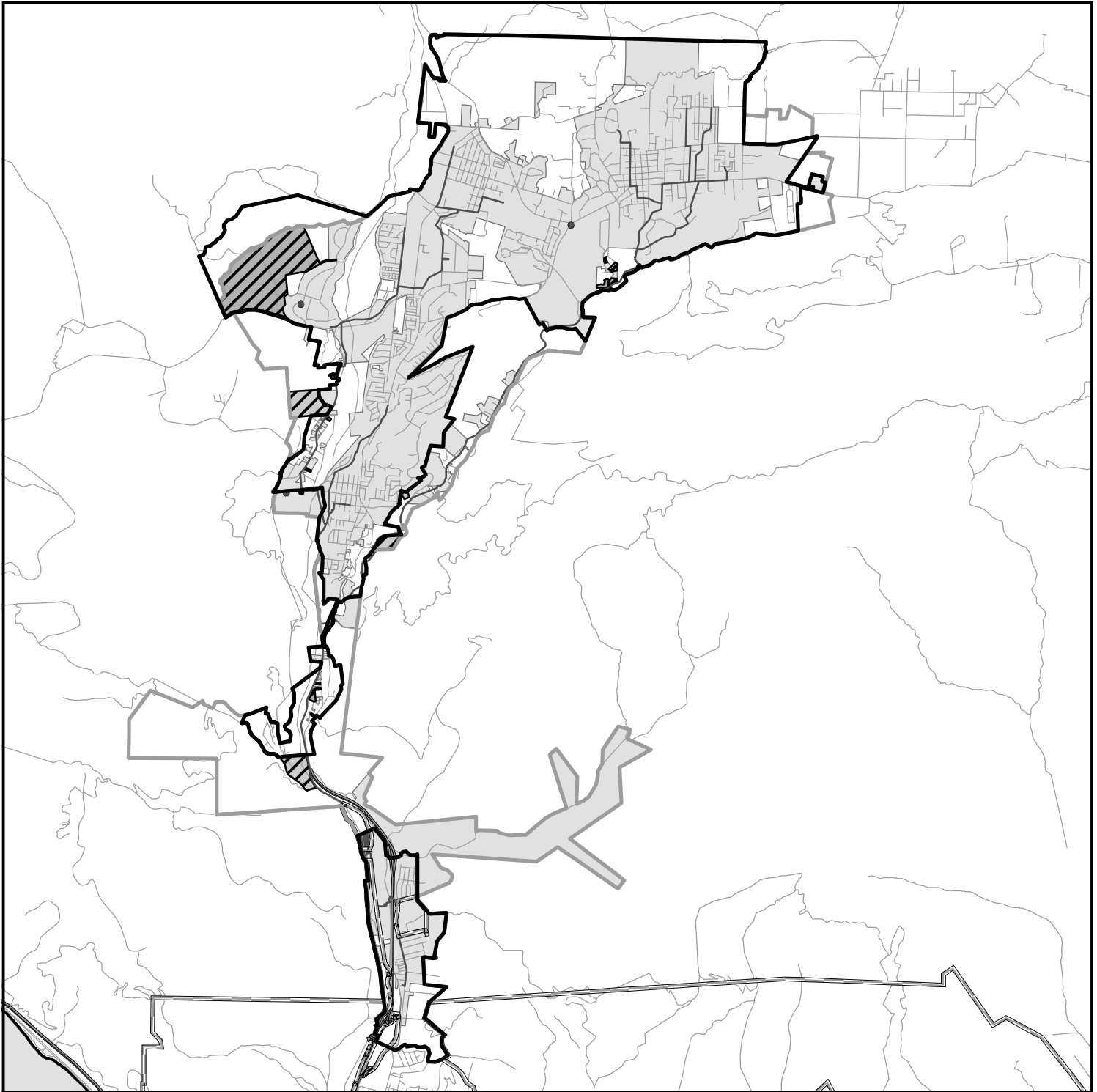


Figure IV.3









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**LEGEND**

-  Ojai Valley Sanitary District Sphere
-  Ojai Valley Sanitary District
-  Possible Sphere-of-Influence Change
-  Areas inside sphere/outside agency
-  Areas outside sphere and agency, but served by Ojai Valley Sanitary District
-  Ojai Valley Sanitary District Facilities
-  Special Study Areas
-  Ventura SOAR/HVPA Boundary

## Ventura LAFCO Ojai Valley Sanitary District

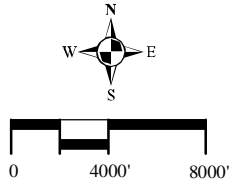


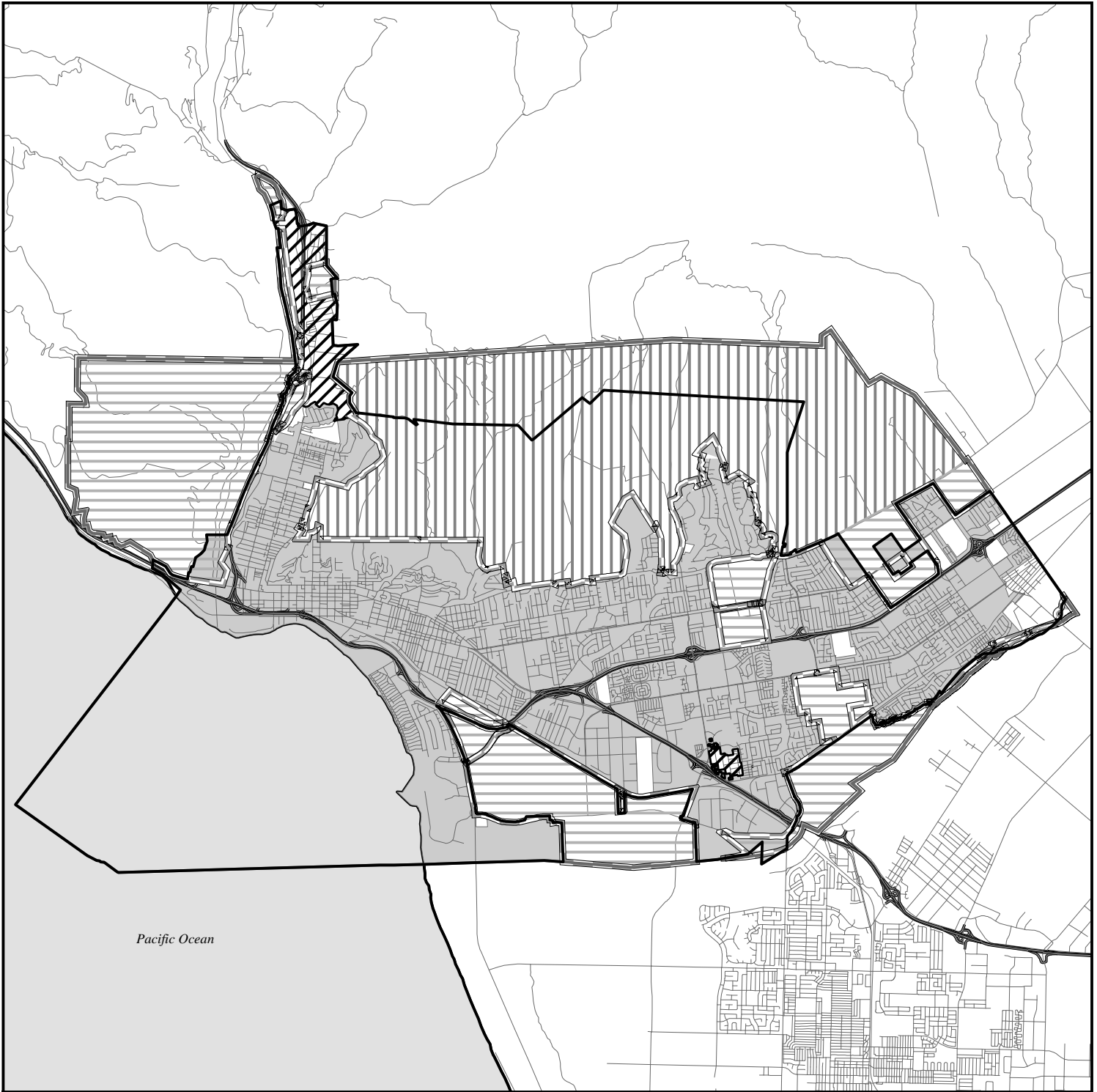
Figure IV.4

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 707 B STREET, SUITE 800, SAN DIEGO, CA 92101  
 619-235-6471 FAX 619-234-0349



**LEGEND**

-  City of San Buenaventura Sphere of Influence
-  Possible Sphere of Influence Change
-  City of San Buenaventura
-  SOAR/HVPA Boundary
-  SOAR Area
-  HVPA Area
-  Special Study Areas

# Ventura LAFCO

## City of San Buenaventura

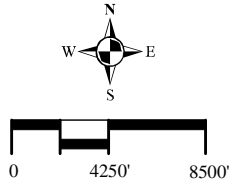


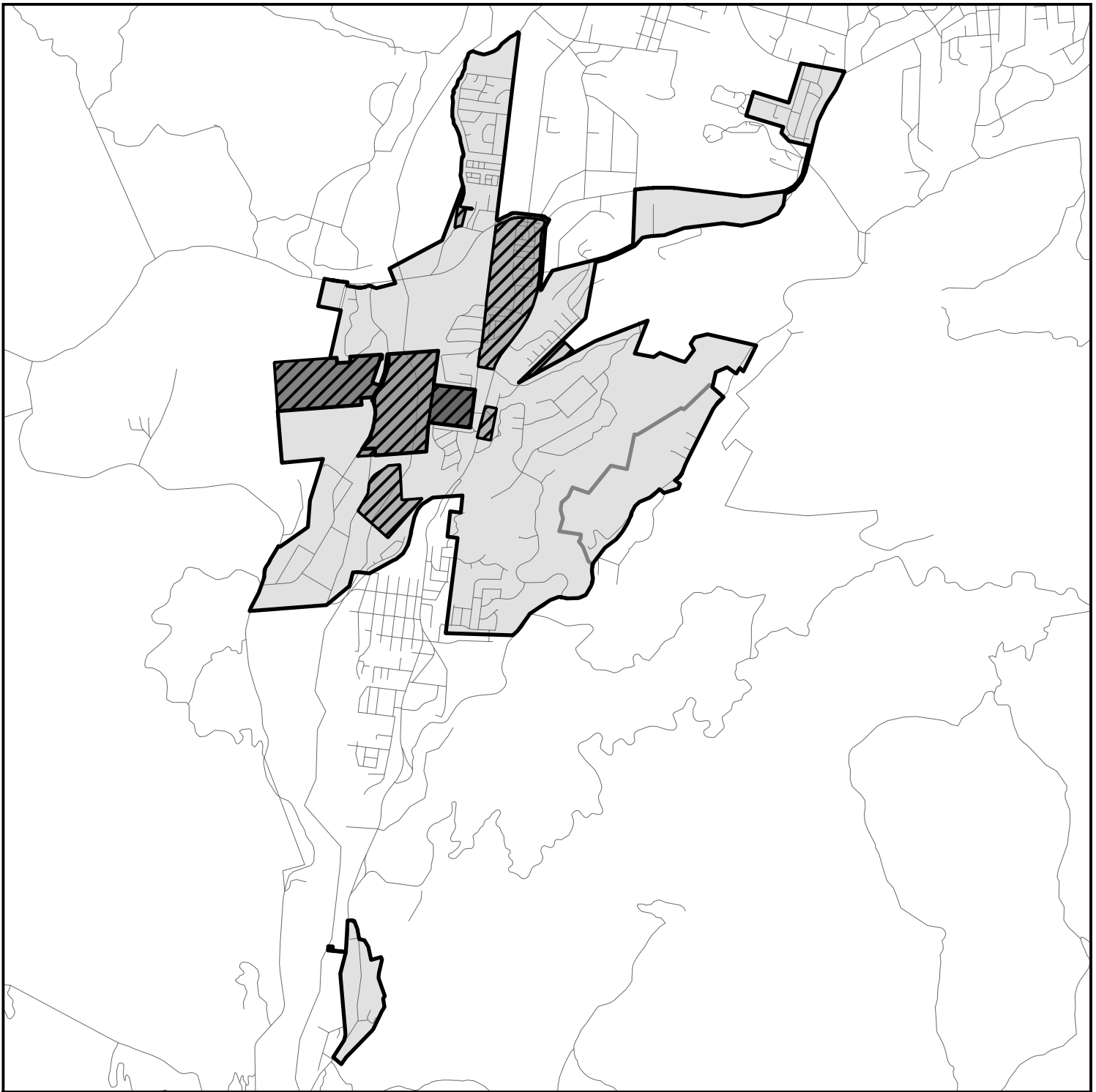
Figure IV.5

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**LEGEND**

	Ventura River County Water District Sphere
	Possible Sphere of Influence Change
	Ventura River County Water District
	New VRCWD Facility
	Areas Inside Sphere, Outside District, Served by Others
	Served by Others, Better Served by VRCWD
	Areas Outside District, Served by District
	Areas Outside Sphere, Outside District
	Special Study Areas

# Ventura LAFCO

## Ventura River County Water District

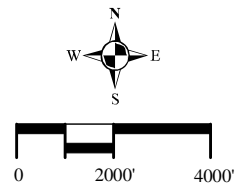


Figure IV.6

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Accurate as of 8/21/03



In the Ojai-San Buenaventura service review area, six of the eleven agencies (Casitas MWD, Ojai Basin GMA, Ojai Water CD, Saticoy SD, CSA #29 and CSA #32) had no special studies areas and updating the SOIs for these agencies should not require extensive analysis. While three other agencies—Meiners Oaks CWD, Montalvo MID and the Ventura River CWD—have special study areas identified, updating SOIs for these agencies is not expected to require extensive analysis. The special study areas for these three agencies include parcels where facilities are outside the existing agency boundaries or where future service may be needed. Two agencies, the City of San Buenaventura and the Ojai Valley SD, have special study areas or have SOI issues, which are discussed in subsequent paragraphs.

However, there are other issues, addressed in Section IV.9, Government Structure Options, which should be considered by LAFCO prior to updating any of the SOIs for the agencies in the Ojai-San Buenaventura service review area. In that section of this service review report, it is suggested that Ventura LAFCO either initiate a reorganization of water providers in the Ojai Valley or encourage the agencies to return to LAFCO with a reorganization proposal. While it is reasonable to allow the water agencies in the Ojai-San Buenaventura service review area adequate time to consider reorganizing, the schedule for updating the SOIs for Ventura County agencies may not permit an extensive period of time to examine all the potential government structure options. Therefore, it suggested that Ventura LAFCO consider adopting a policy for “zero” sphere of influence designations and consider applying that designation to the water providers in the Ojai-San Buenaventura service review area until a possible reorganization can be addressed. Annexations to an agency with a zero sphere might require more in-depth analysis or might be prohibited according to the policy developed.

It is also suggested that Ventura LAFCO consider a zero SOI for the Montalvo MID and Saticoy SD. The service provision issues for these agencies have also been addressed in Section IV.9, Government Structure Options.

**a) City of San Buenaventura**

The SOI for the City of San Buenaventura has discrepancies between the SOAR/HVPA lines and the SOI as determined by LAFCO. While it is possible that not all the territory designated by the City’s SOAR/HVPA should be included in the SOI, it is expected that updating the SOI will require a moderate level of time and effort on the part of the Ventura LAFCO staff. There are also some discrepancies between the parcel lines in the GIS systems of LAFCO and the City and, while reconciling the two systems may not be complex, it will also require additional effort.

**b) Ojai Valley SD**

The Ojai Valley SD has boundary and SOI issues, which will need more analysis by the Ventura LAFCO staff. The District was formed in May 1985 as a result of the consolidation of the Ventura Avenue, Oak View, and Meiners Oaks Sanitary Districts, and the Sanitation Department of the City of Ojai. The predecessor agencies were formed in the early 1960's in conjunction with construction of the Oak View Treatment Plant. During the reorganization of the four agencies a service area that included the Ojai Valley between ridgelines was opposed at LAFCO. As a result, the final agency and SOI boundaries were not always consistent with service provision.

A possible SOI has been suggested for the Ojai Valley SD as part of this service review. The suggested SOI includes areas which currently receive service from the District but which are

outside the agency boundaries and/or SOI or areas that have a potential to be developed consistent with existing SOAR and greenbelt lines. The suggested SOI primarily addresses three major areas, which are:

#### Creek Road

The District currently has a sewer line in Creek Road. The suggested SOI includes some areas, which currently receive wastewater service but are not within the SOI. Typically SOI lines follow property lines but some properties along Creek Road that currently receive sewer service are zoned either Agricultural Exclusive or Open Space. These land use designations limit the future demand for sewer service. For example, a portion of the winery/vineyard located along Creek Road currently receives sewer service but the remainder of the property, consisting of agricultural uses and hillsides, is not expected to need service in the future. The suggested SOI includes only that part of the winery/vineyard receiving service but does not follow the property line.

#### Western Area and Live Oaks Acres

In these areas properties currently receiving wastewater service or expected to need it within the next 10-15 years have been included in the suggested SOI. The Ojai Valley SD currently has sewer lines in the area.

#### Eastern Area

The District has a sewer line in Ojai Avenue that ends at St Joseph Hospital and in Grand Avenue that ends at Orange. While not currently receiving wastewater service, the areas might require sewer service within the next 10-15 years and should be considered for inclusion in the Ojai Valley's SOI.

### c) Other Cost Avoidance Opportunities

During the mapping, another potential opportunity for cost avoidance was noted which involved duplicate GIS systems. Many of the water and wastewater agencies, including Ventura County, have GIS systems. While beyond the scope of LAFCO's authority, Ventura County agencies should consider a closer coordination of all the GIS systems as a means of reducing costs. While it might be infeasible for one agency to maintain all GIS data, a designated agency for specific type of data might reduce costs.

Finally agencies answering the service review questionnaire reported well-established budget processes and procedures, which use internal cost/benefit studies to find and utilize opportunities to reduce or avoid costs. As part of the questionnaire, agencies were asked to note services that were currently provided by other agencies or private contractors, the estimated annual cost savings and excess capacity, facilities or staff that could be made available. Table IV.10, Summary-Use of Contractors, illustrates each agency's use of outside contractors.

TABLE IV.10  
SUMMARY – USE OF CONTRACTORS

	SERVICES PROVIDED BY PRIVATE CONTRACTORS	SERVICES PROVIDED BY OR TO OTHER AGENCIES	ESTIMATED ANNUAL COST SAVINGS	EXCESS CAPACITY, FACILITIES OR STAFF
Casitas MWD	Large capital improvement projects and environmental services	Agreement with Carpinteria WD to provide water	None Reported	None Reported
San Buenaventura	Engineering, environmental permitting, construction	1) JPA for CSA\$29 (North Coast) 2) JPA for McGrath State Beach Park	Not Calculated	None reported
Meiners Oaks CWD	None Reported	None Reported	None Reported	None Reported
Montalvo MID	None Reported	1) Operations, maintenance and other services provided by Ventura regional SD 2) Wastewater service to areas with the City of San Buenaventura	None Reported	None Reported
Ojai Basin GMA	None Reported	None Reported	None Reported	None Reported
Ojai Valley SD	Construction, audits and accounting	1) Insurance through California Sanitation Risk Management Authority 2) Laboratory, mechanical and source control on as-needed basis	Not Calculated	None reported
Ojai Water CD	None Reported	None Reported	None Reported	None Reported
Saticoy SD	None Reported	1) Administration, operations, and engineering provided by Ventura regional SD	Not Calculated	None reported
CSA #29	Construction	1) Ventura County self-insurance pool and other services service	Not Calculated	None reported
CSA #32	None Reported	1) Shares services and facilities with Ventura County	Not Calculated	None Reported
Ventura River CWD	Leak repair and other services as needed	1) Provides staff, equipment and materials to other agencies as needed	Not Calculated	None Reported

## IV.7 RATE RESTRUCTURING

The service review questionnaire asked agencies to list current rates for water and wastewater service, rates changes in the previous two years, anticipated rate changes and any difference in rates charged to customers outside agency boundaries. The Ojai Basin GMA reported a rate decrease of \$1.00 per AF. Three agencies (Meiners Oaks MWD, Montalvo MID and the Ojai Valley SD) did not report rate increases over the previous two years. The remaining agencies all reported rate increases ranging from 3% to approximately 10%. The Ventura River CWD, which has three water service zones, reported a “pass-through” rate increase of 3% only in Zone 3, which is served potable water by the Casitas MWD through agreement.

The agencies were also asked to list current rates in terms of acre-feet and million gallons per day (mgd), for water and wastewater respectively, in order to have a uniform basis of comparing rates from diverse agencies. No data has been included for either the Ojai Basin Groundwater

Management Agency or the Ojai Water Conservation District. The rates for the Ojai Basin Groundwater Management Agency are set at \$5.00 per AF of groundwater pumped and the Ojai Water Conservation District primarily relies on its share of property taxes as the agency's source of revenue. CSA #32, which permits on-site wastewater systems, has established a flat rate of \$285.00 per applicant.

Using acre-feet and mgd for water and wastewater service rates, respectively, did not yield useful information. Therefore, the database is being revised and other sources were used to compare rates.

The State Water Resources Control Board publishes a wastewater users survey report, which was used to develop, Table IV.11, Wastewater Agency Rates, and provide a comparison of the rates of the wastewater agencies in the Ojai-San Buenaventura service review area.<sup>8</sup>

Table IV.11  
Wastewater Agency Rates

AGENCY	MONTHLY USER CHARGE	CONNECTION FEE
San Buenaventura	\$23.67	\$1,738
Montalvo MID	\$13.00	\$625
Ojai Valley SD	\$26.43	Variable
Saticoy SD	\$16.00	\$800
CSA #29	\$77.44	\$1,700

Table IV.12, Water Rates, includes a partial comparison of rates per acre-foot as requested by the service review questionnaire. The Ventura River CWD has three separate zones of service and information has been included for each zone.

Table IV.12  
Water Rates (AF)

AGENCY	WATER PER AF
Casitas MWD	\$704
City of San Buenaventura	\$614
Meiners Oaks CWD	\$372
Ventura River CWD	Zone 1 \$559 Zone 2 \$596 Zone 3 \$665

Since the agencies differ in the billing period (monthly, bimonthly or quarterly), the unit of measurement used to calculate rates, the rate structure (flat or tiered rates), connection fees, the class of user (residential, agricultural and industrial/commercial), the database is being revised to reflect the variability among the agencies while still permitting a meaningful comparison of costs for the benefit of the public, the elected officials and the agencies. Table IV.13, Water Rate

Comparison, was developed using the revised format being considered by the Ventura LAFCO staff.

TABLE IV.13  
WATER RATE COMPARISON

	CASITAS MWD	CITY OF SAN BUENAVENTURA	MEINERS OAKS CWD	VENTURA RIVER CWD
1" Meter/Service Charge (residential)	\$12.42	\$17.11	\$8.00	Zone 1 \$18.12 Zone 2 \$21.72 Zone 3 \$21.72
Water Usage (residential/HCF)	\$1.07	\$1.41	\$0.80	Zone 1 \$0.84 Zone 2 \$0.93 Zone 3 \$1.08
1" Meter Connection Fee	\$6,207	\$1,645	None Reported	\$3,900 plus actual installation cost
Estimated Monthly Residential Water Bill*	\$39.46	\$79.11	\$43.20	Zone 1 \$41.02 Zone 2 \$43.92 Zone 3 \$49.73

\* Estimated water use for a family of five—one af/year; excludes irrigation use. Actual bills may vary depending on size of agency, land uses and other factors.

<sup>8</sup> State Water Resources Control Board "Wastewater User Survey Report, FY 2001-2002" May 2002.



## IV.8 OPPORTUNITIES FOR SHARED FACILITIES

As part of the service review questionnaire, agencies were asked to identify ways that they currently cooperate with other agencies to maximize opportunities for sharing facilities. Agencies were asked to list current joint activities with other agencies, which are shown in Table IV.14, Joint Service Agreements. Of the 11 agencies within the Ojai-San Buenaventura service review area, five either did not reference any joint activities or did not respond. The remaining agencies noted joint activities, which increase opportunities for shared facilities.

TABLE IV.14  
JOINT SERVICE AGREEMENTS

AGENCY	JOINT AGREEMENTS NOTED
Casitas MWD	Agreement with Carpinteria Valley WD for retail water service.
City of San Buenaventura	Joint Powers Agreements (JPA) for the CSA #29 (North Coast) and with the California State Department of Parks and Recreation for McGrath State Beach Park
Meiners Oaks CWD	None Reported
Montalvo MID	Agreements with the City of San Buenaventura for commercial uses located on Victoria Avenue
Ojai Basin GMA	Agreement to allow Southern California Water Company to export groundwater to Casitas MWD for temporary, alternative water supplies.
Ojai Valley SD	None reported
Ojai Water CD	None reported
Saticoy SD	None reported
CSA #29	Shared services and staff and insurance through Ventura County.
CSA #32	Some shared services and staff through the Ventura County Real Estate Services Division.
Ventura River CWD	Emergency sharing of facilities, staff and equipment as the need arise. Also the Ventura River CWD adapted existing software to be used as an electronic meter reading, which was subsequently used by the Meiners Oaks CWD.

The 1999-2000 Ventura Grand Jury report recommended that the Ventura County Clerk maintain a list of JPAs operating within Ventura County. The database designed by Ventura LAFCO has a list of JPAs reported by the water and wastewater agencies.

Other shared activities among the agencies in the service review area also are occurring, in particular with the on-going concerns regarding the Ventura River. The following agencies involved in the Ojai-San Buenaventura service review are cooperating in a Habitat Conservation Planning (HCP) process for the Ventura River watershed:

- ★ Casitas Municipal Water District
- ★ City of San Buenaventura
- ★ Meiners Oaks County Water District
- ★ Ojai Basin Ground Water Management Agency
- ★ Ojai Valley Sanitary District
- ★ Ventura River County Water District.

A significant opportunity for future shared facilities is in the expanded use of water reclamation in the Ojai Valley. The steelhead trout was listed as an endangered species under federal

statutes in 1998. Agencies involved in the protection plan agreed to build a fish ladder on the Robles Diversion dam in the Ventura River to help the trout spawn. As part of the agreement, the Casitas MWD is required to ensure a flow of water through the ladder. The Casitas MWD has argued that 800 AF per year is adequate; officials with resource agencies believe that 2,000 AF is needed. While the Casitas MWD has an overall safe yield of 21,500 AF, the diminishing supply and increasing cost of water is a significant concern to the District and its customers. The increased use of reclaimed water could be considered as source for the fish ladder.

Currently the Ojai Valley SD has a treatment plant located at the southerly end of its service area. It would be impractical to pump recycled water back to the point in the Ventura River where it is needed for the steelhead trout ladder or for other uses, such as golf courses in the City of Ojai. However, the Ojai Valley SD staff has informally noted two possible locations in the easterly portion of its service area where small “package” wastewater treatment plants might be located to provide recycled water as a means of increasing the overall water supply and possibly reducing costs.

There are obstacles to increasing water recycling. The Ojai Valley SD is currently meeting its wastewater demands and there is no current water quality, infrastructure or financial reason for the District to expend additional funds. Another obstacle is the requirement for CEQA review. The residents of the Ojai Valley are concerned with the preservation of the existing community character and quality of life in the region and land use agencies have adopted policies, procedures and regulations in support of that goal. Consequently, the potential for growth inducing impacts resulting from increased wastewater capacity might require environmental studies.

## **IV.9 GOVERNMENT STRUCTURE OPTIONS**

Functional reorganizations within agencies, amending or updating SOIs and other changes in the jurisdictional boundaries of the water and wastewater agencies were noted in Section VI.6, Cost Avoidance Opportunities. This section addresses efficiencies that might be gained through other governmental structure options.

The initial step in evaluating governmental structure options was a review of recommendations from the “Ventura LAFCO 2001 Special Districts Study. These recommendations are included in this service review report as information about potential government structure options considered by Ventura LAFCO as part of Special District Studies completed in 1972, 1985, 1993 and 2001. Table IV.15, 2001 Ventura LAFCO Special District’s Study, summarizes those recommendations. In the service review responses, none of the agencies reported having submitted or been included in a reorganization proposal before Ventura LAFCO within the previous two years.

TABLE IV.15  
2001 VENTURA LAFCO SPECIAL DISTRICT STUDY

AGENCY	RECOMMENDATIONS
Casitas MWD	1972 recommendation that the agency appoint a representative to a committee to study unification of retail water service in the Ventura River Valley; no recommendations from subsequent Special District Studies.
San Buenaventura	Not included in Ventura LAFCO Special Districts Studies.
Meiners Oaks CWD	1972 recommendation that the agency appoint a representative to a committee to study unification of retail water service in the Ventura River Valley; 2001 recommendation that the agency consider consolidating with Ventura River CWD or the Casitas MWD; no recommendations from other Special District Studies.
Montalvo MID	1972 recommendation that Montalvo MID, City of San Buenaventura and Ventura Regional SD study the feasibility of a reorganization; 2001 recommendation that a merger with the City of San Buenaventura be considered; no recommendations from other Special District Studies.
Ojai Basin GMA	None noted.
Ojai Valley SD	None noted regarding governmental structure options after successful consolidation of smaller wastewater agencies, forming current Ojai Valley SD, in 1985.
Ojai Water CD	1972 recommendation that the agency appoint a representative to a committee to study unification of retail water service in the Ventura River Valley; no recommendations from subsequent Special District Studies.
Saticoy SD	1972 recommendation that Montalvo MID, City of San Buenaventura and Ventura Regional SD study the feasibility of a reorganization; no recommendations from subsequent Special District Studies.
CSA #29	None noted.
CSA #32	None noted.
Ventura River CWD	1972 recommendation that the agency appoint a representative to a committee to study unification of retail water service in the Ventura River Valley. 2001 recommendation that the District consider consolidating with the Meiners Oaks CWD; no recommendations from other Special District Studies.

One of the purposes of the service review is to list all possible government structure options including advantages and disadvantages of potential reorganizations. For this purposes of this service review report, a reorganization is defined as two or more changes of organization (i.e., consolidation, merger, dissolution, annexation and/or detachment) which are initiated in a single proposal before LAFCO.

The various options for governmental restructuring in the Ojai-San Buenaventura service review area can be divided into two service areas—water provision in the Ojai Valley and wastewater provision in and near the City of San Buenaventura.

**a) Water Service in the Ojai Valley**

Water service in the Ojai Valley is provided by six public agencies as well as private and mutual water companies. In 1972 Ventura LAFCO recommended that the agencies involved form a committee to study the reorganization of public water purveyors in the region. Two of the agencies formally appointed representatives to such a committee, however there are no records of any further action or of any activities of the proposed committee. It is suggested that the Ventura LAFCO Commission reconsider the reorganization of water providers in the Ojai Valley.

There are three ways that proposals for the reorganization of special districts can be legally submitted to LAFCO—by petition of the landowner/voters (Government Code §56864-56871), by resolution of an affected agency (Government Code §56654) or by the LAFCO Commission (Government Code §56375). Since there has been little evidence of widespread dissatisfaction among the citizens of the Ojai Valley with current public agency water service providers, it is not expected that either landowners or by registered voters would submit a petition to reorganize public agency water purveyors. Similarly, since 1972 there has apparently been little effort among the water agencies to study the issue and it is again doubtful that the one of the affected agencies would initiate a reorganization.

However, LAFCO can initiate proposals for the consolidation, dissolution, merger or reorganization of special districts if it is consistent with a study or the conclusions of a service review report. It is suggested that Ventura LAFCO consider initiating a proposal to reorganize the water agencies in the Ojai Valley. The benefits that might result from a reorganization include: more logical local government boundaries; simpler water service provision for citizens; increased economies of scale; lower rates; more regional coordination of water service, elimination of some duplicative efforts; and increased efficiencies. The disadvantages primarily include the additional expense in time and resources from all the affected agencies.

The Cortese-Knox-Hertzberg Act also allows the LAFCO Commission (Government Code §56826 et seq) to refer a reorganization proposal, including one initiated by the LAFCO Commission, to a reorganization committee. It is also suggested that the Ventura LAFCO Commission form a reorganization committee comprised of representatives from each of the affected agencies governing body as well as representatives from other entities as the Commission deems appropriate. By having governing body representatives on the reorganization committee, it is sometimes possible to reduce the effort required of staff.

As an alternative, it is also possible for the water agencies in the Ojai Valley to form a reorganization committee and present a report to the Ventura LAFCO Commission. This could achieve the same benefits as a reorganization proposal initiated by LAFCO and might have the additional benefit of having more support from the affected agencies. However, the lack of any serious effort toward reorganization during the previous 30 years is also a future obstacle.

Some of the possible governmental structure options that might be considered as part of a reorganization of water providers are listed below. Not all the possible government structure options have been included in the following discussion. For example, private and mutual water companies also serve the Ojai Valley area and a thorough analysis of the water service should include them, in particular those that may have problems with infrastructure or service provision. In addition, representatives from the City of Ojai and the Ojai Valley SD should be included in a discussion of the water service provision to ensure that their concerns and issues can also be addressed; however, it is not suggested that either agency be included in any possible governmental structure options.

#### **Meiners Oaks County Water District/ Ventura River County Water District**

The Meiners Oaks CWD operates a retail water system for 1,263 customers with an estimated population in its service area of approximately 4,000 people. The agency's only source of water is from four wells although it has an agreement for emergency water services with the Casitas MWD. The agency has 3.5 employees and their budget in FY 2002-2003 was approximately \$520,000 with 74% of the total revenue coming from service charges and nearly 15% from property taxes and from interest.

The Ventura River CWD operates a retail water system for 2,107 customers with an estimated population of 6,000. The agency's source of water is also from four wells although it also has an agreement with the Casitas MWD for purchase of water when drought reduces the ability of the agency's wells to meet demand. The agency has four employees and their budget in 2002-2003 was approximately \$900,000 with 97% of the total revenue derived from service charges. The agency has a five-year CIP and has approximately 2.5 days in storage capacity.

Both agencies' service areas are adjacent and both have developed independent and occasionally duplicative facilities. For example, the boundary between the two agencies is in the centerline of Rice Road and each agency has a pipeline along one side of Rice Road. There are no inter-ties between the two systems although the agencies do share material and staff on an emergency basis.

One government structure option is the consolidation of the Meiners Oaks CWD with the Ventura River CWD. If consolidated, one advantage is the relative ease of consolidating two agencies formed under the same enabling legislation. The consolidation could also pool resources, manpower, facilities and technology and could streamline the provision of service for both agencies. The Meiners Oaks CWD also has an unused well facility in close proximity to the Ventura River CWD's facilities. The water from this facility could be blended with Ventura River CWD water to bring it into compliance with water quality standards and then could be used throughout both systems. A reorganization could reduce costs and duplicative facilities, simplify the local governmental structure and allow a larger agency to reach greater economies of scale.

One disadvantage is the potential reluctance of the residents in the Meiners Oaks CWD service area. The citizens served by the Meiners Oaks CWD participate in the activities of the agency and seek to preserve a sense of community. While community based organizations are important and necessary, the issue of whether a small organization can provide water service most efficiently and participate in regional water service issues should be discussed.

#### **Ojai Basin Groundwater Management Agency/Ojai Water Conservation District**

The Ojai Basin Groundwater Management Agency was formed by legislation signed by the governor in 1991 before the Ojai Valley developed any specific groundwater problems. It was formed to preserve the quantity and quality of groundwater in the Ojai Basin and to protect and maintain the long-term water supply for all the water users in the Basin. Its service area includes the City of Ojai and the east end of the Ojai Valley. Four agencies (City of Ojai, the Casitas MWD, the Ojai Water Conservation District and the Southern California Water Company) each appoint one Board member and the fifth is chosen from the governing bodies of the Senior Canyon, Siete Robles or Hermitage Mutual Water Companies. The agency's budget in 2002-2003 was approximately \$30,000.

The Ojai Water Conservation District is authorized to monitor the use of groundwater, acquire water rights, store/spread water, and construct dams or other water facilities. The agency's 2002-2003 budget was approximately \$5,000 with 75% of the revenue derived from property taxes. The Ojai Water Conservation Districts' service area overlaps that of the Ojai Basin Groundwater Management Agency.

The advantages of reorganizing the two agencies include the elimination of apparently duplicative services, the possibility for reduction in costs and the simplification of local governmental boundaries.

The most logical governmental structure option would seem to be the dissolution of the Ojai Water Conservation District with the Ojai Basin Groundwater Management Agency being named the successor agency. The primary disadvantage would be the legal complexity of the reorganization due to the structure of the Ojai Basin Groundwater Management Agency.

The California Legislature enacted statutes establishing several groundwater management agencies across the State in order to enact local ordinances to regulate the amount and place of use of groundwater. The legislature enacted the statutes since it is not authorized by the California State Water Code to manage groundwater. While California landowners have a correlative right to extract as much groundwater as they can beneficially use, in some basins the right to the water has been defined by a court. Since the Ojai Basin GMA was formed by the legislature and its mission involves complex water rights issues, it may be infeasible to dissolve the District. Two other potential methods of reorganizing the Ojai Basin GMA may also be available—either Water Code Section 10750 et seq, which allows certain existing local agencies to manage groundwater, or through city and county ordinances. The legal issues associated with this governmental structure option would need to be researched.

#### Other Government Structure Options

While not explored in this section of the Ojai-San Buenaventura service review report, other combinations of government structure options are possible although considered less likely to succeed. The four agencies mentioned in preceding paragraphs could be reorganized as one agency, all the water agencies in the Ojai Valley (including the Casitas MWD) could be reorganized as a single agency, private and mutuals companies could be included or the City of Ojai could assume responsibility for some service. These government structure options were considered less likely to be implemented or beyond the purview of LAFCO and are not addressed. In addition several agencies noted that a reorganization that involved all the water agencies in the Ojai Valley would require significant analysis, review and effort and might not be cost-effective.

#### **b) Wastewater Service—The City of San Buenaventura/Montalvo Municipal Improvement District/Saticoy Sanitary District**

As with the water agencies in the Ojai Valley, the option for some type of reorganization between the City of San Buenaventura, the Montalvo MID and the Saticoy SD was recommended during the 1972 Ventura LAFCO Special District Study. The 1985 and 1993 Special District Studies did not include recommendations for a reorganization. The 2001 Special Districts Study did recommend that the Montalvo MID consider merging with the City.

Services issues between the two agencies have become multifaceted. The Montalvo MID was formed in 1955 to provide wastewater service to unincorporated areas. As the City of San Buenaventura grew and annexed territory, the District's service area grew smaller and its

financial health was jeopardized. With LAFCO acting as a mediator, an agreement to determine respective service areas was adopted by both the City and the District. That agreement, however, should be revisited since its usefulness was undermined by a dispute between the two agencies over pavement repair. The District also had a separate agreement with the City regarding wastewater provision to an automotive center which was served more efficiently by the District. Generally, the areas south of Highway 101 are served wastewater by the District.

As an example of the complexity of service provision issues, recently there were complaints about odors in the vicinity of the Montalvo's treatment plant. The Cities of San Buenaventura and Oxnard as well as the Montalvo MID and the Ventura Regional Sanitation District have facilities or provide service in the area. Both Cities were contacted and both Cities, in turn, contacted the Montalvo MID. The Montalvo MID used a consulting firm to study the source of odors which were eventually traced back to a pump station that was managed by the Ventura Regional Sanitation District.

Boundary issues are also complicated. Currently, a majority of the District is within the city; the remainder remains unincorporated. The Montalvo MID treatment plant is located within the 100-year flood plain as designated by Federal Emergency Management Agency (FEMA). While the treatment plant has some flood protection, it is unclear if the level of flood protection is consistent with current standards of the Army Corps of Engineers or other regulatory agencies.

The City's SOAR/HVPA also restricts the City's ability to extend services to certain types of land uses; if these areas have failing septic systems and need sewer service, the District may be the most efficient agency to serve them. As a result of the location of the treatment plant, land uses/service extensions, the SOAR/HVPA lines, there are underlying land use conflicts between the Montalvo MID and the City of San Buenaventura.

The service and boundary issues between the City and the Saticoy SD are similar if only slightly less complicated. The Saticoy SD is within the City of San Buenaventura's SOI although it is not an island as defined by the Cortese-Knox-Hetzberg Act. The Saticoy SD recently received several grants from the United States Department of Agricultural and the California Clean Water Program to upgrade the plant. The Saticoy SD service area does include some sections of lower income residents and any reorganization proposal would have to also address environmental justice issues.

The Saticoy SD is now working with the Cities of San Buenaventura and Oxnard on a wastewater reclamation project. The joint effort would treat 0.8 mgd of wastewater from the City of San Buenaventura at the Saticoy treatment plant and recharge the recycled water into the Oxnard Forebay. The current treatment plant capacity is 0.25mgd. The increase in capacity and in the collection/distribution system is expected to cost between \$6 and \$8 million. Since a majority of the area east and north of the current Saticoy SD service area could be sewered through gravity lines, the Saticoy treatment plant may help to reduce the City's costs.

Analyzed solely from a viewpoint of logical governmental boundaries and the orderly development of local governmental agencies, both the Montalvo MID and the Saticoy SD should be dissolved and the City named as the successor agency. However, as shown in the preceding discussion, the service and boundary issues are complicated. It has been proposed in other sections of this report to consider a zero SOI designation for both the Montalvo MID and the Saticoy SD, it is also suggested that the three agencies work together to develop a plan for future service.

## IV.10 EVALUATION OF MANAGEMENT EFFICIENCIES

Reviewing management efficiencies has generally been an internal function of a public agency with limited oversight by external entities such as some state and federal regulatory agencies or a Grand Jury. The OPR service review guidelines suggested factors that could be used when evaluating management efficiencies, but many of them relate to internal practices which are difficult to measure and whose correction is outside the purview of LAFCO authority. Some of the factors the OPR Guidelines recommend for evaluating management efficiencies have been addressed in other sections of this report. The Ventura LAFCO questionnaire included questions about master plans, recent litigation and/or Grand Jury inquiries and number of employees as a means of evaluating management efficiencies.

The presence of master plans, as described in Section VI.4, Infrastructure, can be viewed as indicative of managerial efficiency in long range planning. However, it should be noted that some small agencies and agencies which are close to built-out may use other means of predicting and preparing for long-term service needs such as a CIP.

Frequent litigation or inclusion in a Grand Jury report can also be used as a proxy measure for managerial efficiency. If an agency is frequently involved in litigation, it can indicate that the staff and/or Board resort to the courts for resolution of issues which might be addressed through other less expensive means. Occasionally inclusion in a Grand Jury investigation might mean that complaints about the administration have been received.

Of the eleven agencies within the Ojai-San Buenaventura service review area only one, the Ojai Basin Groundwater Management Agency, noted being the subject of a 1999-2000 Ventura County Grand Jury investigation. The Grand Jury, however, only included basic information about the agency and did not include it in its analysis. One agency, the Ventura River CWD, noted that it had been involved in litigation within the previous two years. The litigation involved the an inverse condemnation suit and did not involve service provision.

Agencies were also asked to report the number and categories of employees dedicated to the provision of service. In the same 1999-2000 Grand Jury report, "An Examination of Special Districts Providing Water Service to Ventura County" the Grand Jury used an agency's administrative expense as a percentage of the operating revenue for the district. The Grand Jury's report noted that:

*"Most districts enjoy administrative overhead percentages of less than 15%....dependent districts enjoy low overhead through their sharing of management, facilities and staff. Smaller, independent districts, however, pay the largest overhead penalty."*

The service review questionnaire did not specifically request that agencies provide data on administrative overhead percentages although it is suggested that future service reviews collecting this data as a means of analyzing management efficiency. If future service reviews continue to require an assessment of management efficiencies, Ventura LAFCO might also consider developing performance measures or benchmarks to allow for a meaningful comparison of management practices and efficiencies among diverse agencies.

As another means of assessing managerial efficiencies, Table IV.16, Employee Information, provides the number of administrative, professional/support and operational employees and the ratio of the number of professional/support/operational employees to administrative staff. For the agencies reporting the ratio of administrative staff to professional/operational were similar.



The Montalvo MID and the Saticoy SD both use contract staff, primarily from the Ventura Regional Sanitation District, to operate the agencies. Neither agency has employees but both provided direct services to customers. The Ojai Basin Groundwater Management Agency has three part-time employees and the Ojai Water CD has one part-time employee; neither agency provides direct service to customers.

The City of San Buenaventura did not report any executive/management staff, but did report that in FY 2002-2003 a total of \$2,069,382 (\$1,218,689 for water and \$850,693 for wastewater) was transferred to the City General Fund. Typically municipalities transfer a portion of enterprise funds to the General Fund to cover administrative expenses. This can be significant since Prop 218 and subsequent legal opinions discouraged the transfer of enterprise funds to the general fund unless there is a clear nexus between the transfer and the cost of services. Most public agencies have completed these nexus studies.

TABLE IV.16  
EMPLOYEE INFORMATION

	RATIO OF EXECUTIVE STAFF TO PROF. AND OPER.	WATER			WASTEWATER		
		EXECUTIVE AND MGT.	PROF. AND SUPPORT.	OPERATIONAL	EXECUTIVE AND MNGT.	PROF. AND SUPPORT.	OPERATIONAL
Casitas MWD	1:20	1	10	26**			
San Buenaventura	See Discussion	None Reported	5.5	45	None Reported	3.5	41
Meiners Oaks CWD	1:2.5	1	1.5	1			
Montalvo MID	See Discussion				None Reported	None Reported	None Reported
Ojai Basin GMA	1:2 See Discussion	1*	2*	0			
Ojai Valley SD	1:5				3	4	12
Ojai Water CD	1 See Discussion	1	0	0			
Saticoy SD	See Discussion				None Reported	None Reported	None Reported
CSA #29	1:4				6	18	7
CSA #32	1:5				1	4.5	0
Ventura River CWD	1:3	1	1	2			

\* All employees of the Ojai Basin GMA are part-time.

\*\* Five employees of the 26 positions are assigned to recreational services. The Casitas MWD also has approximately 45 part-time, summer employees associated with recreational services.

No significant inefficiencies in management were noted among the agencies

## **IV.11 LOCAL ACCOUNTABILITY AND GOVERNANCE**

No significant issues regarding local accountability and governance were noted for any of the agencies within the Ojai-San Buenaventura service review area. The governing boards of the agencies appear to be locally accountable through adherence to applicable government code sections, open and accessible meetings, dissemination of information and encouragement of participation in their election process. Some agencies did not fully complete the service review questionnaire and evaluating their local accountability was difficult.

Only three of the agencies (Casitas MWD, Ojai Valley SD and the City of San Buenaventura) have websites and provide copies of their budget on their website; the two dependent agencies (CSA#29 and #32) use the Ventura County website. It is suggested that the remaining agencies develop websites to increase dissemination of information, compliance with environmental justice issues and accountability to customers. The eight agencies that did not note the presence of websites did note that copies of the budget are made available to the public. All agencies reported unqualified audits in 2002.

The service review questionnaire asked each agency to provide current information about the governing board, the expiration date of each member's term and whether any recently elected governing board members ran unopposed. This information was entered into the database and will be used to maintain current and accurate information. Data about compensation, review sessions of the Brown Act/FPPC requirements and violations of either regulation within the previous two years was collected.

In addition, agencies were asked to indicate if the governing body was elected or appointed, whether recently elected officials ran unopposed and to provide the amount of compensation set for elected officials. Only two agencies, the Ojai Basin Groundwater Management Agency and the Ojai Water Conservation District, have Board members that are appointed. Four agencies reported that some board members ran unopposed.

A majority of the agencies reported that regular review sessions of the requirements of the Brown Act, FPPC and public disclosure laws were scheduled; a few agencies noted that sessions were scheduled on an as-needed basis. None of the agencies noted any violations within the previous two years.

Public access was evaluated by regularly scheduled meetings and locations, by compliance with ADA and by the use of legally required notices. All agencies reported that their meeting locations were in compliance with the requirements of ADA and listed the legally required means of giving notice of meetings.

The final OPR Service Review Guidelines suggested that to satisfy environmental justice concerns agencies hold meetings at a time and place that maximize public participation. A majority of the agencies within the Ojai-San Buenaventura service review area hold meetings after normal working hours. Three agencies (Ojai Water Conservation District, CSA #29 and CSA#32) do not have regularly scheduled meetings. The Casitas MWD holds regularly scheduled meetings at 3:00 pm.

Compensation of elected and appointed officials reported is shown in Table IV.17, Compensation for Elected Officials:

TABLE IV.17  
COMPENSATION FOR ELECTED OFFICIALS

	BASIC STIPEND	LIMIT ON STIPEND	BENEFITS	OTHER
Casitas MWD	\$171/mtg	\$1,710/month (ten mtgs)	Medical, dental and retirement	Actual costs and \$0.36 per mile
San Buenaventura	\$700 (mayor)/month \$600 (council)/month	\$700 (mayor)/month \$600 (council)/month	0	\$40/day meals and \$0.36 per mile; maximum \$300 (mayor)/month and \$200 (council)/month
Meiners Oaks CWD	\$150/mtg.	None Reported	None Reported	None Reported
Montalvo MID	\$150/mtg and \$30/hr for assigned mtgs	\$900/month	Workers Compensation and retirement	NA
Ojai Basin GMA	0	0	0	0
Ojai Valley SD	\$100/mtg	\$600/month	0	\$43/day meals and \$0.36 per mile
Ojai Water CD	0	0	0	0
Saticoy SD	\$80/mtg	None Reported	Workers Compensation and Social Security	None Reported
CSA #29*	\$7,083	*	*	*
CSA #32*	\$7,083	*	*	*
Ventura River CWD	\$100/day	\$1,000/month	0	President \$100/travel maximum Board \$50/month travel maximum

\*Total compensation for Board of Supervisors; no additional compensation for acting as governing body of dependent district

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## V. SANTA CLARA RIVER WATERSHED

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### V.1 SANTA CLARA RIVER EXECUTIVE SUMMARY

Municipal service reviews are a new requirement for LAFCOs and were intended to promote more efficient services, to identify areas of improvement and to assess service provision in relation to boundaries and spheres of influence (SOI). Service reviews do not directly change the provision of service but are sources of comprehensive information LAFCO can use in future actions.

LAFCO must conduct service reviews prior to or in conjunction with the mandated five-year schedule for updating SOIs. The service review report must include an analysis of the issues and written determinations for each of the following:

- Infrastructure needs or deficiencies;
- Growth and population projections for the affected area;
- Financing constraints and opportunities;
- Cost avoidance opportunities;
- Opportunities for rate restructuring;
- Opportunities for shared facilities;
- Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers;
- Evaluation of management efficiencies; and
- Local accountability and governance.

The service review process for the water and wastewater agencies in Ventura County started in January of 2003 and will be completed in December of 2003. It began with a meeting of the agencies to discuss issues and to receive input on a three-part draft questionnaire. The questionnaire, which was sent to all 36 agencies, requested data on quantitative, qualitative and boundary issues. All the agencies were contacted individually and approximately 80 hours of interviews with staff and board members were conducted.

To ensure more focused analysis on service issues, Ventura County was divided into three sub-regional areas, which were roughly based on watershed boundaries. The three sub-regional service review areas are the Calleguas Creek, Santa Clara and Ventura River (Ojai-San Buenaventura) areas. Each of the 36 agencies was placed in only one subregional area although service issues might overlap. This service review report addresses the agencies located within the Santa Clara River watershed and includes the following ten agencies:

- City of Fillmore
- City of Oxnard
- City of Port Hueneme
- City of Santa Paula
- Channel Islands Beach Community Services District
- Fox Canyon Groundwater Management Agency
- Ocean View Municipal Water District
- United Water Conservation District
- Ventura County Service Area No. 30
- Ventura County Waterworks District No 16

A database was designed and each agency's response to the questionnaire was entered into it. The database, which currently has approximately 15,000 entries, will be used for subsequent

service reviews, sphere of influence studies and other Ventura LAFCO studies and analysis. The database can be changed and modified as the need and use for information becomes more focused.

The mapping information submitted by the agencies identified areas inconsistent with adopted CURBs, outside each agency's boundaries where service was currently being provided, areas of overlap with other agencies and any illogical service boundaries. These areas were mapped and have been labeled as "special study areas" for use in subsequent sphere of influence studies. Service issues and associated improvements identified during the process are addressed in more detail in the body of this report and are briefly summarized in the following paragraphs.

Planning for future demand for service is hampered, particularly for smaller agencies and for special districts, by the lack of a consistent source and methodology of projecting population. Agencies such as SCAG and Ventura County should be encouraged to prepare population projections for special district boundaries as well as for municipalities. It may also be possible for agencies to avoid some costs by examining if there is an unnecessary duplication of GIS systems. This has been noted in all three service review reports.

One issue related to infrastructure needs and deficiencies is the need for easily obtainable information about the rates, capacity and service information for private/mutual water purveyors. Having a readily available source for this type of information would help to ensure more comprehensive water planning in Ventura County.

Another related issue is the presence of private wells. In Ventura County there are approximately 9,000 wells with approximately 3,500 active, 3,800 inactive and 2,000 abandoned ones. Not all of the active wells are metered and it is estimated that there may be as many as 400-500 unregistered wells operating in Ventura County. Planning for Ventura County's future infrastructure needs and deficiencies must include appropriate data about wells. It is suggested that the Ventura LAFCO database be expanded to include information regarding wells in order to more accurately assess present and probable water supplies.

Until more definitive plans for increasing the capacity of the existing wastewater facilities or constructing a new wastewater facility are known, the Cities of Fillmore and Santa Paula face a significant issue of infrastructure deficiency and financing constraints.

In terms of financing constraints, the Fox Canyon GMA is limited to charging a fee of \$3.00 per acre-foot of ground water pumped from wells within their boundaries. Since pumping fees are the sole source of income for the Fox Canyon GMA, rising annual costs may, at some point in the near future, exceed income.

The United Water CD noted that the cost of unfunded mandates for improving water quality, the need to replace infrastructure and the State's shifting of property tax from local agencies to the State makes the District's efforts to balance rates and achieve its objectives increasingly difficult. This concern was echoed by other agencies.

Finally, the Cities of Fillmore, Oxnard and Santa Paula as well as CSA #30 and Waterworks District #16 have a customer base that includes lower income residents and environmental justice concerns must be addressed when rates are set. All of these agencies struggle with financing constraints. No other financing opportunities and constraints were noted.

Establishing efficient boundaries can maximize cost avoidance opportunities. Special study areas for several agencies within the Santa Clara River watershed service review area have been mapped to make subsequent planning by Ventura LAFCO and other agencies more efficient. Several agencies have no issues with their boundaries or SOIs and updating their spheres is expected to require less analysis. It is suggested that Ventura LAFCO adopt a “zero” sphere policy and apply that designation to the Channel Islands Beach CSD.

The only government structure option noted during the Santa Clara River watershed service review was the potential reorganization of the Ocean View MWD.

No significant issues in management efficiency, local accountability and governance, shared facilities and rate restructuring were noted.

## V.2 PUBLIC AGENCY PROFILES

### a) Subregional Areas and Agencies

Of the ten public agencies in the Santa Clara River watershed service review area, six provide both water and wastewater, one agency provides wastewater services only and three agencies only provide water service. Each agency’s services and service area are described below. Exhibit V.1, Santa Clara River Watershed Service Review Agencies, shows the services each agency provides in a table.

#### Santa Clara River Watershed Service Review Area

- **City of Fillmore**

*The City of Fillmore provides comprehensive municipal services including water, wastewater, and a full range of other city services.*

- **City of Oxnard**

*The City of Oxnard provides comprehensive municipal services to residents including water, wastewater and a full range of other city services.*

- **City of Port Hueneme**

*The City of Port Hueneme provides comprehensive municipal services including water and wastewater services and a full range of other city services.*

- **City of Santa Paula**

*The City of Santa Paula provides comprehensive municipal services to residents including water and wastewater and a full range of other city services.*

- **Channel Islands Community Services District**

*The Channel Islands CSD provides water, sewer, trash/recycling and other community services.*

- **Fox Canyon Groundwater Management Agency**

*The Fox Canyon Groundwater Management Agency monitors the quality and quantity of groundwater in the Fox Canyon aquifer. The agency does not provide direct water service.*

- **Ocean View Municipal Water District**

*The Ocean View MWD provides agricultural water service to 50 customers along Hueneme Road.*

- **United Water Conservation District**

*The United WCD provides water conservation of both surface and groundwater resources, groundwater replenishment, wholesale water delivery and recreational services at Lake Piru.*

- **Ventura County Service Area #30**

*Ventura County Service Area #30 (CSA #30) provides sanitation services to the unincorporated community of Nyeland Acres. The Ventura County Board of Supervisors is the governing body of the agency.*

- **Ventura County Waterworks District #16**

*Ventura County Waterworks District Service Area #16 provides potable water and sanitation services to the unincorporated community of Piru. The Ventura County Board of Supervisors is the governing body of the agency*

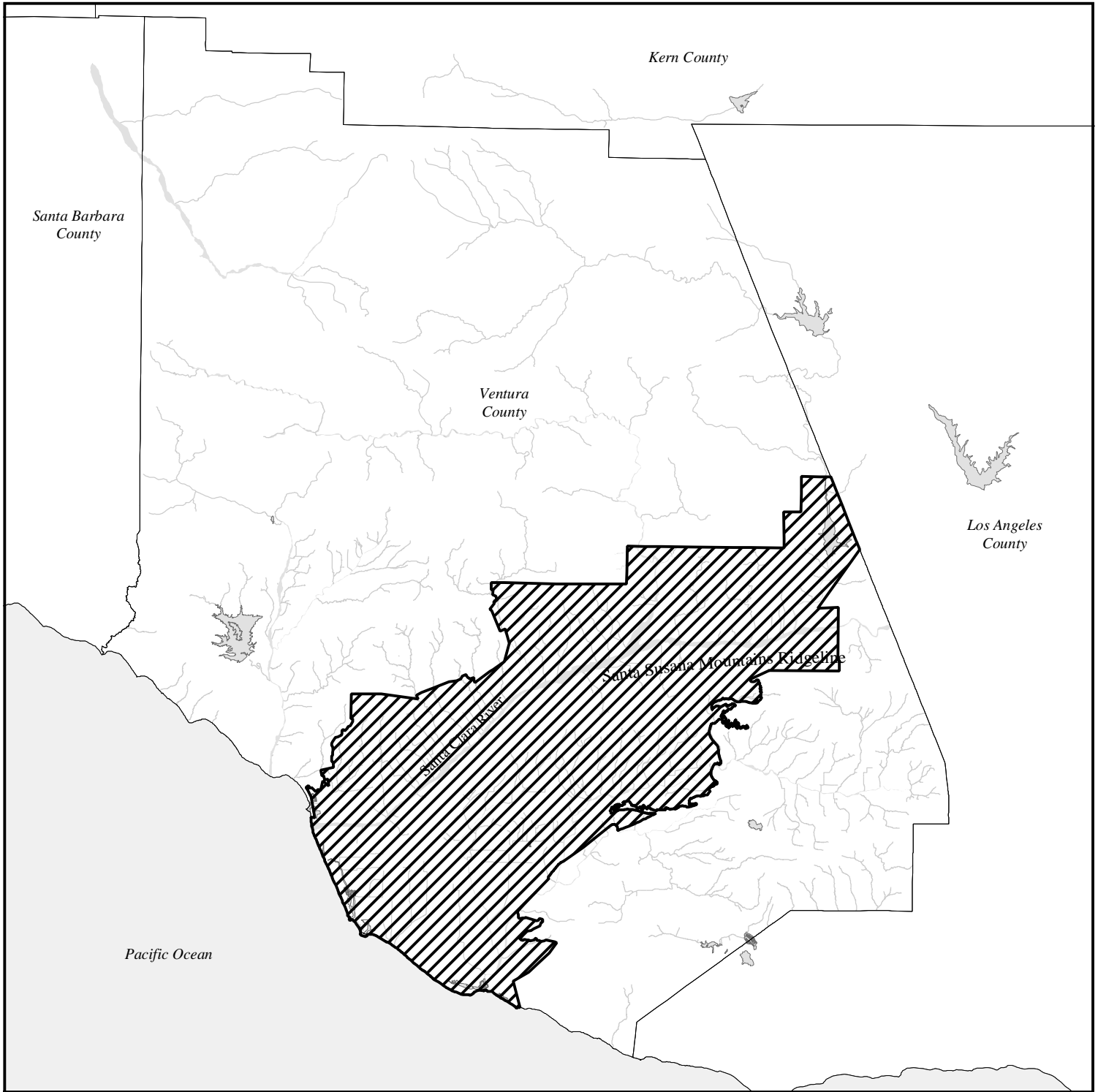
Figure V.1, Santa Clara Watershed Service Review Area, shows the regional location and general boundaries of the service review area addressed in this report.




**Exhibit V.1  
Santa Clara River Watershed Service Review Agencies**

Santa Clara River Watershed Agencies	WATER SERVICES											
	Retail Domestic Potable Water	Wholesale Water	Water Treatment	Recycled-Reclaimed Water	Agricultural Water	Groundwater Management	Water Replenishment	Water Conservation	WASTEWATER SERVICES	Sanitary Sewer Collection	Sanitary Sewer Treatment	Septic System Monitoring & Maintenance
City of Fillmore	X	D		D				D	X	D	D	
City of Oxnard	X	D		D		D		D	X	D	D	
City of Port Hueneme	X	D	C	C	C			D	X	D	C	
City of Santa Paula	X	D		D			D	D	X	D	C	
Channel Islands Beach Community Services District	X	D		C	D		D		X	D	C	
Fox Canyon Groundwater Management Agency	X						D					
Ocean View Municipal Water District	X	D										
United Water Conservation District	X		D	D		D	D	D				
Ventura County Service Area No. 30									X	D	D	
Ventura County Waterworks District No. 16	X	D							X	D	D	

**Services Provided = X (D=Direct and C=Contracted)**



**LEGEND**

 Ojai/Santa Clara Watershed Service Review Area

## Ventura LAFCO Santa Clara Watershed Service Review Area

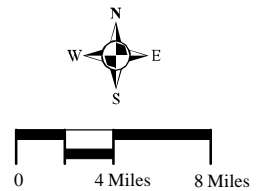


Figure V.1

Copyright 2002 by County of Ventura. Design, maps, index and text of this map are copyrighted. It is unlawful to copy or reproduce, either in digital or paper form, any part thereof for personal use or resale.

Warning: This map was created by the Ventura County Computer Aided Mapping System (CAMS), which is designed and operated solely for the convenience of the County and related public agencies. The County does not warrant the accuracy of this map and no decision involving a risk of economic loss or physical injury should be made in relation thereon.

Accurate as of 7/28/03

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### V.3 GROWTH AND POPULATION

With 1,864 square miles, Ventura County is in the median range for size among California's 58 counties, but ranks 11th in population with a Census 2000 count of 753,000. Using data from the Ventura Council of Governments (VCOG), the following table (Table V.1, Santa Clara River watershed Service Review Area Population Projections) has been developed:

TABLE V.1 SANTA CLARA RIVER WATERSHED  
SERVICE REVIEW AREA POPULATION PROJECTIONS

	FORECAST 2005	FORECAST 2010	FORECAST 2015	FORECAST 2020	FORECAST 2025
Population	251,784	265,510	281,991	298,364	317,525
Dwelling Units (DU)	76,225	81,180	87,229	93,583	100,086
<b>Countywide Total</b>	<b>796,387</b>	<b>836,186</b>	<b>874,881</b>	<b>915,005</b>	<b>951,080</b>
<b>DOF Totals for Ventura County</b>	<b>818,600</b>	<b>877,400</b>	<b>934,000</b>	<b>1,007,200</b>	

Since the boundaries of the service review area are the boundaries and SOI of the water and wastewater agencies, the projected population growth in Table V.1 is approximately 10% higher than both the Countywide totals and the DOF projections. Most population projections prepared by regional agencies are not segregated by the service areas of special districts.

The difference in projected population figures among agencies has been cited in other reports. For example, the City of Oxnard's January 2003 "Water System Master Plan" (Kennedy/Jenks Consultants) noted that, based on Census data, the City of Oxnard's population grew by 20% in the 1990s. However, the City of Oxnard's Planning Department, using data from the DOF, showed a population growth during most of the 1990s as approximately 6%. The difference in assessing past growth and projecting future increases in the City of Oxnard is used to illustrate the point made in previous service review reports that a consistent source and methodology of projecting population is needed.

Agencies included in the service review were asked to provide the estimated population as of 1/2003 for their existing service area. The data is summarized in Table V.2, Agency Projections of Current Population. Agencies that either did not answer the question or did not know the population of their agency are entered as "None Reported". Accurate population projections are critical for predicting future service demands and the lack of a generally accepted, consistent source and methodology for projecting future growth and population projections is as important of an issue in the Santa Clara River watershed service review area as has been noted in the previous water and wastewater service review reports.

Agencies were asked “How does your agency determine the projected growth within its current boundaries including sphere of influence?” in the service review questionnaire. The sources consistently cited were the General Plans of the four cities (Fillmore, Oxnard, Port Hueneme and Santa Paula) and from SCAG, Ventura County or the DOF. The figures have not been totaled since both the Fox Canyon GMA and the United Water CD service areas include portions of the two previous service review reports.

TABLE V.2 AGENCY  
 PROJECTIONS OF CURRENT  
 POPULATION

AGENCY	ESTIMATED POPULATION 1/2003
City of Fillmore	13,643
City of Oxnard	160,035
City of Port Hueneme	21,868
City of Santa Paula	29,100
Channel Islands Beach CSD	5,973
Fox Canyon GMA	310,000
Ocean View MWD	10,000
United Water CD	310,000
CSA #30	1,652
Waterworks District #16	1,792

The final OPR Guidelines for Municipal Service Reviews recommended that service review reports address environmental justice issues, including the provision of affordable housing. Ventura County is ranked 114th out of 125 metropolitan areas for housing affordability in the United States with the cost of living 15% higher than the average U.S. city. The rise in single-family home sales prices has kept ownership out of reach for many of Ventura County’s residents. The percentage of households able to afford a median price home in for Ventura County is 47%, indicating that over half of County residents cannot qualify for homeownership. The County’s average income per capita varies from a low of \$13,632 in Santa Paula and Fillmore to \$32,932 in Thousand Oaks. In terms of income per household of a family of four, Santa Paula’s is \$35,565 compared to Moorpark’s \$83,282. The average household income in Fillmore is \$47,499. In Oxnard the per capita income is \$16,032 and income per household is \$46,000 and in Port Hueneme the per capita income was \$17,757 and household income was \$41,281.

There is a direct correlation between the cost and availability of housing, and a community's ability to sustain economic vitality. The fact that the available housing units cannot provide for the needs of additional entry level and non-skilled workers is a concern to Ventura County’s business community. Many people working in Ventura County’s industries earn significantly less than the median income. This creates a significant problem for Ventura County. As the local economy continues to thrive, the number of traditional and non-traditional households is on the rise and the gap between housing demand and supply widens. If local policies and priorities continue to focus on job growth and economic expansion without addressing the pressing needs of affordable housing, Ventura County’s economic growth could be slowed. If local businesses are forced to recruit commuters from other areas in order to meet their workforce needs, the County may also face considerable increased traffic congestion, and the corresponding air pollution.

Of the 10 agencies included within the Santa Clara River watershed service review report, the four cities and Ventura County provide both water/wastewater services and have responsibility for meeting regional “fair share” housing goals.

State law recognizes the vital role local governments play in the supply and affordability of housing. The City Councils of Fillmore, Oxnard, Port Hueneme and Santa Paula as well as Ventura County are required to adopt a Housing Element as one of the seven mandated elements of their General Plan. Housing element law, enacted in 1969, mandates that local governments adequately plan to meet the existing and projected housing needs of all economic

segments of the community. The law acknowledges that, in order for the private market to adequately address housing needs and demand, local governments must adopt land use plans and regulatory systems which provide opportunities for, and do not unduly constrain, housing development. As a result, housing policy in California rests largely upon the effective implementation of local general plans and housing elements.

Housing Elements must be updated regularly on a schedule established by California's Department of Housing and Community Development (HCD). HCD reviews local housing elements to determine their compliance with State law and reports its written findings to the local government. In Table V.3, Housing Element Compliance Review, shows the schedule and compliance status of each of the five agencies that are largely responsible for provision of affordable housing.

**TABLE V.3 HOUSING ELEMENT COMPLIANCE STATUS**

<b>AGENCY</b>	<b>DATE HOUSING ELEMENT ADOPTED</b>	<b>DATE HOUSING ELEMENT REVIEWED BY HCD</b>	<b>HOUSING ELEMENT IN COMPLIANCE</b>
City of Fillmore	2003	2003	Yes
City of Oxnard	2000	2001	Yes
City of Port Hueneme	2001	2001	Yes
City of Santa Paula	2002	2002	Yes
Ventura County	2001	2001	Yes

In terms of environmental justice concerns, the agencies included in this service review report do not discriminate among economic or ethnic groups in terms of rates of service delivery. Most water and wastewater providers have programs to help customers reduce costs. No other significant issues were noted.

## **V.4 INFRASTRUCTURE**

The legislation requiring service reviews provided little direction to LAFCOs for evaluating infrastructure needs and deficiencies. The Governor's Office of Planning and Research (OPR) developed Service Review Guidelines, which were finalized in August of 2003, included twelve suggested factors LAFCOs could use in identifying an agency's infrastructure needs and deficiencies. Several of the factors, including governmental structure options, duplicative facilities and locations of facilities, have been addressed in other portions of this report.

The Ventura LAFCO service review questionnaire used the presence and frequency of master plans as well as an annual capital improvement (CIP) budget as a means of assessing an agency's process of evaluating infrastructure needs and deficiencies. Master plans and CIPs, as plans for future service needs, are public documents reviewed the governing body, other affected agencies and the public. Agencies that are small, provide limited service, or are fully built-out may not have master plans; however, most public agencies prepare annual CIP budgets as a means of meeting current and future service needs.

Agencies were asked the date of the current master plan and previous master plan. While there are no established standards for the frequency of preparation, typically master plans for water and wastewater agencies are prepared every 5-10 years. The type of service area (i.e., level of development, rate of growth or presence of growth control initiatives) can also affect the frequency of preparation. Table V.4, Master Plans and CIPs, shows the agencies and information regarding master plans and capital improvements budgets.

TABLE V.4 MASTER PLANS AND CIPS

	DATE OF CURRENT WATER MASTER PLAN	DATE OF PREVIOUS MASTER PLAN	CIP BUDGET	DATE OF CURRENT WASTEWATER MASTER PLAN	DATE OF PREVIOUS MASTER PLAN	CIP BUDGET
City of Fillmore	2002	1987	Yes	1989	None Reported	Yes
City of Oxnard	2002	1986	Yes	*	None Reported	Yes
City of Port Hueneme	2002	NA	Yes	2002	NA	Yes
City of Santa Paula	None Reported	None Reported	None Reported	None Reported	None Reported	None Reported
Channel Islands Beach CSD	None Reported	None Reported	Yes	*	None Reported	Yes
Fox Canyon GMA	1985	NA	NA			
Ocean View MWD	No	NA	NA			
United Water CD	No	None Reported	Yes			
CSA #30				No	NA	Yes
Waterworks District #16	No	NA	Yes	No	NA	Yes

\* Agencies reported having a wastewater master plan but did not give the date of that plan.

The service review questionnaire also asked for a wide range of information regarding the capacity, age, storage, peak demand and sources of water. The data was collected to allow Ventura LAFCO to adopt the legally required determinations for service reviews while also building a database of information that could be used to analyze and update spheres of influence and future annexation/detachment proposals.

Table V.5, Water System Information, depicts data obtained from responses to the service review questionnaire regarding number of customers, capacity and the system/facilities of the retail systems.

TABLE V.5 WATER SYSTEM INFORMATION

	TOTAL # OF CONNECTIONS	MILE OF LINES	STORAGE	ESTIMATED PEAK DEMAND	ESTIMATED PEAK CAPACITY	DATE OF WATER QUALITY REPORT
City of Fillmore	3,671	47	2	4.4 mgd	8.5 mgd	None Reported
City of Oxnard	32,918	None Reported	None Reported	23.2 mgd	34.8 mgd	2002
City of Port Hueneme	5,154	100	None Reported	9 cfs	11 cfs	2002
City of Santa Paula	None Reported	None Reported	None Reported	None Reported	None Reported	None Reported
Channel Islands Beach CSD	1,779	16	*	1,890 gpm	1.8 mgd	2002
Fox Canyon GMA	NA	NA	NA	NA	NA	NA
Ocean View MWD	50	None Reported	None	None Reported	None Reported	**
United Water CD***	1,104	35	4.25	53, 75 and 55 cfs	53, 75 and 50 cfs	2002
Waterworks #16	8	2	****	0.02 mgd	****	None Reported

\* The Channel Islands Beach CSD noted that it has agreements with the Cities of Port Hueneme and Oxnard to supply water in the event of a drop in pressure; therefore the need to construct storage facilities is minimized.

\*\* The Ocean View MWD noted that the United Water CD provides its water quality reports.

\*\*\* The United Water CD has three separate systems; the total number of lines and storage capacity has been combined for use in this table.

\*\*\*\* Water for Waterworks District #16 is provided by the Warring Water Company, which also provides operation and maintenance to the District.

One related issue specific to Ventura County and important in the Santa Clara River watershed service review area is the presence of private and mutual water companies and their impact on water supply and demand. Although private water service providers, both investor-owned and mutual, are outside LAFCO's jurisdiction, they serve important roles in the provision of service. Some of the larger private and mutual water agencies are virtually indistinguishable from public agencies; they plan for present and future infrastructure needs, meet all regulatory requirements and have adequate financial resources. It is sometimes difficult for local agencies and customers to obtain rate, capacity and other information about private/mutual water purveyors.

Another related issue is the presence of private wells. In Ventura County there are approximately 9,000 wells with approximately 3,500 of the 9,000 active, 3,800 inactive and 2,000 abandoned. Not all of the active wells are metered and it is estimated that there may be as many as 400-500 unregistered wells operating in Ventura County; both factors contribute to incomplete data on the availability of water supply. (It should also be noted that there are several water agencies in Ventura County that have not metered all their customers.) In terms of governmental regulation, if a well serves three or less connections, it is considered a private well. Ventura County regulates wells with 4 to 15 connections and the State regulates wells with 15 or more connections. While agencies such as the Fox Canyon Ground Water Management Agency and the United Water Conservation District monitor wells, data is sometimes lacking.

Planning for Ventura County's future infrastructure needs and deficiencies must include appropriate information from all water agencies, public and private, as well as complete data about wells. It is suggested that the Ventura LAFCO database be expanded to include information regarding private and mutual water companies in order to more accurately assess present and probable service demand and supply.

**a) Wholesale/Groundwater**

The United Water CD provides a range of services including water conservation, groundwater replenishment, water delivery and recreational facilities.

In terms of water conservation the agency owns and operates Santa Felicia Dam (Lake Piru) which is the major reservoir for the agency's groundwater recharges efforts. Its groundwater replenishment includes the investment of more than \$50 million in projects to increase the supply of groundwater in the basin to help reverse the intrusion of saltwater. The intrusion from saltwater into the basin has receded and water quality in intruded wells has improved.

The United Water CD also provides wholesale water delivery to three separate areas. One is the Oxnard/Hueneme system located in the Oxnard/El Rio area which serves the City of Oxnard, the Port Hueneme Water Agency (City of Port Hueneme, Channel Islands Beach CSD) and the Navy bases at Point Magu and the Construction Battalion Center. A second pipeline supplies water to the Pleasant Valley area from Oxnard to Camarillo. The third system serves agricultural uses in the Oxnard Plain. The United Water CD also provides water to private/mutual water companies and monitors groundwater, which is a critical resource in the watershed. The District operates three by pipelines, which have a combined delivery of 31,200 AF per year.

As noted by the agency, cross-contamination of aquifers by leakage of near-surface waters through abandoned wells appears to be the largest source of contamination besides saltwater intrusion. There are at least one thousand abandoned wells on the Oxnard plain and priority has been given to locating and properly sealing them up. The United Water CD is working with other agencies to properly seal these wells.

**b) Wastewater Agencies**

Wastewater agencies and departments were asked a similar series of questions about the capacity of their facilities. Agency responses and additional information taken from the State Water Resources Control Board report, "Wastewater User Charge Survey Report FY 2001-02", are summarized in the Table V.6, Wastewater Agency Information.

The Cities of Santa Paula and Fillmore are considering a joint \$63 million wastewater treatment plant to serve the future needs of the residents of Santa Paula and Fillmore. In preliminary discussions, the location of the facility would be west of Santa Paula. To serve current and future residents, it is expected that the plant would consist of a treatment plant and percolation ponds on approximately 60 acres with a 15-mile pipeline from Fillmore to the new plant.



TABLE V.6 WASTEWATER AGENCY INFORMATION

	TOTAL # OF CONNECTIONS	RATED CAPACITY (MGD)	ADWF* (MGD)	TREATMENT LEVEL	MILES OF LINES	PERMIT STATUS
City of Fillmore	4,358	1.3	0.9	Secondary	29	In Process
City of Oxnard	32,946	31.7	22.5	Secondary	425	Current
City of Port Hueneme	6,203	**	**	**	**	**
City of Santa Paula	None Reported	None Reported	2	Secondary	None Reported	In Process
Channel Islands Beach CSD	1,670	**	0.32	Secondary	18	**
CSA #30	510	**	0.2	Secondary	8	**
Waterworks District #16	512	0.2	0.22	Secondary	7	In Process

\*Average Dry Weather Flow; \*\*Agencies discharge wastewater to the Oxnard Regional Treatment Facility.

The joint facility is being studied since the current wastewater treatment plants in both communities are aging and have been unable in the past to meet Federal and State guidelines. The Fillmore plant was constructed in 1956 and Santa Paula's plant was completed in 1939. Since 1997, when the LARWQCB imposed new and stricter water quality conditions, the Santa Paula plant has recorded more than 1,000 violations of water standards while the number of violations for the Fillmore facility has numbered 76 during the same time period.

Private contractors operate both plants. In Santa Paula, the private contractor took over operations in the late 1990s from the Ventura Regional Sanitation District. Currently the Santa Paula plant is the subject of an investigation into alleged violations of environmental standards at the plant but no charges have been filed as of the date of this report.

Recently the LARWQCB approved a revision of the discharge permit for the City of Fillmore that allowed the plant to meet standards for the Biological Oxygen Demand (BOD) level. In 1992 the LARWQCB had set a BOD level for the Fillmore plant, which was lower than the technological capability of the plant. Since 1992 the City of Fillmore had spent nearly \$1 million improving its plant and raised rates by approximately 25% in an effort to meet the standards. The current permit revision, while still complying with federal and state regulations, is more consistent with the plant's technology. It also results in additional capacity at the City's wastewater plants, which was previously operating with a moratorium against new connections. However, the additional capacity is generally sufficient to only serve a proposed development, the Heritage Valley development.

The cost to both cities of building a modern sewage plant in partnership is projected to cost approximately \$63 million which is estimated to reduce total costs approximately 7% when compared to the cost of each jurisdiction building and operating their own facility. It is expected that the two cities would form a JPA to oversee the operation and maintenance of the plant and pipeline. It has been reported that the Cities of Fillmore and Santa Paula have agreed to divide costs by assigning approximately 60% to the City of Santa Paula and 40% to the City of Fillmore although no agreements were submitted to LAFCO as part of this service review report.

It has also been reported that the two cities have agreed that the treatment plant will be sized to handle only development already contemplated in the General Plans of each city. The plant

would be built to accommodate the growth anticipated in the 20 year planning horizon and designed to allow for increased capacity over its 75-year operational life if needed. However, no copies of the agreement were submitted to LAFCO as part of this service review.

The joint wastewater project and alternatives will first undergo a complete environmental review as required by the California Environmental Quality Act (CEQA) and the National Environmental Protection Act (NEPA). The Cities of Fillmore and Santa Paula recently hired a consulting firm, P&D Consultants, Inc., to prepare the environmental impact report (EIR) as required by CEQA and environmental impact statement (EIS) as required by NEPA. The consultant is under contract and is just now beginning work on the documents with completion of the environmental review process anticipated toward the end of 2004. The two Cities have reported that they are currently participating in a feasibility study for construction of the plant and that study is expected to be completed in the fall of 2003; again it is unclear if the feasibility study has been started.

In the interim, the City of Fillmore hired an engineering firm to prepare a report to improve the performance of the Fillmore plant to bring it into compliance with the current NPDES permit, as recently approved by the LARWQCB, and to examine means of increasing the current treatment plant capacity. The study concludes that approximately \$800,000 in improvements would be needed and it is assumed that the developer of the Heritage Valley development would fund a major portion of the improvements. The report also concluded that:

*“The City should, however, recognize that an old plant, where there may be many constraining factors, which may not have become evident during this brief short-term study, might not always under all flow and pollutant conditions produce the desired effluent without major modifications to the plant...”*

The provision of wastewater services is a significant service review issue and, until more definitive plans for increasing the capacity of the existing facilities or constructing a new facility are known, it represents an area of infrastructure deficiency.

## **V.5 FINANCING CONSTRAINTS AND OPPORTUNITIES**

To evaluate financial constraints and opportunities in relation to existing and projected service needs, the service review questionnaire collected data regarding total revenues and expenditures, bond ratings, reserve levels and the presence of audits. Only two agencies, the Cities of Fillmore and Santa Paula, noted that their audits were qualified due to an incomplete fixed asset listing.

Agencies were also asked to identify any financing constraints and opportunities that affect the service provided and the infrastructure needs. The intent was to find any specific constraints or opportunities beyond existing legislative, political and governmental regulations. Several agencies noted financing constraints unique to their agency. The legislation that formed the Fox Canyon GMA limited its management fee to \$3.00 per acre-foot of ground water pumped from wells within their boundaries. Since pumping fees are the sole source of income for the Fox Canyon GMA, rising annual costs may, at some point in the near future, exceed income.

The United Water CD noted that they must maintain its rates at or below levels that encourage the use of our pipelines/facilities in lieu of increased pumping of groundwater and potential over drafting of aquifers and subsequent increased seawater intrusion. However, the cost of unfunded mandates for improving water quality, the need to replace infrastructure and the

State's shifting of property tax from local agencies to the State makes the District's efforts to balance rates and achieve its objectives increasingly difficult.

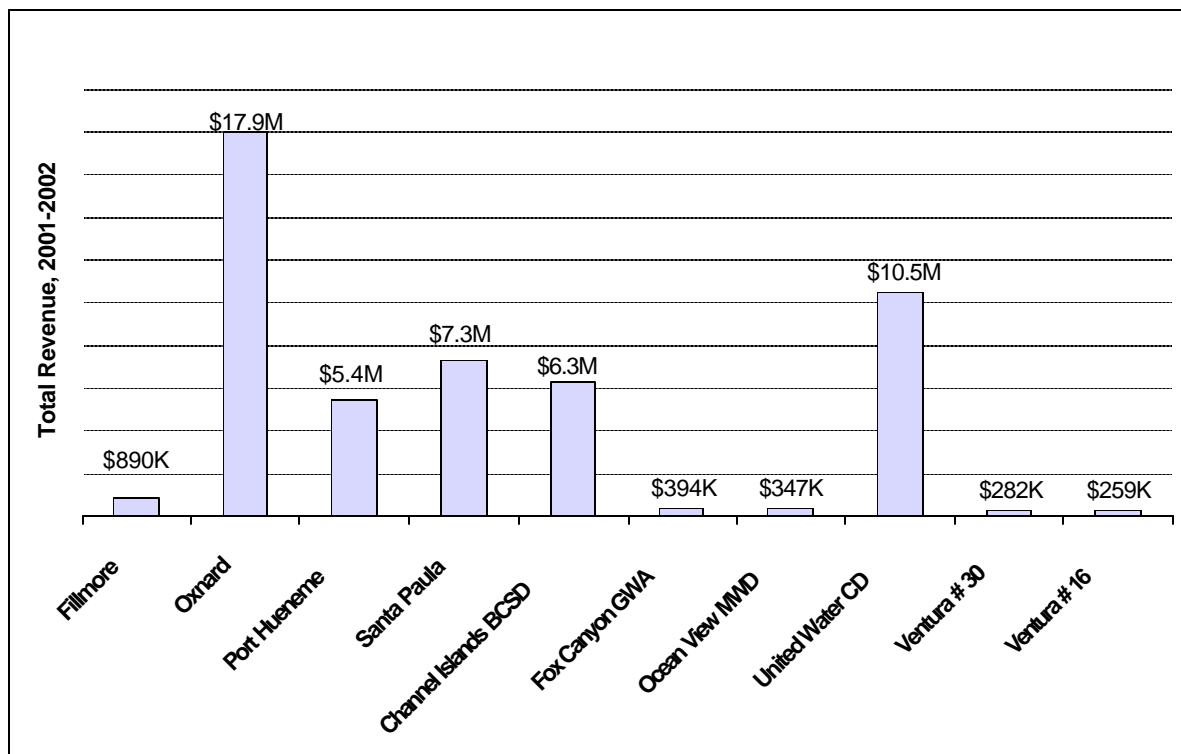
Finally, both CSA #30, which provides wastewater services to the community of Nyeland Acres, and Waterworks District #16, which provides water and wastewater services to the community of Piru, noted that their customer base includes lower income residents and that environmental justice concerns must be addressed when rates are set. This is also true with the Cities of Fillmore, Oxnard and Santa Paula where median income lags behind the rest of Ventura County.

Few agencies identified any additional financing constraints except for the limits placed on them by their size and by increased cost of unfunded mandates, primarily regarding water quality. Most agencies noted that their governing board looked at rates annually to ensure a balance between rates and capital needs.

The service review questionnaire asked agencies to provide total revenues, revenue sources, CIP budget and reserves for the previous three fiscal years, which is summarized in the tables contained in Appendix A.

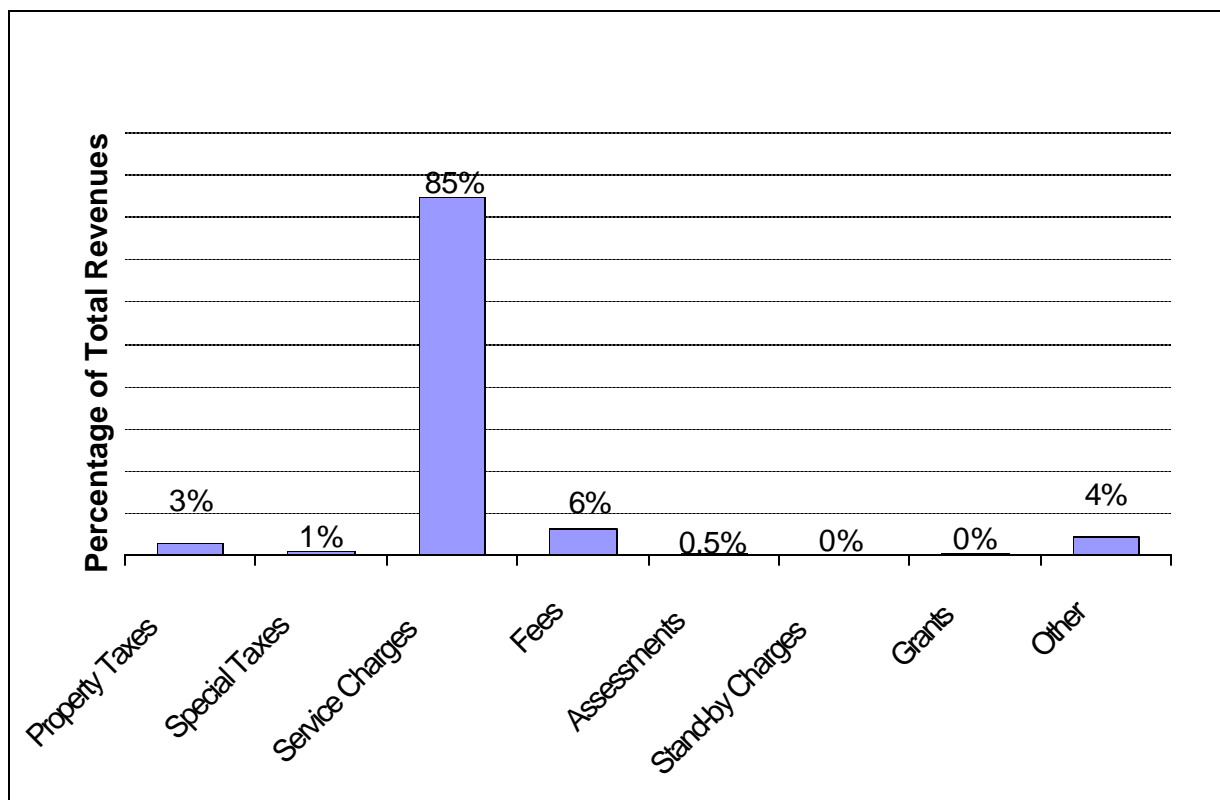
Exhibit V.2, Agency Revenue Comparison, and Exhibit V.3, Aggregate Sources of Agency Revenue, compare total revenues for all agencies and aggregate sources of revenues. Data from FY 2001-2002 was used to compare actual numbers. In comparison with Exhibit V.4, Agency CIP Comparisons, it is important to note the substantial capital improvements needs of the Cities of Fillmore and Santa Paula in relation to the agency revenue.

Exhibit V.2  
2001-2002 AGENCY REVENUE COMPARISON



As enterprise activities, the primary revenue source for all water and wastewater agencies comes from service charges and fees directly related to the provision of services. Other income generally comes from interest from various funds. Exhibit V.4, 2001-2002 Aggregate Sources of Agency Revenues, shows that water and wastewater agencies, as enterprise funds, derive by far the majority of their income from service charges and fees.

Exhibit V.3  
 2001-2002 AGGREGATE SOURCES OF AGENCY REVENUES



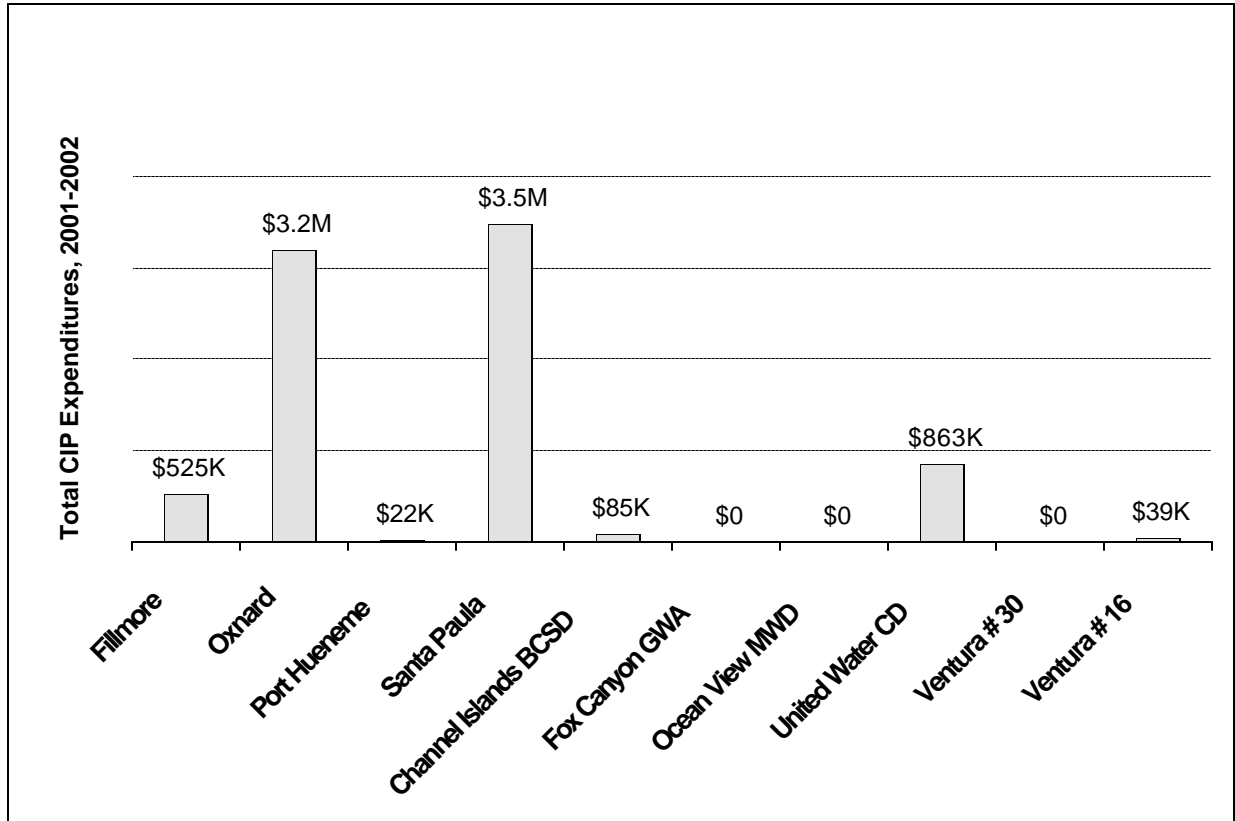
The amount of property tax revenue each agency received during FY 2001-2002 is shown in Table V.7, 2001-2002 Property Tax Revenue. Property tax revenue for the four cities was not included; it is assumed that General Fund revenues are not used to support enterprise fund activities. The United Water CD noted that approximately \$600,000 annually has been shifted from the agency to the State's budget. The following amount represents the current amount of property tax received by the United Water CD.

TABLE V.7 2001-2002 PROPERTY TAX REVENUE

	PROPERTY TAX REVENUE
Channel Islands Beach CSD	0
Fox Canyon GMA	0
Ocean View MWD	\$754
United Water CD	\$1,172,599
CSA #30	0
Waterworks District #16	\$25,792
<b>TOTAL</b>	<b>\$1,199,145</b>

A comparison of the capital improvement budgets for the Fiscal Year 2001-2002 is shown in Exhibit V.4, 2001-2002 Agency CIP Comparisons.

Exhibit V.4  
2001-2002 AGENCY CIP COMPARISON

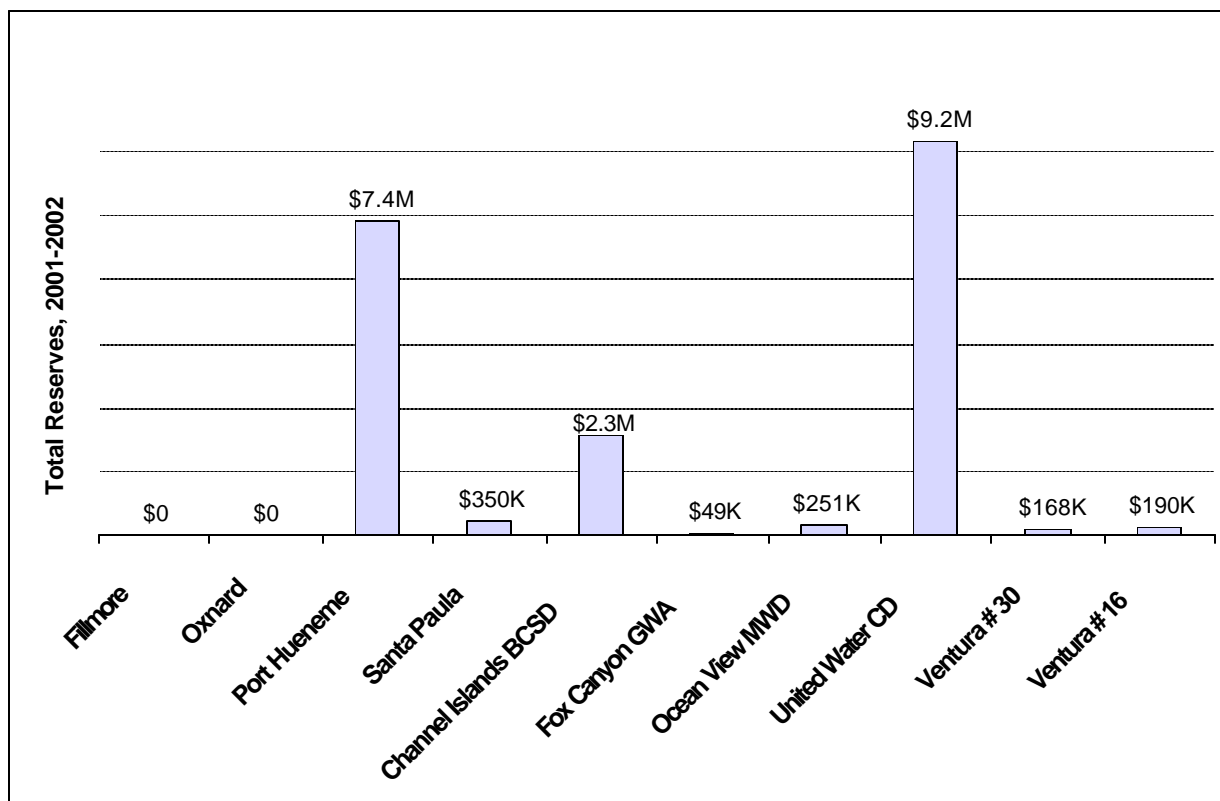


Data about agency reserve levels was also collected as part of the service review. The issue of reserve levels was raised as a general statewide concern in the 2000 Little Hoover Commission report on special districts. That report concluded that some agency reserves appear unreasonably large, are not integrated into infrastructure planning and/or are obscure. Data collected for this service review did not find that the agencies in the Santa Clara River watershed service review area showed evidence of the concerns noted by the Little Hoover Commission for agencies in other parts of California.

Ventura LAFCO asked agencies to report reserves in the categories of operating, capital, rate stabilization, restricted and other for the previous three fiscal years. Exhibit V.5, 2001-2002 Agency Reserve Comparison, compares combined reserve amounts.

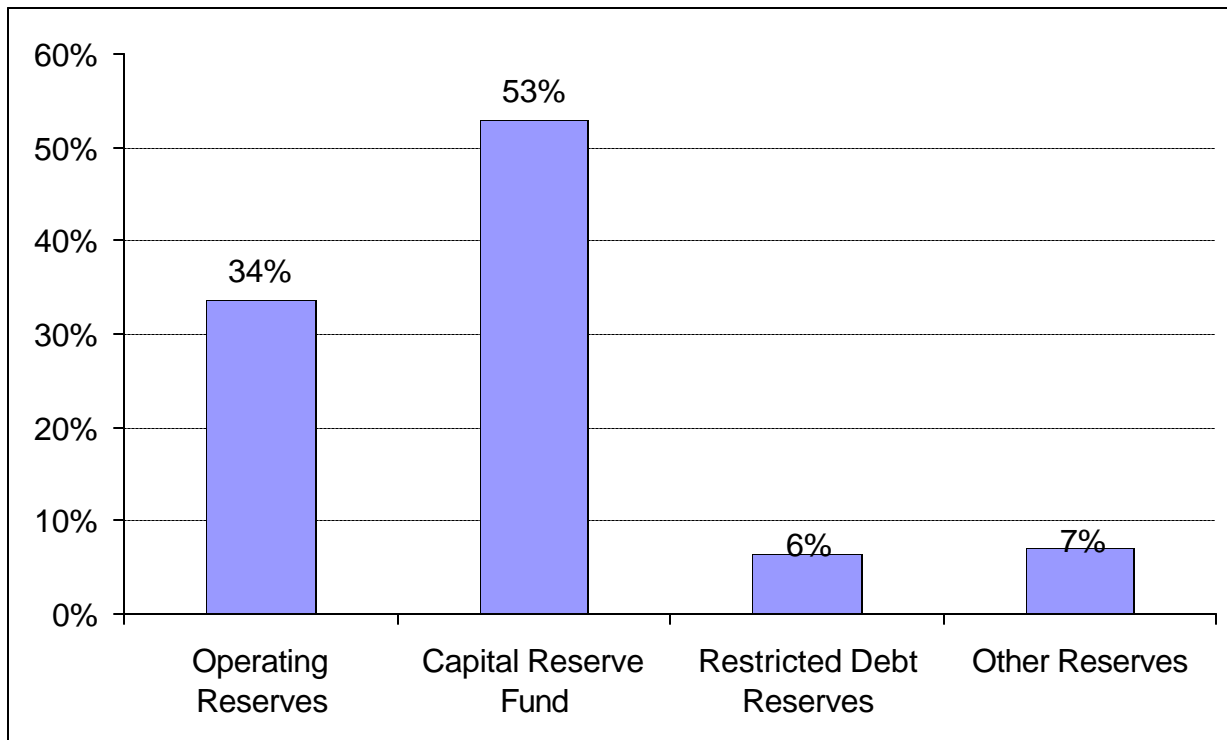
Setting specific levels of reserves for the diversity of agencies addressed in this service review report is impracticable. The different services, service areas, customer bases, condition of infrastructure, capital improvement programs and other issues require reserve levels specific to each agency. All reserve levels reported by the agencies were clearly segregated into the uses for the reserves—operating and rate stabilizations, restricted debt reserves and capital reserves funds. Information from the Cities of Fillmore and Oxnard was not available and has been listed at zero in Exhibit V.5.

Exhibit V.5  
 2001-2002 AGENCY RESERVES COMPARISON



In the service review questionnaire, agencies were asked to report operating reserves and operating/rate stabilization reserves separately. Operating reserves were defined as unallocated general reserves that are set-aside for budgetary shortfalls or for purposes not otherwise specifically designated. Operating and rate stabilization funds were defined as funds used to temper short-term fluctuations in delivery costs and to maintain constant and predictable rates to customers. Due to an error in the service review questionnaire, these definitions were not clear and some agencies noted in their responses that the two categories were typically considered the same. Therefore in Exhibit V.6, Aggregate Reserves by Category, the two categories of reserves, Operating and Operating/Rate Stabilization, were combined.

Exhibit V.6  
AGGREGATE RESERVES BY CATEGORY



As mentioned previously, there are no generally accepted levels for operating reserves. However, the Little Hoover Commission report noted that the International City Managers Association recommends, as one criteria of solvency, that a city government have three months of operating expenses in reserves. Using that criterion, Table V.8, Estimated Three Month Reserves, shows the estimated monthly and three month total of operating expenses for each agency, the combined amount of Operating/Operating and Rate Stabilization reserves and the number of months of operating reserves reported by the agencies. In general, special districts have more than three months operating reserves due to fluctuations in costs and the absence of other reserves often held by municipalities.

TABLE V.8 ESTIMATED 3-MONTH RESERVES

	ESTIMATED MONTHLY OPERATING EXPENSES	ESTIMATED THREE MONTH OPERATING EXPENSES	TOTAL OPERATING RESERVES	NUMBER OF MONTHS OF OPERATING RESERVES
City of Fillmore	\$74,167	\$222,500	None Reported	NA
City of Oxnard	\$1,497,495	\$4,492,486	None Reported	NA
City of Port Hueneme	\$456,389	\$1,369,168	*	NA
City of Santa Paula	\$607,615	\$1,822,845	\$350,000	0.5
Channel Islands Beach CSD	\$522,546	\$1,567,639	\$600,000	1.1
Fox Canyon GMA	\$32,867	\$98,601	\$49,301	1.5
Ocean View MWD	\$28,972	\$86,916	\$251,297	9.0
United Water CD	\$873,536	\$2,620,607	\$5,411,505	6.0
CSA #30	\$23,524	\$70,574	\$35,000	1.5
Waterworks District #16	\$21,583	\$64,751	\$62,156	3.0

*\*The City of Port Hueneme only maintains capital improvement reserves for its enterprise activities.*

## V.6 COST AVOIDANCE OPPORTUNITIES

In evaluating cost avoidance opportunities, Ventura LAFCO examined current practices used by the agencies to reduce or avoid costs including the use of outside vendors and contractors. Overlapping or inefficient service boundaries were also examined as a means that Ventura LAFCO can use to encourage efficiently provided water and wastewater services and avoid costs.

As part of the service review process, all water and wastewater agencies were given LAFCO-generated maps of their jurisdictional and sphere of influence boundaries. Agencies were asked to note on the maps:

- Areas of duplication of planned or existing facilities with another agency
- Areas better served by another agency
- Areas better served by the responding agency
- Areas outside the agency's boundaries which currently receive service
- Areas difficult to serve or with illogical boundaries



Ventura LAFCO and the consulting team mapped the changes noted by the agencies and labeled them as “special study areas”. During interviews, the staff of some agencies also noted areas with service issues, which were also mapped. The service provision issues of the special study areas were not studied in depth as part of the service review. The purpose was to update the Ventura LAFCO GIS-based maps so staff could use them for future studies as well as a means of ranking subsequent SOI studies

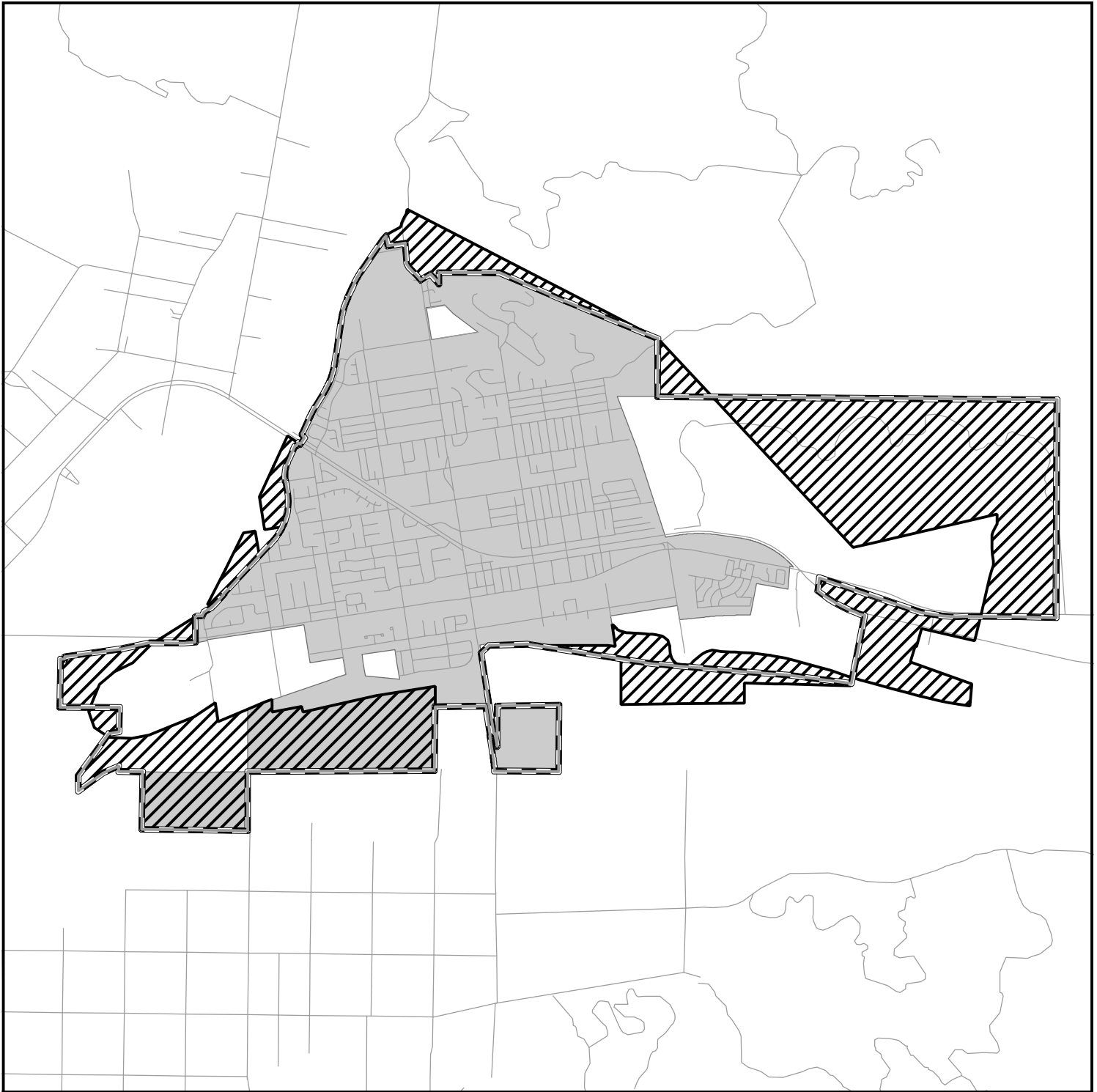
Table V.9, Special Study Areas, lists the agencies included within the Santa Clara River watershed service review area with special study areas and SOI issues. Maps for the agencies addressed by the Santa Clara River watershed service review report follow are included and labeled as:

- Figure V.2 City of Fillmore
- Figure V.3 City of Oxnard
- Figure V.4 City of Port Hueneme
- Figure V.5 City of Santa Paula
- Figure V.6 Channel Islands Community Services District
- Figure V.7 Fox Canyon Groundwater Management Agency
- Figure V.8 Ocean View Municipal Water District
- Figure V.9 United Water Conservation District
- Figure V.10 County Service Area # 30-Nyeland Acres
- Figure V.11 Ventura County Waterworks District #16-Piru






Revised maps for all agencies with suggested study areas are included in the updated Ventura LAFCO GIS system.

TABLE V.9 SPECIAL STUDY AREAS

	SPECIAL STUDIES AREAS	SUMMARY OF ISSUE	ESTIMATED LEVEL OF ANALYSIS REQUIRED
City of Fillmore	Yes	1) Discrepancies between SOI and CURB	High
City of Oxnard	Yes	1) Discrepancies between SOI and CURB 2) Potential annexation areas	Moderate
City of Port Hueneme	None Noted	NA	Low
City of Santa Paula	Yes	1) Possible SOI change 2) Discrepancy between SOAR, boundary and SOI	High
Channel Island Beach CSD	Yes	1) Discrepancies between developed portions of harbor and agency boundaries	Moderate
Fox Canyon GMA	Yes	1) Possible SOI amendment 2) Possible annexation/SOI change— aquifer outcrop area	Moderate
Ocean View MWD	None Noted	NA	Low
United Water CD	None Noted	NA	Low
CSA #30	None Noted	NA	Low
Waterworks District #16	None Noted	NA	Low



**LEGEND**

-  City of Fillmore Sphere
-  Proposed City of Fillmore Sphere
-  City of Fillmore
-  Special Study Areas
-  City of Fillmore CURB Boundary

# Ventura LAFCO City of Fillmore

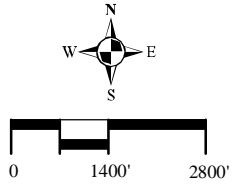


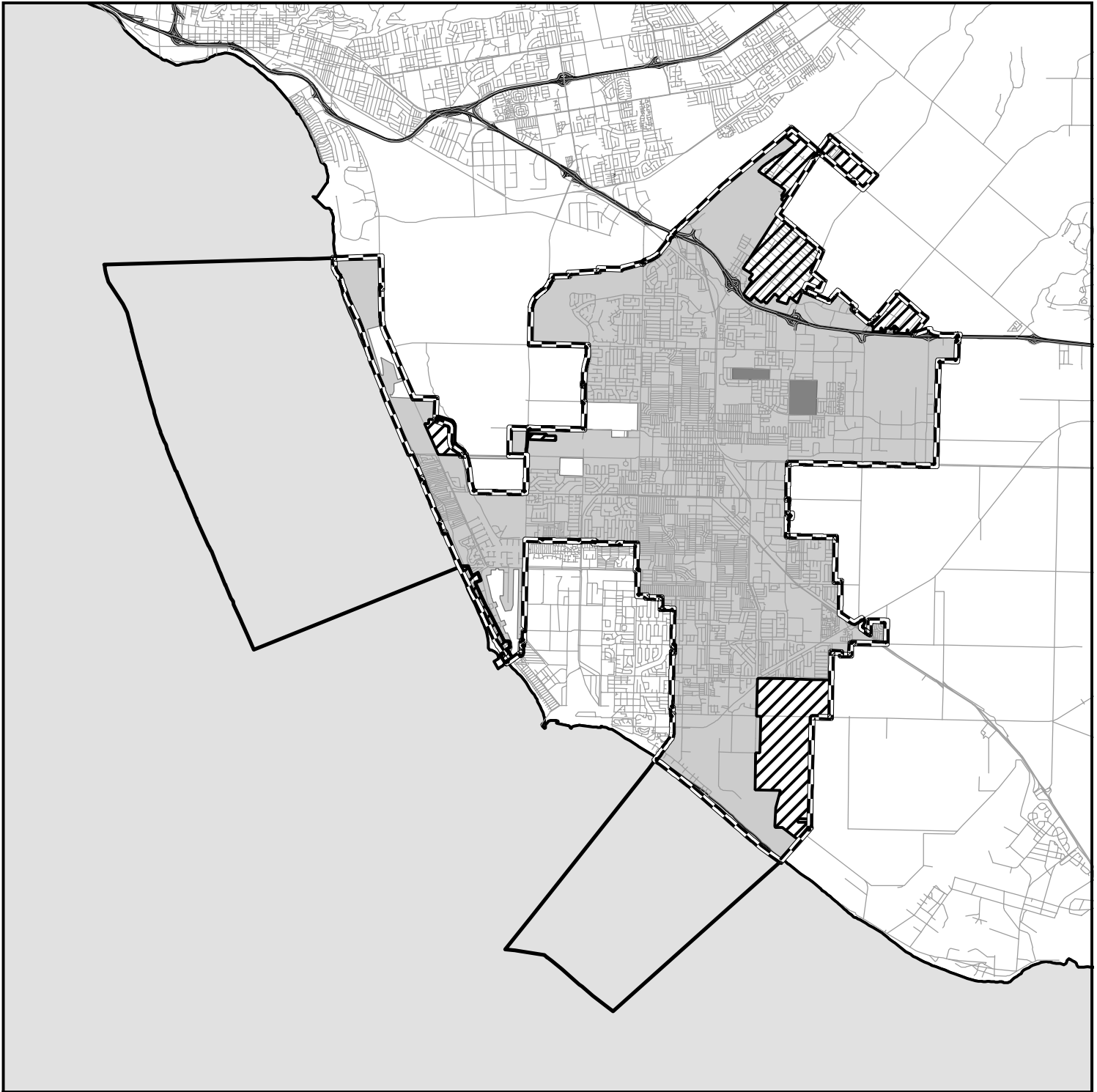
Figure V.2

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**LEGEND**

-  City of Oxnard Sphere
-  City of Oxnard
-  Pending Development
-  Special Study Areas
-  City of Oxnard CURB Boundary

# Ventura LAFCO City of Oxnard

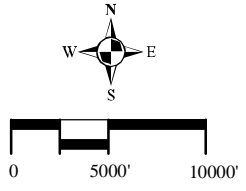


Figure V.3

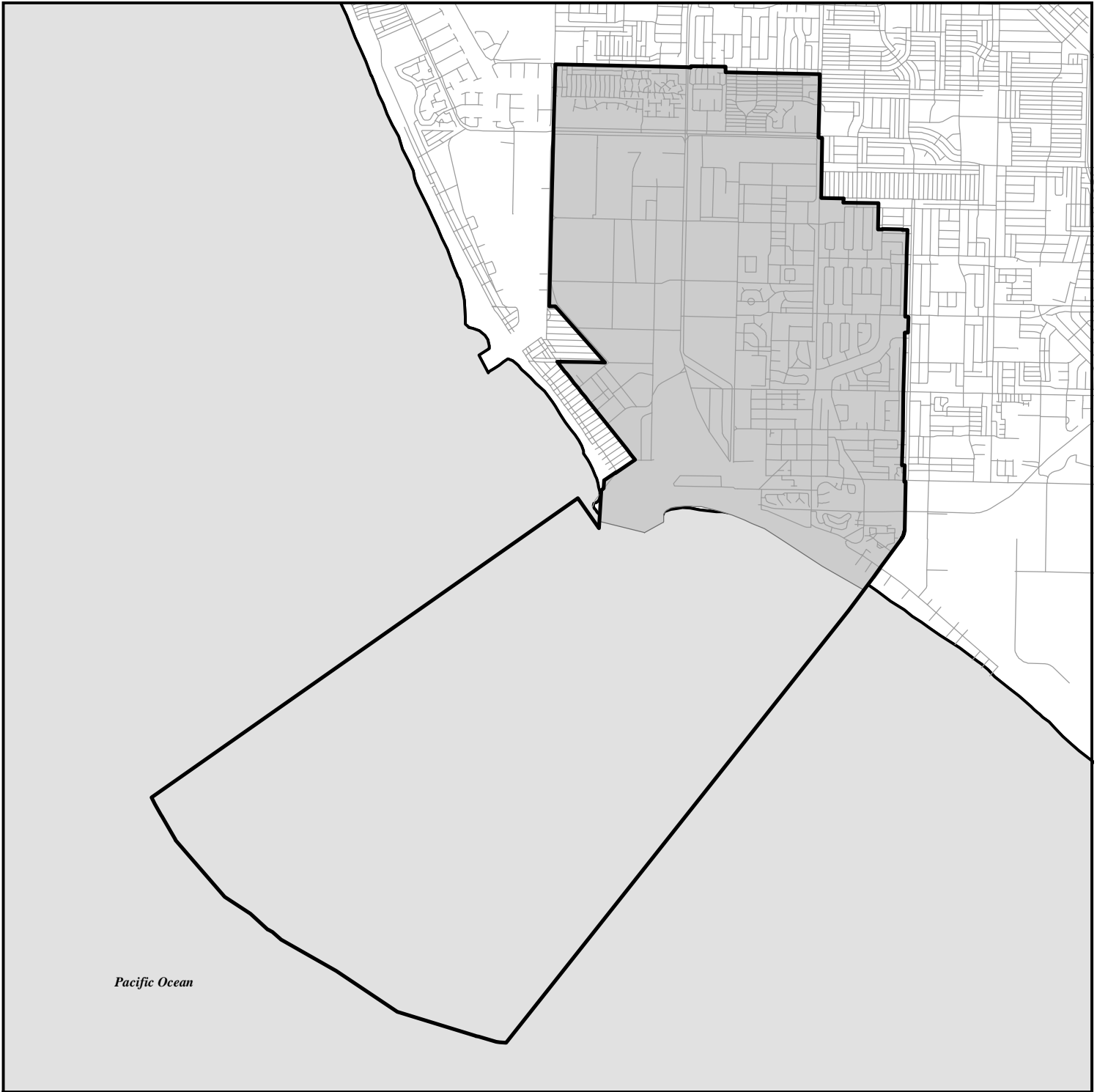
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 619-235-9471 FAX 619-234-0349



**LEGEND**

-  City of Port Hueneme Sphere
-  City of Port Hueneme

# Ventura LAFCO City of Port Hueneme

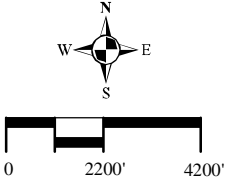


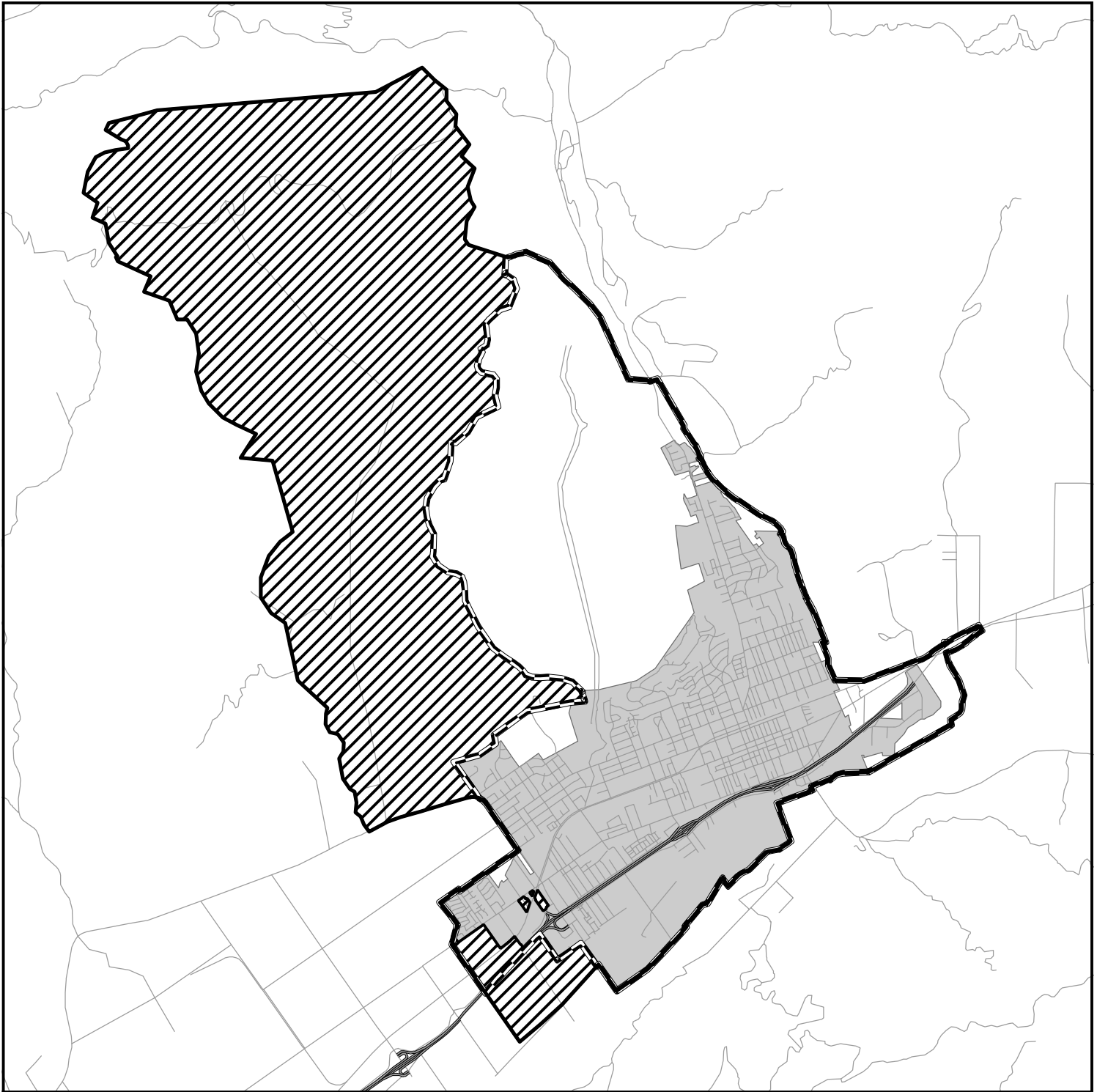
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**LEGEND**

-  City of Santa Paula Sphere
-  City of Santa Paula
-  Special Study Areas
-  City of Santa Paula CURB Boundary

## Ventura LAFCO City of Santa Paula

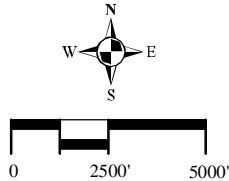


Figure V.5

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**LEGEND**

-  Channel Islands Beach Community Services District Sphere
-  Channel Islands Beach Community Services District
-  Special Study Areas

# Ventura LAFCO Channel Islands Beach Community Services District

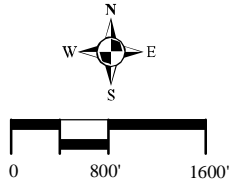


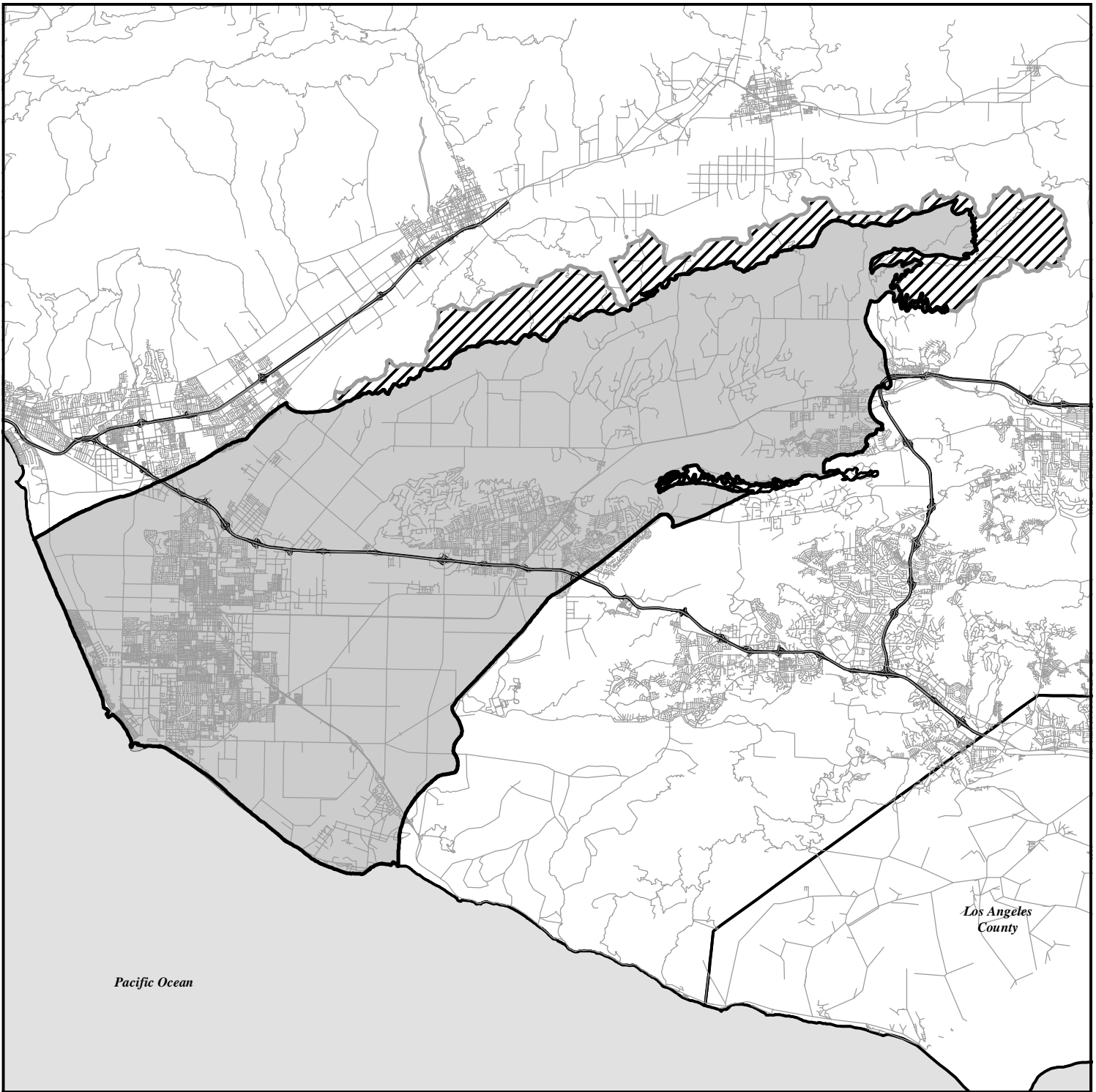
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**LEGEND**

-  Fox Canyon Groundwater Management Agency Sphere
-  Possible Sphere of Influence Change
-  Fox Canyon Groundwater Management Agency
-  Special Study Areas

# Ventura LAFCO Fox Canyon Groundwater Management Agency

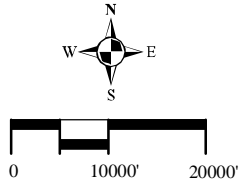


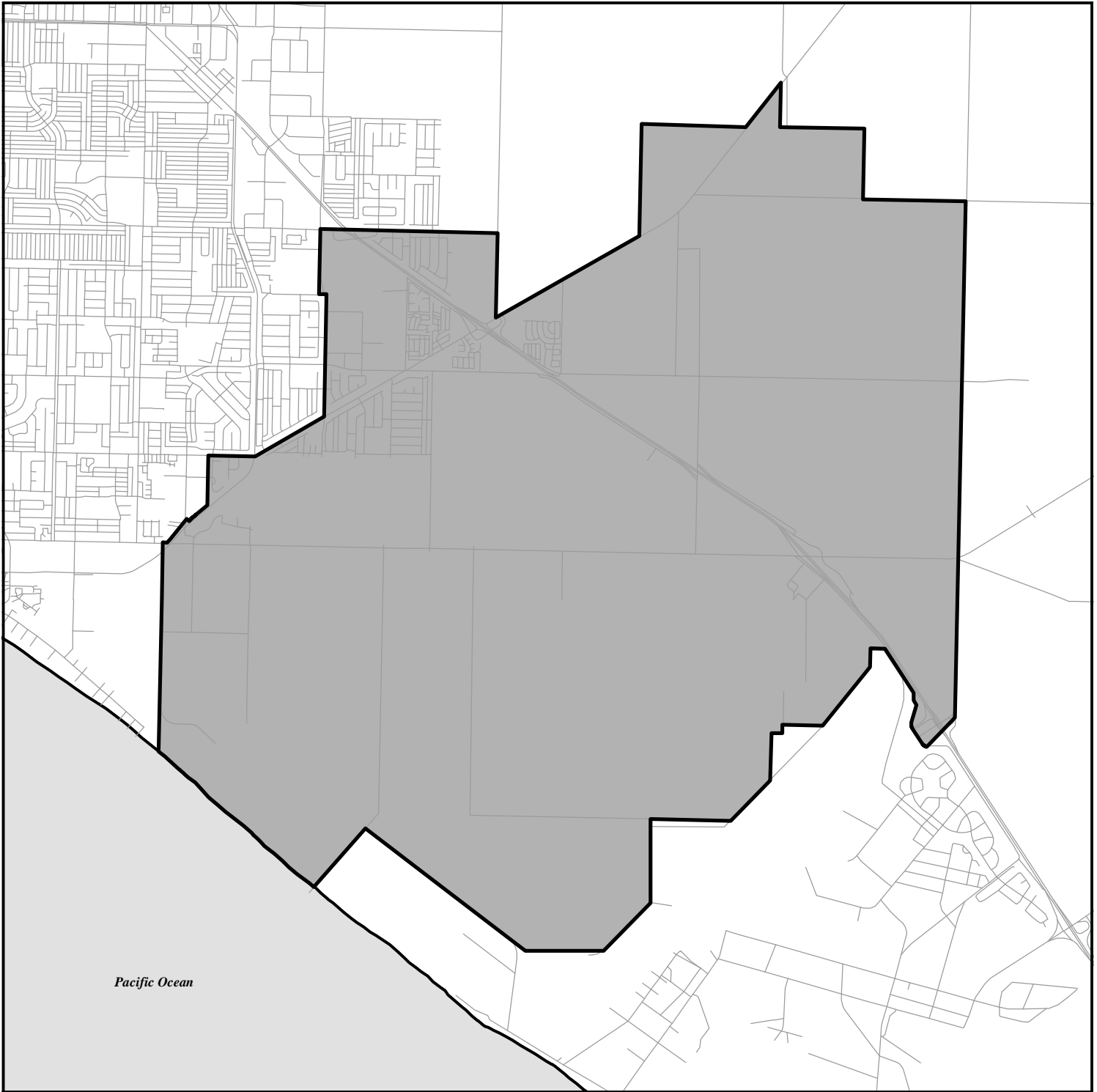
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**LEGEND**

-  Ocean View Municipal Water District Sphere
-  Ocean View Municipal Water District

# Ventura LAFCO

## Ocean View Municipal Water District

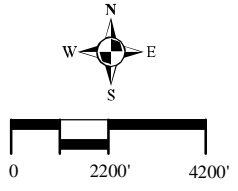


Figure V.8

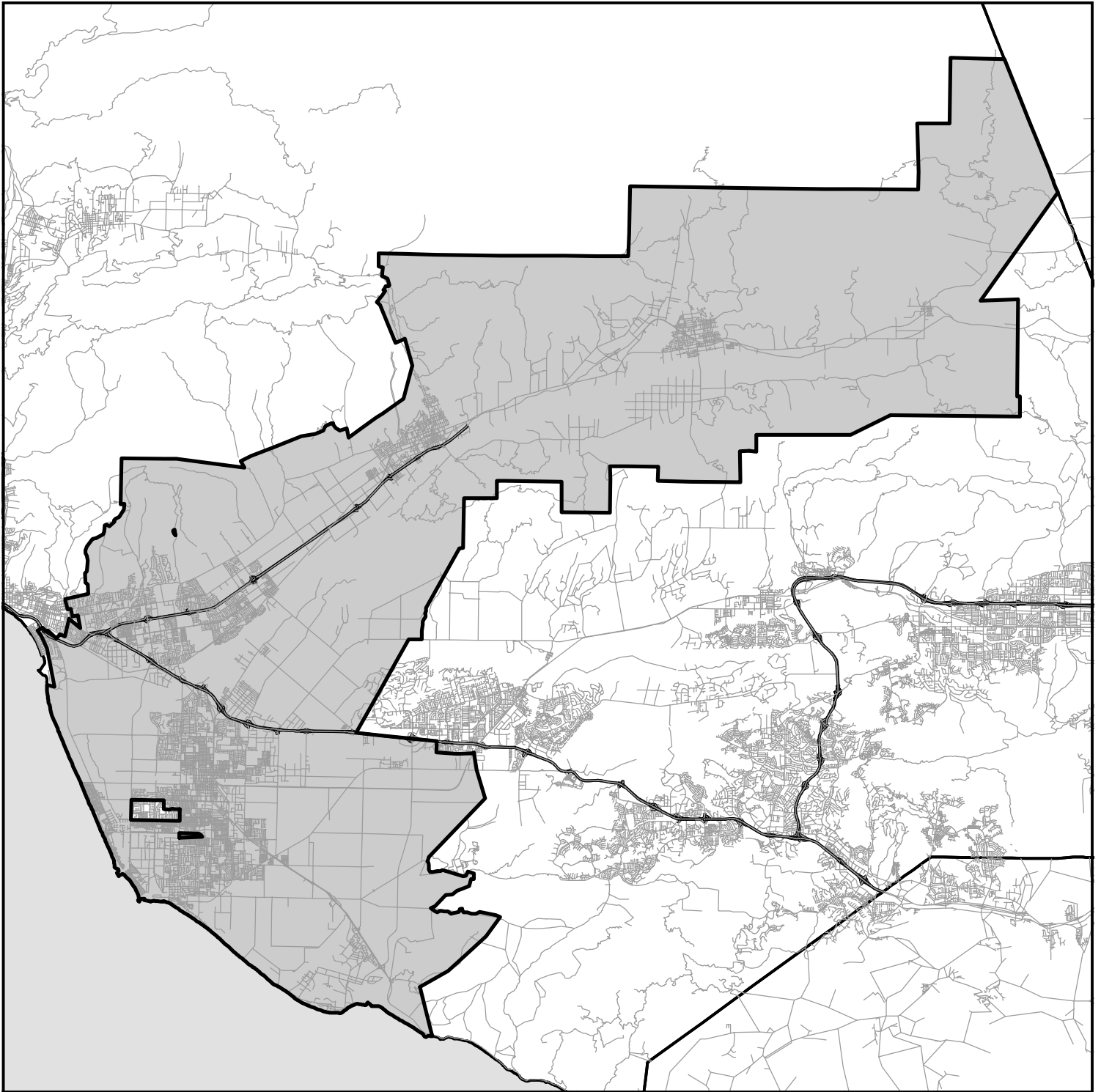
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**LEGEND**

-  United Water Conservation District Sphere
-  United Water Conservation District

# Ventura LAFCO

## United Water Conservation District

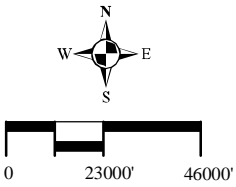


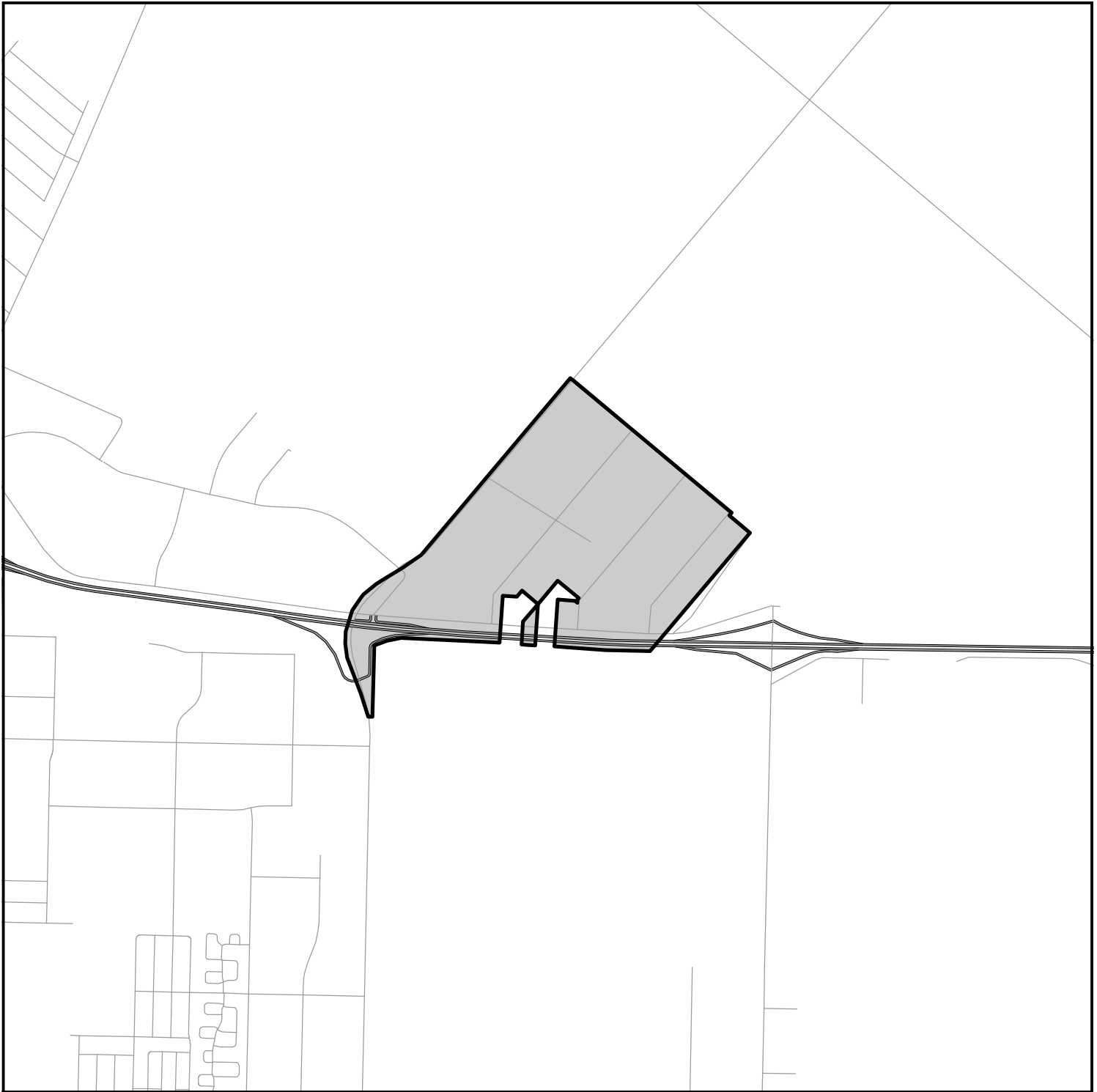
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**LEGEND**

-  Ventura County Service Area #30 Sphere
-  Ventura County Service Area #30

# Ventura LAFCO

## Ventura County Service Area #30

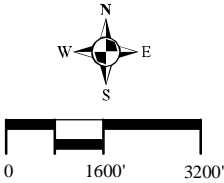


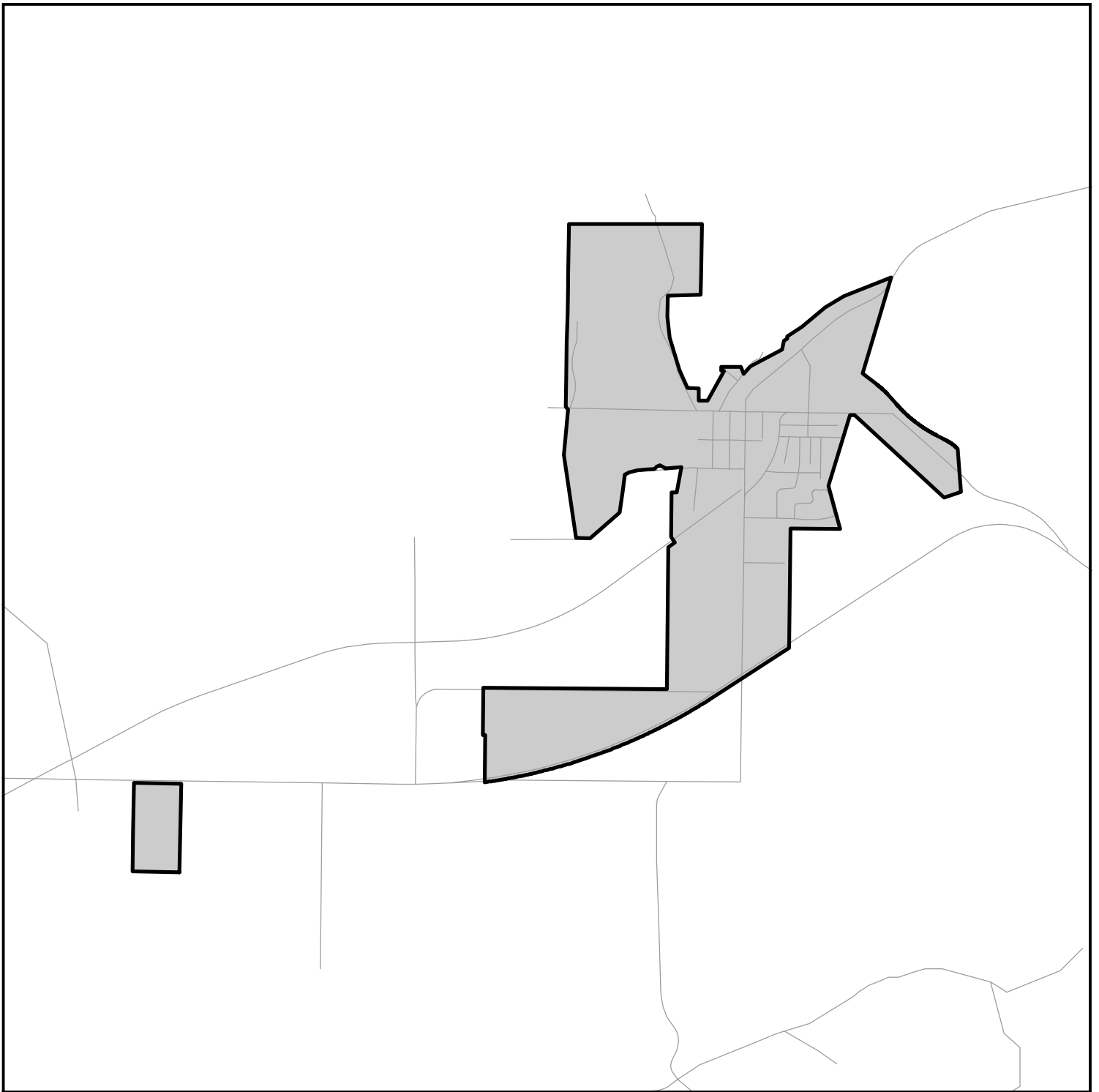
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**LEGEND**

-  Ventura County Waterworks #16 Sphere
-  Ventura County Waterworks #16

## Ventura LAFCO Ventura County Waterworks #16

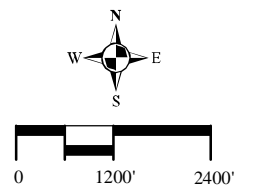


Figure V.11

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In the Santa Clara River watershed service review area, five of the ten agencies (City of Port Hueneme, Ocean View MWD, United Water CD, CSA #30 and Waterworks District #16) had no special studies areas and updating the SOIs for these agencies should not require extensive analysis. Three of the five remaining agencies—City of Oxnard, Channel Islands CSD and the Fox Canyon GMA—have special study areas or possible SOI changes identified and updating SOIs for these agencies is not expected to require extensive analysis. The special study areas identified for the City of Oxnard are primarily discrepancies between the City's existing SOI and its adopted CURB as well as potential areas of annexation. The Channel Islands Beach CSD boundaries encompasses the water portions of the Channel Islands Harbor; during development of the harbor some areas were filled and have been developed but were never removed from the CSD's district boundaries. These areas have been labeled as special study areas. Finally, the Fox Canyon GMA has some possible areas of adjustment to their SOI.

The special study areas for the Cities of Fillmore and Santa Paula are similar to other municipalities with voter approved urban limit lines. There were discrepancies between the CURB/SOAR limits and the previously adopted LAFCO SOI and it has been one of the goals of this service review to map such areas where the two lines may not coincide.

- For the **City of Fillmore** there are special studies areas noted along their boundaries where the SOI exceeds the CURB line or where the CURB is larger than the existing SOI. Updating the SOI for a majority of these areas is not expected to require an extensive level of analysis on the part of the LAFCO staff.

However, along the southern boundary, there are areas, which are within the City and CURB but outside the adopted SOI. There are some service provision issues since these areas are either in or across the Santa Clara River and providing urban level services may be difficult or unnecessary due to land uses and development patterns. It is expected that due to the location of these special study areas, to the present and planned land uses and to the present and planned need for municipal services, the areas south of the City of Fillmore may require more analysis on the part of the LAFCO staff to determine if detachment is needed.

The issue of adequate services, in particular the provision of wastewater service, is significant when updating the SOI. There is adequate capacity to serve the proposed annexation and Heritage Valley development. However, for subsequent annexations to occur, the City would have to ensure that there is adequate wastewater capacity provided concurrent with need. The suggested realignment of the City's CURB and SOI would also require a recalculation of the development potential within the SOI in relation to wastewater service; the areas excluded from the SOI would not require wastewater service while areas added to the SOI might place additional demands of the limited capacity of the current wastewater plant. The infrastructure deficiencies in terms of wastewater service have been described in Section VI, Infrastructure.

- For the **City of Santa Paula**, there are only two main areas labeled as special study areas. The first is located in the southwestern portion of the City. There are parcels located within the SOI and CURB but outside the City and a larger area inside the SOI but outside the CURB. In the City's map of its "Amended CURB Line" portions are labeled as an "expansion area" and as "West Area 2". The portions in the City's CURB and SOI are designated for light industrial and research and development land uses. However, there are some areas located outside the CURB and still within the SOI where land ownership and

possible development plans may overlap with the areas inside the CURB. Analysis of these issues may require additional LAFCO time and effort.

The second special study area is Adams Canyon, an approximately 5,500-acre area located to the northeast of the City. Adams Canyon is within the City's existing SOI but is outside the voter approved CURB. It is labeled as an "expansion area" on the City's map of its amended CURB contained in the General Plan. The City's General Plan envisions 1,980 single family and 270 multi-family units, 150,000 square feet of neighborhood commercial uses, 34 acres of parks, 380 acres of hotel/golf courses uses and 220 acres of open space. Beyond the boundaries of Adams Canyon the Cities of Santa Paula and San Buenaventura have a greenbelt agreement; generally land included within a greenbelt agreement is outside a city's SOI.

If development of Adams Canyon occurs, the most logical provider of urban level services would be the City of Santa Paula. Development in the County, if permitted under the "Guidelines for Orderly Development" could result in significant impacts to the City of Santa Paula. However, as noted in the preceding discussion regarding the City of Fillmore, the adequacy and availability of all urban level services; in particular wastewater should be determined by LAFCO when updating the SOI and prior to approving any annexation. Therefore this area has been labeled as a special study area and it is suggested that during SOI updates that the City provide enough data to Ventura LAFCO so the Commission can be assured that services will be provided concurrent with need.

It should also be noted that the City is working with landowners and developers on future plans for the Fagan Canyon, which is located with the City's SOI and CURB. When an annexation application is submitted, it is expected that the City of Santa Paula would also provide data to the Ventura LAFCO Commission regarding the capacity of their wastewater plant.

- It is also suggested that Ventura LAFCO consider adopting a policy for "zero" sphere of influence designations and consider applying that designation to the **Channel Islands CSD**. There has been a considerable history of discussion about the provision of service to the communities served by the CSD. Generally the issues could be classified as possible boundary adjustments, service provision and the various governmental structure options.

The boundary issues are relatively simple. In the 1972 "Special Districts" study it was recommended that the City of Oxnard initiate proceedings to detach overlapping areas (areas within both the City of Oxnard and the District) from the Channel Islands Beach Water District. It was also recommended that upon annexation to the City that areas be detached from the Channel Islands CSD.

However, the Channel Islands CSD only serves the developed portions of the Channel Islands Harbor. In the 1972 study it was also recommended that the Board of Supervisors detach the water areas of the Channel Islands Harbor from the District. During the course of this service review, areas that were developed and should be within the District or areas that constitute the water portions and should be detached from the District have been mapped and labeled as special study areas. The areas were created primarily by the continued development of the Harbor since the previous SOI update.

Service provision issues are more complicated. The Channel Islands CSD provides trash, water and wastewater service. Trash is provided by a contract with a private hauler. Water

is provided by the Port Hueneme Water Agency; the CSD distributes the water. While the District's water distribution system had had fire flow and other problems in the past, it is now interconnected with the Cities of Oxnard and Port Hueneme.

The Cities of Oxnard and Port Hueneme provide wastewater services to the District; flows from the District are transported to the Oxnard treatment plant through the two Cities. Recently the City of Port Hueneme took legal steps to end its agreement with the District for operation of wastewater services. The District currently does not have enough staff to operate the system and it is currently investigating the possibility of contracting with the Ventura Regional Sanitation District for operation of the system. However, economic considerations may reach a tipping factor. As with all wastewater providers, the cost of increased water quality regulations may, at some point in the future, make the provision of wastewater service economically infeasible for smaller agencies.

The Port Hueneme Water Agency is currently considering participation in the GREAT program, which would further regionalize water services and may duplicate the current services provided by the Port Hueneme Water Agency. In addition, the status of past agreements of the District with both the City of Port Hueneme and Oxnard regarding the provision of both water and wastewater services is uncertain and without the Port Hueneme Water Agency and existing agreements, it could become prohibitive for the Channel Islands CSD to directly provide water service.

It would seem that service provision would be simplified and cost savings occur if the services of Channel Islands Beach CSD would be provided by other agencies. Since the Channel Islands CSD is completely surrounded by the Cities of Oxnard and Port Hueneme, the Cities would be the logical successor agencies.

However, the Channel Islands CSD serves an unincorporated area that has expressed little interest in annexing to either municipality. Some residents have complained about higher rates and other actions of the Channel Islands Beach CSD Board; other customers have expressed concerns about annexation to either City as well as the loss of community character. Since annexations can be terminated by a majority of residents, it would seem impractical for Ventura LAFCO to initiate a reorganization of the Channel Islands Beach CSD until such time as residents initiate reorganization or until a consensus among residents is clearly evident.

Therefore, it is suggested that a zero SOI be adopted for the Channel Islands Beach CSD. In the short-term a zero SOI would have little impact on the agency since minor growth or annexation to the District is expected. However, a zero SOI would indicate to all the agencies and residents involved that at some point in the future, when financial, service or other issues reach the tipping point, that the Channel Islands Beach CSD should be reorganized with another agency. It is further suggested that if the Ventura LAFCO Commission adopts a zero SOI for the Channel Islands Beach CSD and that the SOIs for the Cities of Port Hueneme and Oxnard be revised to include the District's territory.

Addressed in Section V.9 Government Structure Options, is the issue of the future governmental structure for the Ocean View MWD, which should be considered by LAFCO prior to updating its SOI. In that section of this service review report, it is suggested that Ventura LAFCO consider dissolving the Ocean View MWD and assign its responsibilities to another agency.

Finally, agencies answering the service review questionnaire reported well-established budget processes and procedures, which use internal cost/benefit studies to find and utilize opportunities to reduce or avoid costs. As part of the questionnaire, agencies were asked to note services that were currently provided by other agencies or private contractors, the estimated annual cost savings and excess capacity, facilities or staff that could be made available. Table V.10, Summary-Use of Contractors, illustrates each agency's use of outside contractors.

TABLE V.10 SUMMARY – USE OF CONTRACTORS

	SERVICES PROVIDED BY PRIVATE CONTRACTORS	SERVICES PROVIDED BY OR TO OTHER AGENCIES	ESTIMATED ANNUAL COST SAVINGS	EXCESS CAPACITY, FACILITIES OR STAFF
City of Fillmore	Operation of wastewater treatment plant; cleaning of pipes	None Reported	\$75,000	None
City of Oxnard	None Reported	Service agreements for water and wastewater services to other agencies; painting by VRSD	None Reported	None Reported
City of Port Hueneme	Some sampling	JPA with City of Oxnard (regional treatment plant); service agreement with Channel Islands Beach CSD and Navy; sharing of pipes, pumps and maintenance equipment.	None Reported	None
City of Santa Paula	Wastewater treatment plant management	JPA for insurance	None Reported	None Reported
Channel Islands Beach CSD	Emergency water system repairs	JPA—Port Hueneme Water Agency; service agreement with Ventura County for water provision to the Channel Island Harbor; service agreement with city of Oxnard for water and wastewater service to the Channel Island Harbor and surrounding areas; ACWA insurance; member of County Emergency Operations Area; agreement with City of Port Hueneme to provide operations and maintenance of wastewater system	None Reported	None Reported
Fox Canyon GMA	None Reported	None Reported	None Reported	None Reported
Ocean View MWD	Legal, accounting and financial services	None Reported	None Reported	None Reported
United Water CD	None Reported	Billing and collection; service agreement with City of Oxnard for maintenance	None Reported	None Reported
CSA #30	As needed and through Ventura County bidding process	Ventura County self-insurance pool and other services; agreement with City of Oxnard	None Reported	None Reported
Waterworks #16	As needed and through Ventura County bidding process	Shares services and facilities with Ventura County; agreement with Ventura Regional SD	None Reported	None Reported

## V.7 RATE RESTRUCTURING

The service review questionnaire asked agencies to list current rates for water and wastewater service, rates changes in the previous two years, anticipated rate changes and any difference in rates charged to customers outside agency boundaries. Three agencies (City of Fillmore and Oxnard and Waterworks District #16) reported rate increase during the past two years of 6%-10%; they also anticipated rate increase during the next two years of 10%-20%. Two agencies (City of Port Hueneme and the Ocean View MWD) did not increase rates in the previous two years but both expect rates to increase by during the next two years. The Channel Islands CSD noted no rate changes during the previous two years and reported not expecting to raise rates during the next two years. Two agencies, the City of Santa Paula and CSA #30, did not answer the question.

The agencies were also asked to list current rates in terms of million gallons per day (mgd) and acre-feet, for wastewater and water respectively, in order to have a uniform basis of comparing rates from diverse agencies. Using mgd for wastewater service rates did not yield useful information. Therefore the State Water Resources Control Board "Wastewater Users Survey Report" was used to develop Table V.11, Wastewater Agency Rates, and provide a comparison of the rates of the wastewater agencies in the Santa Clara River watershed service review area.<sup>9</sup>

Table V.11  
 Wastewater Agency Rates

AGENCY	MONTHLY USER CHARGE	CONNECTION FEE
City of Fillmore	\$13.92	\$4,280
City of Oxnard	\$21.88	\$3,539
City of Port Hueneme	\$16.50	\$3,000
City of Santa Paula	\$11.35	\$618
Channel Islands Beach CSD	\$21.00	\$5,610
CSA #30	\$38.70	\$3,939
Waterworks District #16	\$21.47	\$500

Table V.12  
 Water Rates

AGENCY	WATER PER AF
City of Fillmore	None Reported
City of Oxnard	\$788*
City of Port Hueneme	\$641
City of Santa Paula	None Reported
Channel Islands CSD	\$1,093/res \$1,103/com
Fox Canyon GMA	\$3.00
Ocean View MWD	\$250
United Water CD	Referred to Fee Ordinance
Waterworks #16	\$516

Table V.12, Water Rates, includes a partial comparison of rates per acre-foot as requested by the service review questionnaire. No data has been included for the Fox Canyon Groundwater whose rates are set by its enabling legislation at \$3.00 per AF of groundwater pumped.

Using acre-feet for a comparison of water rates is not the typical means of comparing water rate information and did not yield useful information. However, comparing the various rate ordinances among the agencies is difficult and does not permit the average citizen to have a meaningful evaluation of their current rates as compared to other agencies.

Since the agencies differ in the billing period (monthly, bimonthly or quarterly), the unit of measurement used to calculate rates, the rate structure (flat or tiered rates), connection fees, the class of user (residential, agricultural and industrial/commercial), the database is being

<sup>9</sup> State Water Resources Control Board "Wastewater User Survey Report, FY 2001-2002" May 2002.



revised to reflect the variability among the agencies while still permitting a meaningful comparison of costs for the benefit of the public, the elected officials and the agencies. Table V.13, Water Rate Comparison, was developed using the revised format being considered by the Ventura LAFCO staff. The Cities of Fillmore and Santa Paula did not provide copies of their rate schedules. The United Water CD has different pumping charges for each of its three service areas and associated pipelines; it was not possible to determine costs per acre-foot since the demand for water for different types of agriculture varies.

Table V.13  
Water Rate Comparison

	1" Meter/Service Charge (residential)	Water Usage (residential/HCF)	1" Meter Connection Fee	Estimated Monthly residential Water Bill*
<b>City of Fillmore</b>	None Reported	None Reported	None Reported	None Reported
<b>City of Oxnard</b>	\$9.33	0-6 HCF/Mo. \$1.178 6-12 HCF/Mo. \$1.292 Over 12 HCF/Mo. \$1.824	\$6,265**	\$58.53*
<b>City of Port Hueneme</b>	\$32.90 (meter) \$13.16 (unmetered)	\$1.47 HCF	\$25.00 initial deposit	\$85.82* (metered) \$37.15* (unmetered)
<b>City of Santa Paula</b>	None Reported	None Reported	None Reported	None Reported
<b>Channel Islands Beach CSD</b>	\$37.44	0-3 HCF/Mo. \$1.45 4-16 HCF/Mo. \$2.02 17 and over HCF/Mo. \$2.53	None Reported	\$79.68*
<b>Waterworks #16</b>	\$48.58	\$0.947	Actual Cost	\$82.67*

\* Estimated water use for a family of five—one af/year; excludes irrigation use. Actual bills may vary depending on size of agency, land uses and other factors.

\*\* For new service/meter as part of GREAT program

## V.8 OPPORTUNITIES FOR SHARED FACILITIES

As part of the service review questionnaire, agencies were asked to identify ways that they currently cooperate with other agencies to maximize opportunities for sharing facilities. Agencies were asked to list current joint activities with other agencies, which are shown in Table V.14, Joint Service Agreements. For the 10 agencies within the Santa Clara River watershed service review area, Table V.14, Joint Service Agreements, and the subsequent discussion summarizes joint activities which increase opportunities for shared facilities.

The 1999-2000 Ventura Grand Jury report recommended that the Ventura County Clerk maintain a list of JPAs operating within Ventura County. The database designed by Ventura LAFCO has a list of JPAs reported by the water and wastewater agencies.

TABLE V.14  
JOINT SERVICE AGREEMENTS

AGENCY	JOINT AGREEMENTS NOTED
City of Fillmore	Uses private contractors for operation of wastewater treatment plant and cleaning of pipes; exploring regional wastewater treatment plant with the City of Santa Paula
City of Oxnard	Numerous service agreements with other agencies; GREAT Program (see below); contracts with Ventura Regional SD for painting
City of Port Hueneme	JPA with City of Oxnard for regional treatment plant; service agreement with Channel Islands Beach CSD and Navy; equipment sharing; private contractors for some sampling and lab work; Port Hueneme Water Agency.
City of Santa Paula	JPA for self-insurance; service agreements and purchasing pools
Channel Islands Beach CSD	JPA with Port Hueneme Water Agency; service agreement with Ventura County for provision of water to harbor and with Oxnard for water/wastewater to harbor and surrounding areas; insurance pools with ACWA/JPIA; private contracts for water system repairs; City of Port Hueneme provides operation/maintenance to for wastewater
Fox Canyon GMA	None reported
Ocean View MWD	Service agreement with City of Oxnard for maintenance; contracts for legal, accounting, financial reporting, billing and collection.
United Water CD	GREAT program; cost sharing programs with other agencies
CSA #16	Shared services and staff and insurance through Ventura County; service agreement with City of Oxnard.
Waterworks District #30	Some shared services and staff through Ventura County; service agreement with Ventura Regional SD for operations and maintenance.

The agencies within the Santa Clara River watershed service review area also participate in several formal sharing arrangements. The first is the Hueneme Water Agency (PHWA), a Joint-Powers Agency (JPA) that provides wholesale water to the City of Port Hueneme, NBVC Construction Battalion Center and Point Mugu, and the Channel Islands Beach Community Services District.

Another program encouraging a more regional approach to service delivery is the Groundwater Enhancement and Treatment (GREAT) Program which was developed by the City of Oxnard to address regional water needs. Participating agencies in the GREAT Program and other regional programs include the City of Oxnard, the Port Hueneme Water Agency (PHWA), the wholesale supplier for the City of Port Hueneme, the Channel Islands Community Services District and two Naval bases, the United Water Conservation District (UWCD), the Fox Canyon GMA and the Calleguas Municipal Water District (CMWD). GREAT has three major objectives:

- The construction of a new, regional groundwater desalination facility to serve Oxnard and Port Hueneme Water Agency
- The building of a recycled water system to serve agricultural water users in the Pleasant Valley area and protect water sources against seawater intrusion
- Conveying desalination concentrates through a new brine line to enhanced wetlands in the Ormond Beach area.

In 1996 the PHWA, which serves a portion of the service review area, implemented a program to meet its water supply requirements and improve water quality. This program allows for the conjunctive use of desalinated groundwater provided by the United Water CD and imported

water provided by the Calleguas MWD. A major component of the program is a 3 mgd Brackish Water Reclamation Demonstration Facility (BWRDF), which desalinates local groundwater supplied by United Water CD. The PHWA is currently planning its expansion in cooperation with the Calleguas MWD.

To manage groundwater extractions from the Oxnard Plain aquifers, the Fox Canyon GMA has been implementing staged reductions in the allowable amount of pumping by groundwater users, including the United Water CD and Oxnard. To date, reductions of fifteen percent (15%) from 1985-1989 pumping levels have been implemented and two additional five percent (5%) reductions are scheduled for 2005 and 2010. Even with these reductions of groundwater extractions, localized problems, including severely depressed groundwater levels in the Pleasant Valley area remain to be addressed. Imported water deliveries are also approaching the limits of the Calleguas MWD's delivery system and costly capacity expansions will be necessary.

As part of the GREAT Program, it has been agreed among the participating agencies that groundwater for the desalination facility will be supplied by the United Water Conservation District through its Oxnard-Hueneme Pipeline. Pumping allocations for the additional groundwater extractions will be obtained by the Fox Canyon GMA through the exchange of recycled water deliveries for agricultural pumping allocations and/or groundwater injection credits gained as part of the seawater intrusion barrier element. Desalinated water will be supplied to Oxnard and the PHWA through the existing water delivery system. Desalination concentrates will be conveyed through a new brine line to proposed wetlands to be constructed as part of Calleguas MWD Regional Salinity Management and Wetlands Enhancement Program.

Recycled water will be obtained from the Oxnard Wastewater Treatment Plant. Filtration and improved disinfection facilities will be constructed to allow direct use of recycled water for landscape irrigation and agricultural irrigation of certain crops. In addition, because the PHWA will receive high quality water from the proposed regional groundwater desalination facility, the three (3) million gallons per day Brackish Water Reclamation Demonstration Facility will be converted to recycled water use to allow aquifer recharge during winter months (i.e., non-irrigation period). Recharged water could then be extracted during the summer months for agricultural irrigation of crops with higher water quality requirements. Aquifer recharge will also reduce saltwater intrusion by balancing injection and extraction.

## **V.9 GOVERNMENT STRUCTURE OPTIONS**

Functional reorganizations within agencies, amending or updating SOIs and other changes in the jurisdictional boundaries of the water and wastewater agencies were noted in Section VIII, Cost Avoidance Opportunities. This section addresses efficiencies that might be gained through other governmental structure options.

The initial step in evaluating governmental structure options was a review of recommendations from the Ventura LAFCO "Special Districts" studies from the years 1973, 1985, 1993 and 2001. These recommendations are included in this service review report as information about potential government structure options considered by Ventura LAFCO in the past. The purpose of the service review is to list all possible government structure options, if any, that the Ventura LAFCO Commission may want to examine in more depth in the future.

Table V.15, 2001 Ventura LAFCO Special District’s Study, summarizes the recommendations from the previous “Special District” studies. In the service review responses, none of the agencies reported having submitted or been included in a reorganization proposal before Ventura LAFCO within the previous two years.

TABLE V.15  
2001 VENTURA LAFCO SPECIAL DISTRICT STUDY

AGENCY	RECOMMENDATIONS
City of Fillmore	None noted
City of Oxnard	None noted
City of Port Hueneme	None noted
City of Santa Paula	None noted
Channel Islands Beach CSD	See discussion Section V.6, Cost Avoidance Opportunities
Fox Canyon GMA	None noted
Ocean View MWD	1972 and 1985 studies recommended dissolution
United Water CD	None noted
CSA #30	None noted
Waterworks District #16	None noted

One of the purposes of the service review is to list all possible government structure options including advantages and disadvantages of potential reorganizations. For this purposes of this service review report, a reorganization is defined as two or more changes of organization (i.e., consolidation, merger, dissolution, annexation and/or detachment) which are initiated in a single proposal before LAFCO.

**a) Ocean View Municipal Water District**

In the 1973 Ventura LAFCO Special Districts Study, the Ocean View MWD was identified as one of the “defensive” districts ostensibly formed in the 1960s as a means of preventing the expansion of the Calleguas MWD. While some of the conclusions in the 1973 report were contradictory (the agency’s sole function was to retire bonded debt; the agency was formed to prevent saltwater intrusion), the conclusion was that the Ocean View MWD should be dissolved. The study noted that in 1967 the District, the United Water CD and the City of Oxnard entered into an agreement that allowed the City of Oxnard to purchase the pipeline. The United Water CD was a party to the agreement since the water is obtained for agricultural uses and at special rates. The bonded indebtedness was retired in 1992.

In 1985, the “Special Districts” study reinforced the recommendation that the Ocean View MWD be dissolved or consolidated but added that it might be appropriate for the change in governmental structure to be delayed until the bonded indebtedness was retired. No recommendation was included in the 1993 study.

The District currently serves approximately 50 customers located along Hueneme Road with agricultural water. It is suggested that the Ventura LAFCO Commission initiate proceedings to

dissolve the Ocean View MWD. The City of Oxnard and the United Water CD are two possible successor agencies.

Portions of the Ocean View MWD are in and adjacent to the City of Oxnard and the City owns the pipeline serving the area. However, the City's ability to annex the service area of the Ocean View MWD may be limited by its CURB boundaries and limitations. Government Code Section §56133 states that a city can provide new or extended services by contract outside its jurisdictional boundaries if approved by the LAFCO Commission. The LAFCO Commission can also approve a contract for extending services outside an agency's jurisdictional boundaries and SOI if there is a threat to public health and safety. However, if the contract includes the transfer of untreated or non-potable water or only involves the provision of surplus water to agricultural lands including incidental residential structures, LAFCO is not required to approve the contract. Therefore, the City of Oxnard might be able to extend service to the service area of the Ocean View MWD through a contract; it is uncertain if LAFCO approval of the contract would be needed. The Ventura LAFCO Commission could also consider the United Water CD as another potential option as the successor agency to the Ocean View MWD.

## **V.10 EVALUATION OF MANAGEMENT EFFICIENCIES**

Reviewing management efficiencies has generally been an internal activity of a public agency with limited oversight by external entities such as state/federal regulatory agencies or a Grand Jury. The OPR service review guidelines suggested factors that could be used when evaluating management efficiencies, but many of them relate to internal practices which are difficult to measure and whose correction is outside of LAFCO's authority. Factors that the OPR Guidelines recommend for evaluating management efficiencies were included in the Ventura LAFCO questionnaire and have been addressed in other sections of this report. In addition, data was collected about master plans, recent litigation and/or Grand Jury inquiries and number of employees as a means of evaluating management efficiencies.

The presence of master plans, as described in Section VI, Infrastructure, can be an indication of managerial efficiency in assessing long range planning needs. However, some small agencies or those close to built-out may use other means of predicting and preparing for long-term service needs such as a CIP.

Frequent litigation or inclusion in a Grand Jury report can also be used as a proxy measure for managerial efficiency. If an agency is frequently involved in litigation, it can indicate that the staff and/or Board resort to the courts for resolution of issues, which might be addressed through other less expensive means. Occasionally inclusion in a Grand Jury investigation might mean that complaints about the agency have been received.

Of the ten agencies within the Santa Clara River watershed service review area only one, the City of Santa Paula, noted being the subject of a Ventura County Grand Jury investigation. The Grand Jury in 1999-2000 examined the updated of the City's SOI and focused on the role of LAFCO. No significant conclusions regarding the City of Santa Paula were noted.

In 1999-2000, the Grand Jury also examined the Channel Islands Beach CSD to determine if the agency could be eliminated or annexed to another agency, to determine if the rates charged by the Channel Islands Beach CSD were fair to all customers and to determine the impact of a contract between Ventura County and the Channel Islands Beach CSD.

Two agencies, the United Water CD and the Channel Islands Beach CSD, noted that their agencies had been involved in litigation within the previous two years. The Channel Islands Beach CSD only cited a court case, County of Ventura CV 217391, City of Port Hueneme vs. Channel Islands Beach CSD, but did not provide specific information. None of the litigation cited by the United Water CD directly involved the provision of service.

Agencies were also asked to report the number and categories of employees dedicated to the provision of service. In the 1999-2000 Grand Jury report, "An Examination of Special Districts Providing Water Service to Ventura County" the Grand Jury used an agency's administrative expense as a percentage of the operating revenue for the district. The Grand Jury's report noted that:

*"Most districts enjoy administrative overhead percentages of less than 15%....dependent districts enjoy low overhead through their sharing of management, facilities and staff. Smaller, independent districts, however, pay the largest overhead penalty."*

The service review questionnaire did not specifically request that agencies provide data on administrative overhead percentages although it is suggested that future service reviews collecting this data as a means of analyzing management efficiency. If future service reviews continue to require an assessment of management efficiencies, Ventura LAFCO might also consider developing performance measures or benchmarks to allow for a meaningful comparison of management practices and efficiencies among diverse agencies.

As another means of assessing managerial efficiencies, Table V.16, Employee Information, provides the number of administrative, professional/support and operational employees and the ratio of the number of professional/support/operational employees to administrative staff. For the agencies reporting the ratio of administrative staff to professional/operational, ratios were similar.

Cities and dependent districts (districts governed by a City Council or a Board of Supervisors) were asked the amount of money transferred from the enterprise fund to the General Fund. Some municipalities transfer a portion of enterprise funds to the General Fund to cover administrative expenses. Proposition 218 and subsequent legal opinions have discouraged these transfers unless there is a clear nexus between the transfer and the cost of services. Most public agencies have completed these nexus studies.

Using information provided by three of the four cities, an average of the percent of enterprise funds transferred to the General Fund for the past three fiscal years was determined. It should be noted, however, that the service review questionnaire did not ask the agencies to specify the use of the transferred funds; transferred funds may be used for other purposes than to cover administrative expenses.

Of the four cities in the Santa Clara River watershed service review area, the City of Fillmore did not respond to the question and it is unclear if no funds were transferred or if the question was not answered. The City of Oxnard transferred an average of 15% of their enterprise funds to the General Plan, the City of Port Hueneme approximately 20% and the City of Santa Paula 6%.

TABLE V.16  
EMPLOYEE INFORMATION

	RATIO OF EXECUTIVE STAFF TO PROF. AND OPER.	WATER			WASTEWATER		
		EXECUTIVE AND MGT.	PROF. AND SUPPORT.	OPERATIONAL	EXECUTIVE AND MNGT.	PROF. AND SUPPORT.	OPERATIONAL
City of Fillmore	1:3	2	1	5	2	1	Contract Staff
City of Oxnard*	1:14	5	4	32	*	*	*
City of Port Hueneme	1:5 w 1:13 ww	1	1	4	1	3	10
City of Santa Paula	1:9	2	5	13	None Reported	None Reported	None Reported
Channel Islands Beach CSD	1:1	3	0	4	3	3	Contract Staff
Fox Canyon GMA	1:4	0.5	2	0			
Ocean View MWD	NA	0	0	0			
United Water CD	1:4	8	12	24			
CSA #30*	1:6 w 1:4 ww	6	18	20	6	18	7
Waterworks #16*	1:6 w 1:4 ww	6	18	20	6	18	7

\*City of Oxnard reported a total of 67 wastewater employees but did not provide a breakdown into categories

\*\*Staff shared with other CSAs and/or Waterworks entities

## V.11 LOCAL ACCOUNTABILITY AND GOVERNANCE

Generally no significant issues regarding local accountability and governance were noted for any of the agencies within the Santa Clara River watershed service review area. The governing boards of the agencies appear to be locally accountable through adherence to applicable government code sections, open and accessible meetings, dissemination of information and encouragement of participation in their election process. Only two of the agencies (Channel Islands Beach CSD and the Ocean View MWD) do not have websites; the two dependent agencies (CSA#16 and Waterworks District #30) use the Ventura County website. It is suggested that the Channel Islands Beach CSD develop a website to increase dissemination of information, compliance with environmental justice issues and accountability to customers. The Ocean View MWD is a small water agency serving 50 customers and developing a website would not seem practical.

All agencies did note that copies of the budget are made available to the public. Eight of the ten agencies reported unqualified audits in 2002. The Cities of Fillmore and Santa Paula both noted that their latest audits were qualified due to listing of fixed assets. This type of qualification in audits for public agencies happens as public agencies implement the Governmental Standards Accounting Board directive 34 (GSAB 34), which established a whole new framework or "financial reporting model" for state and local governments.

The service review questionnaire asked each agency to provide current information about the governing board, the expiration date of each member's term and whether any recently elected governing board members ran unopposed. This information was entered into the database and will be used to maintain current and accurate information. Data about compensation, review

sessions of the Brown Act/FPPC requirements and violations of either regulation within the previous two years was collected.

In addition, agencies were asked to indicate if the governing body was elected or appointed, whether recently elected officials ran unopposed and to provide the amount of compensation set for elected officials. Only two agencies, the Fox Canyon Groundwater Management Agency and the Ocean View MWD, have Board members that are appointed. The Fox Canyon GMA has five board members chosen, one by each of the following: (1) Ventura County; (2) United Water Conservation District; (3) the cities that at least partly overly the Fox Canyon basin; (4) the special districts and mutual water companies that at least partly overly the Fox Canyon Basin; (5) by the other four members. The Channel Islands Beach CSD reported that three board members ran unopposed.

A majority of the agencies reported that regular review sessions of the requirements of the Brown Act, FPPC and public disclosure laws were scheduled; a few agencies noted that sessions were scheduled on an as-needed basis. None of the agencies noted any violations within the previous two years.

Public access was evaluated by regularly scheduled meetings and locations, by compliance with ADA and by the use of legally required notices. All agencies reported that their meeting locations were in compliance with the requirements of ADA and listed the legally required means of giving notice of meetings.

The final OPR Service Review Guidelines suggested that to satisfy environmental justice concerns agencies hold meetings at a time and place that maximize public participation. A majority of the agencies within the Santa Clara River watershed service review area hold meetings after normal working hours. Four agencies (Fox Canyon GMA, United Water CD, CSA #16 and Waterworks District #30) schedule their governing body meetings during normal working hours. Only the Ocean View MWD does not hold regularly scheduled Board meetings; meetings are scheduled on an as-needed basis.

Compensation of elected and appointed officials reported is shown in Table V.17, Compensation for Elected Officials:



TABLE V.17  
COMPENSATION FOR ELECTED OFFICIALS

	BASIC STIPEND	LIMIT ON STIPEND	BENEFITS	OTHER
City of Fillmore	None Reported	None Reported	None Reported	None Reported
City of Oxnard	None Reported	None Reported	None Reported	None Reported
City of Port Hueneme	\$682/month	None Reported	Life, medical, dental (\$626/month for benefits) PERS	None Reported
City of Santa Paula	\$300/month	\$300/month	Life, medical, dental (\$626/month for benefits) PERS	\$1,000 limit per fiscal year on travel
Channel Islands Beach CSD	\$100/month	\$600/month	Worker's Comp.	Travel-\$0.36/mile and actual costs
Fox Canyon GMA	0	0	0	0
Ocean View MWD	\$50/mtg	0	0	0
United Water CD	\$115.75 mtg	10 mtgs per month	0	Travel costs according to agency's "Expense reimbursement Policy"
CSA #16*	\$7,083	*	*	*
Ventura County Waterworks #30*	\$7,083	*	*	*

\*Compensation for Board of Supervisors; no additional compensation for acting as governing body for dependent district



**APPENDIX A**

**FINANCIAL SUMMARIES**



District Name: Calleguas Municipal Water District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$72,036,110	\$74,030,668	\$63,630,265
Expenses:	\$64,904,730	\$67,874,855	\$59,000,000
Capital Improvements:	\$16,706,178	\$23,386,906	\$44,000,000
Reserves:	\$39,050,433	\$40,304,342	\$41,400,000
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	
Special Taxes:	\$0	\$0	
Service Charges:	\$63,791,365	\$65,842,170	\$54,330,265
Fees:	\$2,751,667	\$2,748,516	\$2,750,000
Assessments:	\$4,238,707	\$3,935,776	\$5,100,000
Stand-by Charges:	\$1,254,371	\$1,393,708	\$1,450,000
Grants:	\$0	\$0	\$0
Other: (Misc. offsets)	\$0	-\$110,498	\$0
<b>Reserves</b>			
Operating Reserves:	\$39,050,433	\$40,304,342	\$41,400,000
Capital Reserve Fund:	\$65,885,780	\$54,259,996	\$18,000,000
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$104,936,213	\$94,564,338	\$59,400,000
Total Reserves as % of Total Revenue:	146%	128%	93%

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

**Bond Summary**

Current Bond Rating: AAA  
 Source: Moody's and Standard & Poor's

Notes:

Calleguas categorizes Operating Revenue sources as follows:

	2000-2001	2001-2002	2002-2003
Water Sales	\$61,929,603	\$64,738,989	\$53,185,039
Pumping Power Revenue	\$509,118	\$646,881	\$679,800
Readiness to Serve	\$2,751,667	\$2,748,516	\$2,750,000
Capital Construction Charge	\$4,238,707	\$3,935,776	\$5,100,000
Water Standby Charge	\$1,254,371	\$1,393,708	\$1,450,000
Power Sales	\$1,352,644	\$456,300	\$465,426
Misc./Offsets	\$0	-\$110,498	\$0
Total:	\$72,036,110	\$73,809,672	\$63,630,265

\* \$18,000,000 does not reflect planned bond issue.

District Name: Camarillo Sanitary District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$7,135,078	\$7,133,100	\$7,259,950
Expenses:	\$5,736,350	\$6,675,091	\$6,574,071
Capital Improvements:	\$1,267,080	\$162,952	\$52,850
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$658,750	\$689,050	\$719,750
Special Taxes:	\$0	\$0	\$5,037,200
Service Charges:	\$4,856,400	\$4,897,800	\$603,000
Fees:	\$619,928	\$876,250	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$1,000,000	\$670,000	\$900,000
<b>Reserves</b>			
Operating Reserves:	\$2,817,169	\$3,371,798	\$3,540,388
Capital Reserve Fund:	\$11,056,493	\$12,491,140	\$10,323,761
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$1,318,082	\$1,262,482	\$1,253,334
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$15,191,744	\$17,125,420	\$15,117,483
Total Reserves as % of Total Revenue:	213%	240%	208%

**Bond Summary**

Current Bond Rating: A+  
 Source: Standard & Poors (as of 1-1-1999)

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Camrosa Water District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$10,496,800	\$10,675,220	\$11,404,500
Expenses:	\$9,923,118	\$10,111,511	\$9,692,741
Capital Improvements:	\$737,000	\$1,401,000	\$1,542,000
Reserves:	\$13,024,652	\$11,190,417	\$10,013,626
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$622,500	\$634,950	\$350,000
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$8,664,300	\$8,950,270	\$9,344,500
Fees:	\$330,000	\$330,000	\$330,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$880,000	\$760,000	\$380,000
<b>Reserves</b>			
Operating Reserves:	\$0	\$0	\$0
Capital Reserve Fund:	\$10,402,176	\$10,420,432	\$8,408,626
Operating and Rate Stabilization Fund:	\$0	\$0	\$250,000
Restricted Debt Reserves:	\$2,622,476	\$769,985	\$1,355,000
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$13,024,652	\$11,190,417	\$10,013,626
Total Reserves as % of Total Revenue:	124%	105%	88%

**Bond Summary**

Current Bond Rating: A2      A+  
 Source: Moody's      Standard & Poors

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Casitas Municipal Water District

**Financial Summary**

	<b>2000-2001</b>	<b>2001-2002</b>	<b>2002-2003</b>
Revenues:	\$9,073,980	\$11,437,287	\$14,150,685
Expenses:	\$5,412,900	\$5,860,618	\$6,413,956
Capital Improvements:	\$6,657,360	\$14,373,004	\$12,586,706
Reserves:	\$12,996,280	\$ (8,796,335)	\$ (4,849,977)
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$1,011,000	\$880,000	\$1,090,000
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$60,000	\$5,872,037	\$117,460
Fees:	\$1,857,075	\$1,759,650	\$1,967,500
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$1,077	\$2,925,600	\$4,797,227
*Other:	\$5,068,683	\$0	\$6,178,498
<b>Reserves</b>			
Operating Reserves:	\$2,500,000	\$2,500,000	\$2,500,000
Capital Reserve Fund:	\$478,111	\$636,089	\$636,089
Operating and Rate Stabilization Fund:	\$343,466	\$487,913	\$487,913
Restricted Debt Reserves:	\$5,854,572	\$7,551,713	\$4,649,442
Other Reserves:	\$2,650,000	\$3,000,000	\$3,113,000
Total Reserves:	\$11,826,149	\$14,175,715	\$11,386,444
Total Reserves as % of Total Revenue:	130%	124%	80%

**Bond Summary**

Current Bond Rating: n/a  
 Source: n/a

\*



District Name: Channel Islands Beach Community Service District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$2,786,157	\$6,270,555	\$2,561,765
Expenses:	\$2,236,440	\$2,461,910	\$2,374,773
Capital Improvements:	\$18,946	\$84,892	\$21,700
Reserves:	\$598,305	\$1,783,305	\$1,783,305
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$117,876	\$88,407	\$27,000
Fees:	\$2,277,541	\$2,250,232	\$2,280,000
Assessments:	\$230,281	\$232,017	\$176,545
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$160,459	\$99,899	\$78,220
<b>Reserves</b>			
Operating Reserves:	\$300,000	\$300,000	\$300,000
Capital Reserve Fund:	\$298,305	\$1,183,305	\$1,183,305
Operating and Rate Stabilization Fund:	\$0	\$300,000	\$300,000
Restricted Debt Reserves:	\$528,713	\$539,232	\$529,000
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$1,127,018	\$2,322,537	\$2,312,305
Total Reserves as % of Total Revenue:	40%	37%	90%

**Bond Summary**

Current Bond Rating: BBB  
 Source: Standard & Poor's

District Name: City of Camarillo

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$8,690,500	\$9,080,600	\$8,751,000
Expenses:	\$7,117,186	\$8,090,099	\$8,004,722
Capital Improvements:	\$2,897,764	\$218,992	\$770,000
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$7,368,500	\$7,293,200	\$7,542,000
Fees:	\$528,000	\$1,187,400	\$424,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest income)	\$794,000	\$600,000	\$785,000
<b>Reserves</b>			
Operating Reserves:	\$3,772,251	\$4,033,642	\$4,235,324
Capital Reserve Fund:	\$8,219,165	\$10,116,260	\$8,831,301
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$39,522	\$39,522	\$23,054
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$12,030,938	\$14,189,424	\$13,089,679
Total Reserves as % of Total Revenue:	138%	156%	150%

**Bond Summary**

Current Bond Rating: A+ (stable)  
 Source: Standard & Poor's as of 1-1-1999

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: City of Filmore

**Financial Summary**

	<b>2000-2001</b>	<b>2001-2002</b>	<b>2002-2003</b>
Revenues:	\$890,038	\$890,038	\$867,000
Expenses:	\$876,904	\$934,651	\$874,632
Capital Improvements:	\$0	\$525,524	\$748,500
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$788,310	\$862,581	\$847,000
Fees:	\$101,728	\$13,430	\$20,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest)	\$0	\$0	\$1,500
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$0	\$0	\$0
Total Reserves as % of Total Revenue:	0%	0%	0%

**Bond Summary**

Current Bond Rating:

Source:

District Name: City of Oxnard

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$19,303,324	\$17,969,945	\$17,969,945
Expenses:	\$15,687,924	\$14,779,095	\$14,779,095
Capital Improvements:	\$3,615,400	\$3,190,400	\$3,190,400
Reserves:	\$0	\$ -	\$ -
Transfers to General Fund	\$2,035,614	\$2,869,865	\$2,212,767
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$19,303,324	\$17,969,945	\$17,969,945
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
*Other:	\$0	\$0	\$0
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$0	\$0	\$0
Total Reserves as % of Total Revenue:	0%	0%	0%

**Bond Summary**

Current Bond Rating: A+  
 Source: Standard & Poor's

District Name: City of Port Hueneme

**Financial Summary**

	<b>2000-2001</b>	<b>2001-2002</b>	<b>2002-2003</b>
Revenues:	\$5,805,852	\$5,476,672	\$5,180,500
Expenses:	\$7,033,593	\$5,965,632	\$4,944,527
Capital Improvements:	\$33,950	\$22,579	\$91,011
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$1,177,190	\$1,160,321	\$1,009,100
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$4,968,377	\$5,391,059	\$5,163,500
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest income)	\$837,475	\$75,901	\$17,000
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:	\$6,699,616	\$7,390,685	\$7,450,000
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$6,699,616	\$7,390,685	\$7,450,000
Total Reserves as % of Total Revenue:	115%	135%	144%

**Bond Summary**

Current Bond Rating: n/a  
 Source: n/a

District Name: City of San Buenaventura

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$39,455,052	\$70,215,219	\$71,728,558
Expenses:	\$25,729,669	\$27,895,986	\$27,205,145
Capital Improvements:	\$36,283,133	\$39,370,219	\$44,523,413
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$11,563,900	\$10,286,230	\$12,022,051
Fees:	\$14,760,088	\$15,668,605	\$15,880,361
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$68,290	\$181,982
Other: (Interest, Misc., Recoverable)	\$3,506,123	\$2,727,751	\$1,907,194
<b>Reserves</b>			
Operating Reserves:	\$0	\$0	\$0
Capital Reserve Fund:	\$0	\$0	\$0
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$2,579,879	\$2,005,393	\$2,002,725
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$2,579,879	\$2,005,393	\$2,002,725
Total Reserves as % of Total Revenue:	7%	3%	3%

**Bond Summary**

Current Bond Rating: Aaaa and AAA

Source: Moody's and Standard & Poor's

NOTE: All financial data is a summary of Wastewater and Water services combined.

District Name: City of Santa Paula

**Financial Summary**

	<b>2000-2001</b>	<b>2001-2002</b>	<b>2002-2003</b>
Revenues:	\$6,838,240	\$7,291,380	\$7,811,720
Expenses:	\$5,766,890	\$6,608,926	\$7,346,588
Capital Improvements:	\$820,000	\$3,465,207	\$5,207,724
Reserves:	\$350,000	\$350,000	\$350,000
Transfers to General Fund	\$0	\$423,696	\$445,840
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$6,695,000	\$6,687,500	\$7,183,800
Fees:	\$71,500	\$348,000	\$357,300
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$71,700	\$255,880	\$270,620
<b>Reserves</b>			
Operating Reserves:	\$350,000	\$350,000	\$350,000
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves*:			
Total Reserves:	\$350,000	\$350,000	\$350,000
Total Reserves as % of Total Revenue:	5%	5%	4%

**Bond Summary**

Current Bond Rating: AAA / A-A+  
 Source: Standard and Poor's

District Name: City of Simi Valley

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$8,540,500	\$9,185,400	\$8,921,400
Expenses:	\$8,544,900	\$9,308,800	\$9,470,700
Capital Improvements:	\$1,565,600	\$0	\$5,599,000
Reserves:	\$18,472,089	\$14,932,107	\$10,755,256
Transfers to General Fund	\$851,400	\$906,600	\$1,066,500
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$7,747,600	\$8,440,600	\$8,469,100
Fees:	\$492,900	\$444,800	\$259,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest income)	\$300,000	\$300,000	\$193,300
<b>Reserves</b>			
Operating Reserves:	\$2,678,740	\$2,462,755	\$2,545,073
Capital Reserve Fund:	\$15,793,349	\$12,469,352	\$8,210,183
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$18,472,089	\$14,932,107	\$10,755,256
Total Reserves as % of Total Revenue:	216%	163%	121%

**Bond Summary**

Current Bond Rating: AAA  
 Source: Standard & Poor's

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	



District Name: City of Thousand Oaks

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$17,972,500	\$19,721,100	\$20,017,800
Expenses:	\$17,816,782	\$19,903,662	\$20,759,761
Capital Improvements:	\$12,148,600	\$12,502,793	\$14,498,876
Reserves:	\$34,479,319	\$33,783,729	TBD*
Transfers to General Fund	\$194,586	\$195,429	\$202,500
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$24,551,300	\$25,166,700	TBD*
Fees:	\$221,800	\$286,200	TBD*
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$30,828,000	\$19,030,400	TBD*
<b>Reserves</b>			
Operating Reserves:	\$3,442,000	\$2,513,100	n/a
Capital Reserve Fund:	\$24,551,900	\$35,766,700	n/a
Operating and Rate Stabilization Fund:	\$0	\$0	n/a
Restricted Debt Reserves:	\$1,502,000	\$1,502,000	\$1,502,000
Other Reserves:	\$5,885,400	\$5,885,400	n/a
Total Reserves:	\$35,381,300	\$45,667,200	\$1,502,000
Total Reserves as % of Total Revenue:	197%	232%	8%

\*unknown until 02/03 books closed.

**Bond Summary**

Current Bond Rating: None  
 Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Fox Canyon Groundwater Management Agency

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$484,364	\$394,405	n/a
Expenses:	\$305,655	\$186,221	n/a
Capital Improvements:	\$0	\$0	n/a
Reserves:	\$50,000	\$50,000	\$50,000
Transfers to General Fund	\$0	\$0	n/a
<b>Revenue Sources</b>			
Property Taxes:			
Special Taxes:			
Service Charges:			
Fees:	\$454,364	\$354,965	n/a
Assessments:			
Stand-by Charges:			
Grants:			
Other:	\$30,000	\$30,000	\$30,000
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			\$150,000
Total Reserves:	\$60,546	\$49,301	\$150,000
Total Reserves as % of Total Revenue:	13%	13%	n/a

**Bond Summary**

Current Bond Rating: n/a  
 Source: n/a

District Name: Hidden Valley Municipal Water District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$56,627	\$40,564	\$30,000
Expenses:	\$12,093	\$33,933	\$25,000
Capital Improvements:	\$0	\$0	\$0
Reserves:	\$44,534	\$6,631	\$5,000
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$6,417	\$4,276	\$0
Special Taxes:	\$77	\$66	\$0
Service Charges:	\$0	\$0	\$0
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$34,090	\$28,074	\$15,055
Grants:	\$0	\$0	\$0
Other:	\$16,043	\$8,148	\$0
<b>Reserves</b>			
Operating Reserves:	\$44,375	\$6,628	\$4,998
Capital Reserve Fund:	\$334,153	\$340,784	\$345,784
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$378,528	\$347,412	\$350,782
Total Reserves as % of Total Revenue:	668%	856%	1169%

**Bond Summary**

Current Bond Rating: N/A  
 Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Lake Sherwood Community Service District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$1,650,144	\$1,788,540	\$2,017,625
Expenses:	\$1,565,648	\$1,537,907	\$2,834,140
Capital Improvements:	\$33,026	\$21,294	\$422,000
Reserves:	\$685,672	\$899,615	\$1,136,196
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$825,827	\$1,011,104	\$875,500
Fees:	\$0	\$0	\$0
Assessments:	\$688,246	\$647,879	\$1,066,425
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$136,071	\$129,557	\$75,700
<b>Reserves</b>			
Operating Reserves:	\$0	\$0	\$0
Capital Reserve Fund:	\$0	\$118,735	\$118,118
Operating and Rate Stabilization Fund:	\$107,055	\$200,000	\$200,000
Restricted Debt Reserves:	\$579,617	\$580,880	\$589,313
Other Reserves:	\$0	\$0	\$228,765
Total Reserves:	\$686,672	\$899,615	\$1,136,196
Total Reserves as % of Total Revenue:	42%	50%	56%

**Bond Summary**

Current Bond Rating: N/A

Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Meiners Oaks County Water District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	---	---	---
Expenses:	---	---	---
Capital Improvements:	---	---	---
Reserves:	---	---	---
Transfers to General Fund	---	---	---
<b>Revenue Sources</b>			
Property Taxes:	\$70,386	\$23,967	\$70,000
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$0	\$0	\$0
Fees:	\$394,096	\$431,709	\$421,993
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest income)	\$114,595	\$74,056	\$80,000
<b>Reserves</b>			
Operating Reserves:	\$251,000	\$0	\$0
Capital Reserve Fund:	\$320,229	\$0	\$0
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$200,000	\$0	\$0
Total Reserves:	\$771,229	\$0	\$0
Total Reserves as % of Total Revenue:	---	---	---

**Bond Summary**

Current Bond Rating: n/a  
 Source: n/a

District Name: Montalvo Municipal Improvement District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$481,586	\$464,456	\$439,450
Expenses:	\$402,607	\$406,557	\$512,260
Capital Improvements:	\$223,525	\$126,843	\$87,338
Reserves:			
Transfers to General Fund			
<b>Revenue Sources</b>			
Property Taxes:	\$170,697	\$178,169	\$149,000
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$211,806	\$224,695	\$244,800
Fees:	\$8,950	\$9,150	\$8,500
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other (rental interest, misc.):	\$90,133	\$51,942	\$68,600
<b>Reserves</b>			
Operating Reserves:	\$400,000	\$400,000	\$400,000
Capital Reserve Fund:	\$100,000	\$100,000	\$100,000
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves*:	\$700,000	\$700,000	\$700,000
Total Reserves:	\$1,200,000	\$1,200,000	\$1,200,000
Total Reserves as % of Total Revenue:	249%	258%	273%

**Bond Summary**

Current Bond Rating: n/a  
 Source: n/a

\* Other Reserves includes Flood Protection Contingency.

District Name: Ocean View Municipal Water District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$373,245	\$347,666	\$381,350
Expenses:	\$378,562	\$406,044	\$437,445
Capital Improvements:	\$0	\$0	\$0
Reserves:	\$251,297	\$192,920	\$136,825
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$740	\$754	700
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$365,601	\$342,490	\$375,250
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest income)	\$6,904	\$4,222	\$5,400
<b>Reserves</b>			
Operating Reserves:	\$192,920	\$251,297	\$242,088
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$192,920	\$251,297	\$242,088
Total Reserves as % of Total Revenue:	52%	72%	63%

**Bond Summary**

Current Bond Rating: n/a

Source: n/a

District Name: Ojai Basin Groundwater Management Agency

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$2,331	\$33,623	\$29,946
Expenses:	\$35,789	\$32,189	\$31,232
Capital Improvements:	\$0	\$0	\$0
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$2,331	\$33,623	\$29,946
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$0	\$0	\$0
<b>Reserves</b>			
Operating Reserves:	\$0	\$0	\$0
Capital Reserve Fund:	\$0	\$0	\$800
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$5,000	\$5,000
Total Reserves:	\$0	\$5,000	\$5,800
Total Reserves as % of Total Revenue:	0%	15%	19%

**Bond Summary**

Current Bond Rating: n/a

Source: n/a



District Name: Ojai Valley Sanitary District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$4,345,344	\$4,629,722	\$4,176,380
Expenses:	\$3,294,405	\$3,958,457	\$2,711,913
Capital Improvements:	\$0	\$2,034,653	\$120,000
Reserves:	\$900,000	\$650,000	\$925,695
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$275,078	\$187,900	\$239,700
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$4,172,482	\$4,147,488	\$4,176,380
Fees:	\$216,575	\$136,582	\$471,350
Assessments:	\$59,750	\$60,175	\$56,806
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$0	\$0	\$0
<b>Reserves</b>			
Operating Reserves:	\$1,297,957	\$1,792,704	\$1,869,710
Capital Reserve Fund:	\$14,002,694	\$12,836,971	\$12,196,286
Operating and Rate Stabilization Fund:	\$0	\$1	\$2
Restricted Debt Reserves:	\$1,115,410	\$1,265,823	\$2,601,203
Other Reserves:	\$507,751	\$459,727	\$382,366
Total Reserves:	\$16,923,811	\$16,355,226	\$17,049,566
Total Reserves as % of Total Revenue:	389%	353%	408%

**Bond Summary**

Current Bond Rating: AAA and Aaa  
 Source: Standard & Poor's and Moody's

**Ojai VSD Reserve Categories:**

Deferred Compensation:  
 SRF Loan Payment Reserve:  
 Collection System Replacement Reserve:  
 SDS Reserve:  
 Collection System Capacity Reserve:  
 Equipment Replacement Reserve:  
 Treatment Plant Expansion Reserve:  
 Vehicle Replacement:  
 Treatment Plant Capital Replacement Reserve:  
 Building Reserve  
 Bond Issue Cash- M.O.:  
 1927 Rehab Trustee Funds:  
 1927 Rehab Payment Reserve:  
 2003 Bond Reserve Fund:  
 Treatment Plant Upgrade Reserve:  
**Total Reserved Cash:**

2000-2001	2001-2002	2002-2003	LAFO Reserve Category
\$287,767	\$236,017	\$257,739	Other Reserves:
\$962,380	\$1,132,580	\$2,499,680	Restricted Debt Reserves:
\$4,074,236	\$3,085,553	\$3,044,542	Capital Reserve Fund:
\$219,984	\$223,710	\$124,627	Other Reserves:
\$43,548	\$71,759	\$73,438	Capital Reserve Fund:
\$251,965	\$282,502	\$199,887	Capital Reserve Fund:
\$2,342,376	\$2,325,991	\$2,021,765	Capital Reserve Fund:
\$5,135,480	\$5,637,451	\$119,064	Capital Reserve Fund:
\$0	\$0	\$5,924,152	Capital Reserve Fund:
\$0	\$0	\$10,105	Capital Reserve Fund:
\$153,030	\$133,243	\$101,297	Restricted Debt Reserves:
\$609,407	\$644,734	\$647,303	Operating Reserves:
\$688,550	\$1,147,970	\$1,222,407	Operating Reserves:
\$0	\$0	\$226	Restricted Debt Reserves:
\$2,155,088	\$1,433,714	\$803,332	Capital Reserve Fund:
\$16,923,811	\$16,355,225	\$17,049,564	

District Name: Ojai Water Conservation District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$4,302	\$5,000	\$5,000
Expenses:	\$3,091	\$5,035	\$5,035
Capital Improvements:			
Reserves:			
Transfers to General Fund			
<b>Revenue Sources</b>			
Property Taxes:	\$3,911		
Special Taxes:			
Service Charges:			
Fees:			
Assessments:			
Stand-by Charges:			
Grants:			
Other: (interest income)	\$391		
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$0	\$0	\$0
Total Reserves as % of Total Revenue:	0%	0%	0%

**Bond Summary**

Current Bond Rating: n/a

Source: n/a

District Name: Pleasant Valley County Water District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$1,619,000	\$1,817,400	\$2,169,600
Expenses:	\$2,139,000	\$2,157,000	\$2,601,800
Capital Improvements:	\$1,265,000	\$111,500	\$111,500
Reserves:	\$646,500	\$451,100	\$543,900
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$98,170	\$107,500	\$166,000
Special Taxes:	\$110,510	\$129,000	\$90,000
Service Charges:	\$1,442,490	\$1,772,000	\$1,868,000
Fees:	\$11,600	\$8,880	\$8,400
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (interest income)	\$150,240	\$114,000	\$137,000
<b>Reserves</b>			
Operating Reserves:	\$4,715,400	\$4,772,700	\$4,313,800
Capital Reserve Fund:	\$0	\$0	\$0
Operating and Rate Stabilization Fund:	\$750,000	\$750,000	\$750,000
Restricted Debt Reserves:	\$80,600	\$89,400	\$79,400
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$5,546,000	\$5,612,100	\$5,143,200
Total Reserves as % of Total Revenue:	343%	309%	237%

**Bond Summary**

Current Bond Rating: N/A  
 Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Saticoy Sanitary District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$595,921	\$681,264	\$4,800,000
Expenses:	\$89,374	\$102,425	\$4,878,000
Capital Improvements:	\$239,326	\$508,833	\$4,660,000
Reserves:			
Transfers to General Fund			
<b>Revenue Sources</b>			
Property Taxes:		\$16,000	\$16,000
Special Taxes:			
Service Charges:			
Fees:		\$228,017	\$204,500
Assessments:			
Stand-by Charges:			
Grants:			
Other: (interest income)			
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$0	\$0	\$0
Total Reserves as % of Total Revenue:	0%	0%	0%

**Bond Summary**

Current Bond Rating: n/a  
 Source: n/a

**Note:** Revenue sources submitted as an attachment not labeled for year. Revenue sources distribution shown assumes "First Year of Full Operation" is 2001 - 2002.

District Name: Triunfo Sanitation District

**Financial Summary**

	<b>2000-2001</b>	<b>2001-2002</b>	<b>2002-2003</b>
Revenues:	\$10,016,160	\$11,552,611	\$11,478,498
Expenses:	\$7,779,626	\$8,763,265	\$8,763,265
Capital Improvements:	\$1,977,000	\$2,476,000	\$3,893,981
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$3,857,000	\$3,810,000	\$3,800,000
Fees:	\$5,963,000	\$7,160,020	\$7,100,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other: (Interest income & other)	\$188,000	\$577,000	\$450,000
<b>Reserves</b>			
Operating Reserves:	\$0	\$0	\$0
Capital Reserve Fund:	\$1,984,240	\$3,039,574	\$2,726,452
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$1,984,240	\$3,039,574	\$2,726,452
Total Reserves as % of Total Revenue:	20%	26%	24%

**Bond Summary**

Current Bond Rating: A=; AAA  
 Source: Standard & Poor's

Water Rates:

District Name: United Water Conservation District

**Financial Summary**

	<b>2000-2001</b>	<b>2001-2002</b>	<b>2002-2003</b>
Revenues:	\$8,935,453	\$10,482,426	\$14,243,195
Expenses:	\$9,684,715	\$9,491,591	\$9,302,422
Capital Improvements:	\$992,812	\$863,380	\$5,281,676
Reserves:	\$6,846,147	\$9,244,282	\$6,618,570
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$1,088,821	\$1,172,599	\$1,249,740
Special Taxes:	\$53,748	\$409,533	\$548,768
Service Charges:	\$6,116,517	\$7,210,247	\$7,007,882
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$69,097	\$153,627	\$4,045,464
Other: (interest income)	\$1,607,360	\$1,536,420	\$1,391,341
<b>Reserves</b>			
Operating Reserves:	\$3,851,444	\$5,411,565	\$4,795,161
Capital Reserve Fund:	\$794,741	\$1,732,150	\$0
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$710,011	\$710,011	\$710,011
Other Reserves:	\$1,489,951	\$1,390,465	\$1,113,398
Total Reserves:	\$6,846,147	\$9,244,191	\$6,618,570
Total Reserves as % of Total Revenue:	77%	88%	46%

**Bond Summary**

Current Bond Rating: AAA  
 Source: Standard & Poor's

District Name: Ventura County Service Area No. 29

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$358,068	\$359,346	\$355,300
Expenses:	\$275,082	\$329,243	\$445,740
Capital Improvements:	\$0	\$27,772	\$40,000
Reserves:	\$182,639	\$222,512	\$250,416
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$334,871	\$343,128	\$345,200
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$450	\$450	\$500
Grants:	\$0	\$0	\$0
*Other:	\$22,747	\$15,768	\$9,600
<b>Reserves</b>			
Operating Reserves:	\$20,000	\$20,000	\$20,000
Capital Reserve Fund:	\$132,639	\$152,512	\$170,416
Operating and Rate Stabilization Fund:	\$30,000	\$50,000	\$60,000
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$58,140
Total Reserves:	\$182,639	\$222,512	\$308,556
Total Reserves as % of Total Revenue:	51%	62%	87%

**Bond Summary\*\***

Current Bond Rating: A and A2  
 Source: Moody's; Standard & Poor's

\* Note: Other Revenue Source is interest income.

\*\*Note: Bond Summary is for the County; District Bond Summary is N/A.

District Name: Ventura County Service Area No. 30

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$274,387	\$282,297	\$279,100
Expenses:	\$227,814	\$228,810	\$382,260
Capital Improvements:	\$0	\$0	\$50,000
Reserves:	\$143,000	\$168,593	\$270,400
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$236,879	\$241,098	\$238,800
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$390	\$390	\$400
Grants:	\$0	\$16,210	\$0
*Other:	\$25,118	\$24,599	\$39,900
<b>Reserves</b>			
Operating Reserves:	\$5,000	\$5,000	\$5,000
Capital Reserve Fund:	\$118,400	\$133,593	\$215,400
Operating and Rate Stabilization Fund:	\$20,000	\$30,000	\$50,000
Restricted Debt Reserves:	\$0	\$0	\$49,860
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$143,400	\$168,593	\$320,260
Total Reserves as % of Total Revenue:	52%	60%	115%

**Bond Summary**

Current Bond Rating: A and A2

Source: Moody's; Standard & Poor's



District Name: Ventura County Service Area 32

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$20,017	\$15,093	\$4,967
Expenses:	\$11,507	\$31,520	\$1,634
Capital Improvements:	\$0	\$0	\$0
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$1,968	\$1,920	\$1,247
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$0	\$0	\$0
Fees:	\$4,221	\$3,765	\$1,995
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$13,828	\$9,408	\$1,725
<b>Reserves</b>			
Operating Reserves:	\$28,522	\$8,944	\$32,174
Capital Reserve Fund:	\$26,100	\$26,100	\$26,100
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$150,972	\$162,482	\$141,201
Total Reserves:	\$205,594	\$197,526	\$199,475
Total Reserves as % of Total Revenue:	1027%	1309%	4016%

**Bond Summary**

Current Bond Rating: AAAF  
 Source: Standard & Poor's

District Name: Waterworks District #1

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$12,852,545	\$11,854,958	\$11,723,448
Expenses:	\$16,759,989	\$13,938,822	\$23,512,476
Capital Improvements:	\$7,534,525	\$2,662,529	\$9,144,000
Reserves:	\$10,091,084	\$16,158,089	\$20,609,442
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$95,034	\$30,341	\$29,098
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$9,609,076	\$10,261,207	\$9,687,500
Fees:	\$806,988	\$758,770	\$1,077,400
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$4,764	\$5,559	\$4,500
Grants:	\$545,668	\$0	\$0
Other:	\$1,791,015	\$799,081	\$924,950
<b>Reserves</b>			
Operating Reserves:	\$821,200	\$368,000	\$500,000
Capital Reserve Fund:	\$4,027,934	\$10,463,599	\$13,127,905
Operating and Rate Stabilization Fund:	\$5,156,600	\$5,309,500	\$5,500,000
Restricted Debt Reserves:	\$85,350	\$16,990	\$20,725
Other Reserves:	\$0	\$0	\$1,460,812
Total Reserves:	\$10,091,084	\$16,158,089	\$20,609,442
Total Reserves as % of Total Revenue:	79%	136%	176%

**Bond Summary**

Current Bond Rating: N/A

Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Waterworks District No. 8

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$16,676,900	\$18,841,600	\$18,284,600
Expenses:	\$17,381,600	\$19,479,400	\$19,357,900
Capital Improvements:	\$0	\$2,370,000	\$954,000
Reserves:	\$1,105,351	\$1,200,859	\$985,575
Transfers to General Fund	\$1,081,700	\$1,144,200	\$1,254,900
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$15,803,500	\$18,262,900	\$17,931,500
Fees:	\$87,000	\$39,000	\$25,000
Assessments:	\$17,600	\$0	\$0
Stand-by Charges:	\$0	\$8,300	\$7,000
Grants:	\$0	\$0	\$0
Other:	\$768,800	\$531,400	\$321,100
<b>Reserves</b>			
Operating Reserves:	\$851,314	\$541,080	\$47,279
Capital Reserve Fund:	\$5,522,443	\$3,532,889	\$1,794,591
Operating and Rate Stabilization Fund:	\$0	\$0	\$0
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$6,373,757	\$4,073,969	\$1,841,870
Total Reserves as % of Total Revenue:	38%	22%	10%

**Bond Summary**

Current Bond Rating: AAA  
 Source: Standard & Poors

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	\$24
Commodity charge:	\$1 0 to 55 BU per BU
	\$2 In excess thereof per BU

District Name: Ventura County Water Works District No. 16

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$204,567	\$259,008	\$2,224,327
Expenses:	\$174,905	\$280,012	\$2,434,994
Capital Improvements:	\$0	\$39,052	\$2,025,000
Reserves:	\$246,428	\$161,580	\$181,656
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$16,309	\$25,792	\$2,827
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$155,258	\$166,694	\$16,429
Fees:	\$0	\$2,500	\$210,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$3,839	\$3,418	\$3,371
Grants:	\$438	\$42,190	\$210,000
Other:	\$28,723	\$18,410	\$1,827,700
<b>Reserves</b>			
Operating Reserves:	\$0	\$0	\$0
Capital Reserve Fund:	\$142,500	\$105,900	\$105,900
Operating and Rate Stabilization Fund:	\$86,578	\$62,156	\$75,756
Restricted Debt Reserves:	\$17,350	\$21,620	\$0
Other Reserves:	\$0	\$0	\$0
Total Reserves:	\$246,428	\$189,676	\$181,656
Total Reserves as % of Total Revenue:	120%	73%	8%

**Bond Summary**

Current Bond Rating: A and A2

Source: Moody's; Standard & Poor's

District Name: Waterworks District #17

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$1,459,008	\$1,515,537	\$1,323,900
Expenses:	\$1,398,404	\$1,617,652	\$1,854,272
Capital Improvements:	\$52,120	\$106,101	\$243,000
Reserves:	\$1,086,686	\$1,260,558	\$1,444,230
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$1,312,720	\$1,409,883	\$1,240,778
Fees:	\$0	\$0	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$16,546	\$15,600	\$14,922
Grants:	\$0	\$0	\$0
Other:	\$129,742	\$90,054	\$68,200
<b>Reserves</b>			
Operating Reserves:	\$185,300	\$115,300	\$115,700
Capital Reserve Fund:	\$507,186	\$759,258	\$759,258
Operating and Rate Stabilization Fund:	\$394,200	\$386,000	\$433,900
Restricted Debt Reserves:	\$0	\$0	\$0
Other Reserves:	\$0	\$0	\$135,372
Total Reserves:	\$1,086,686	\$1,260,558	\$1,444,230
Total Reserves as % of Total Revenue:	74%	83%	109%

**Bond Summary**

Current Bond Rating: N/A

Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Waterworks District #19

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$1,670,678	\$1,766,371	\$1,429,800
Expenses:	\$1,528,655	\$1,498,677	\$3,086,562
Capital Improvements:	\$84,006	\$97,838	\$1,022,000
Reserves:	\$1,731,343	\$1,784,274	\$2,122,470
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$1,492,510	\$1,597,598	\$1,351,600
Fees:	\$10,000	\$28,000	\$4,000
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$33,681	\$0
Other:	\$168,168	\$117,092	\$74,200
<b>Reserves</b>			
Operating Reserves:	\$324,666	\$295,579	\$300,000
Capital Reserve Fund:	\$804,505	\$883,300	\$900,279
Operating and Rate Stabilization Fund:	\$512,800	\$589,100	\$514,100
Restricted Debt Reserves:	\$89,372	\$16,295	\$16,518
Other Reserves:	\$0	\$0	\$391,573
Total Reserves:	\$1,731,343	\$1,784,274	\$2,122,470
Total Reserves as % of Total Revenue:	104%	101%	148%

**Bond Summary**

Current Bond Rating: N/A

Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	

District Name: Ventura Regional Sanitation District

**Financial Summary**

	2000-2001	2001-2002	2002-2003
Revenues:	\$4,969,149	\$5,113,311	\$5,038,230
Expenses:	\$4,969,149	\$5,997,549	\$523,667
Capital Improvements:	\$67,885	\$416,032	\$62,309
Reserves:	\$0	\$0	\$0
Transfers to General Fund	\$0	\$0	\$0
<b>Revenue Sources</b>			
Property Taxes:	\$0	\$0	\$0
Special Taxes:	\$0	\$0	\$0
Service Charges:	\$3,735,720	\$4,042,311	\$5,038,230
Fees:	\$1,233,429	\$1,071,000	\$0
Assessments:	\$0	\$0	\$0
Stand-by Charges:	\$0	\$0	\$0
Grants:	\$0	\$0	\$0
Other:	\$0	\$0	\$0
<b>Reserves</b>			
Operating Reserves:			
Capital Reserve Fund:			
Operating and Rate Stabilization Fund:			
Restricted Debt Reserves:			
Other Reserves:			
Total Reserves:	\$0	\$0	\$0
Total Reserves as % of Total Revenue:	0%	0%	0%

**Bond Summary**

Current Bond Rating: N/A

Source: N/A

**Water Rates for SFD Residential, 5/8th" to 1" Meters**

Service charge:	
Commodity charge:	





**APPENDIX B**

**AGENCY DETERMINATIONS**



Determinations are based on data provided by agencies.

## 1) CALLEGUAS MUNICIPAL WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Calleguas MWD has a Water Master Plan, adopted in 1999, and an Urban Water Management Plan.
  2. That the Calleguas MWD bases its assessment of future water needs on water demand projections forwarded by its member agencies. Current storage capacity is 20 days of supply.
  3. That the Calleguas MWD annually updates its list of infrastructure needs.
  4. That the Calleguas MWD recognizes the regional need for managing water resources.
  5. That the Calleguas MWD is a participant in the Calleguas Creek Watershed Management Plan which addresses long range comprehensive water resources.
  6. That the Calleguas MWD currently has adequate water resources for member agencies.
  7. That ensuring that adequate water sources and supply will continue to be a major concern of the Calleguas MWD and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Calleguas MWD uses SCAG and Census data for population projections.
  2. That the Calleguas MWD also relies on land use decisions by local agencies for population projections.
- **Financing constraints and opportunities**
  1. That the Calleguas MWD prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the Calleguas MWD maintains reserve funds for infrastructure needs and for insurance.
  3. That the Calleguas MWD has issued bonds to finance some capital improvements.
  4. That the Calleguas MWD maintains a Capital Improvement Plan and identifies potential sources of funding.
- **Cost avoidance opportunities**
  1. That the budget process of the Calleguas MWD includes cost/benefit assessment by staff, management and Board members to ensure costs are avoided.
  2. That the Calleguas MWD uses cost sharing programs with other agencies wherever possible such as the watershed plan.
  3. That the Calleguas MWD uses contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Calleguas MWD are set through a public process.
  2. That the Calleguas MWD has established a two-tiered rate structure and a revision of the Capital Construction Charge both of which encourage conservation of water resources.

3. That the Calleguas MWD regularly examines the existing fee structure to ensure fair and equitable rates.
- **Opportunities for shared facilities**
    1. That the Calleguas MWD currently participates in joint ventures and cooperatives with other agencies such as MET and member agencies.
    2. That the Calleguas MWD collaborates with agencies in a variety of planning, conservation and watershed programs.
    3. That the Calleguas MWD has identified increased reservoir capacity as a potential opportunity for future shared facilities.
    4. That the Calleguas MWD has identified and is implementing methods of increasing reclaimed water use among member agencies.
  - **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
    1. That the Calleguas MWD imports water to member agencies and duplication of its services does not exist; governmental structure options with other wholesale water agencies have not been explored.
    2. That the Calleguas MWD believes that consolidation of some of its retail agencies within its service area might result in improvements in water quality, financial efficiency and system reliability.
    3. That the Calleguas MWD should analyze the economic and financial impacts of charges for areas annexing into its service area and into the service area of Metropolitan Water District (MET).
  - **Evaluation of management efficiencies**
    1. That the current management structure of the Calleguas MWD is adequate to serve the present and future needs of the agency.
    2. That the Calleguas MWD has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its water service.
  - **Local accountability and governance**
    1. That the Calleguas MWD is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
    2. That the Board members of the Calleguas MWD are elected and only one elected Board member ran unopposed during the last two election cycles.
    3. That the agency has a website and posts information on it for their customers.

## 2) CAMARILLO SANITARY DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Camarillo SD has a Master Plan, adopted in 1999, which assesses the infrastructure needs and deficiencies in the existing system and projects future needs.
  2. That the Camarillo SD bases its assessment of future wastewater needs on the City's General Plan, the Master Plan and on Community Development Department totals of building activity.
  3. That the Camarillo SD annually updates its list of infrastructure needs.
  4. That the Camarillo SD has adequate wastewater resources for current and future development.
  5. That meeting current and future regulatory requirements will continue to be a concern of the Camarillo SD and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Camarillo SD bases growth and population projections on completed and pending building activity and annexations.
  2. That the Camarillo SD is limited by ordinance to adding 450 units per year.
- **Financing constraints and opportunities**
  1. That the Camarillo SD prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the Camarillo SD maintains an annual Capital Improvement Plan and identifies funding for projects.
  3. That the Camarillo SD requires that new development pay appropriate fees and charges to ensure cost recovery.
- **Cost avoidance opportunities**
  1. That the Camarillo SD uses contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Camarillo SD are set through a public process.
  2. That the Camarillo SD is currently analyzing the existing fee structure to ensure fair and equitable rates.
- **Opportunities for shared facilities**
  1. That the Camarillo SD currently participates with the Camrosa WD for the use of reclaimed water.
  2. That the Camarillo SD collaborates with agencies in watershed programs.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Camarillo SD should investigate the potential benefits, if any, of a reorganization of the District with the City of Camarillo and/or the Camrosa WD.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Camarillo SD is adequate to serve the present and future needs of the agency.

2. That the Camarillo SD has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
  3. That the Camarillo SD uses outside vendors and contracting agencies to provide more efficient services.
- **Local accountability and governance**
    1. That the Camarillo SD Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
    2. That the Board members of the Camarillo SD are elected and no Board member ran unopposed.
    3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

### 3) CAMROSA WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Camrosa WD is currently revising its water and wastewater Master Plans, adopted in 1990 and 1991 respectively, to assess the infrastructure needs and deficiencies in the existing systems and project service demand.
  2. That the Camrosa WD bases its assessment of future wastewater needs on the land use policies and decisions of the City of Camarillo and Ventura County.
  3. That the Camrosa WD annually updates its list of infrastructure needs.
  4. That the Camrosa WD provides service to any requesting parcel, which meets the connection criteria; the District has adequate water and wastewater resources for current and future development.
  5. That meeting current and future regulatory requirements will continue to be a concern of the Camrosa WD and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Camrosa WD bases growth and population projections on estimates provided by the City of Camarillo, Calleguas MWD and Ventura County.
- **Financing constraints and opportunities**
  1. That the Camrosa WD prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure funds concurrent with need.
  2. That the Camrosa WD maintains an annual Capital Improvement Plan and identifies funding for projects.
  3. That the Camrosa WD requires that new development pay appropriate fees and charges to ensure cost recovery.
- **Cost avoidance opportunities**
  1. That the Camrosa WD uses its annual budget process to identify cost avoidance opportunities.
  2. That the Camrosa WD uses outside vendors and contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Camrosa WD are set through a public process.
  2. That the Camrosa WD annually analyzes the existing fee structure to ensure fair and equitable rates.
- **Opportunities for shared facilities**
  1. That the Camrosa WD is currently investigating cooperative projects with the City of Camarillo to reduce costs for wastewater treatment and reclaimed water.
  2. That the Camrosa WD uses the Ventura Regional Sanitation District for some staff functions and for maintenance of equipment and contracts with Ventura County staff for backflow monitoring services.
  3. That the Camrosa WD collaborates with other agencies as appropriate and as deemed efficient, i.e., watershed programs.

- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Camrosa WD provides water and wastewater services to residents of the City of Camarillo and to residents in the unincorporated areas of Ventura County.
  2. That the Camrosa WD should explore the potential benefits, if any, that might result from a reorganization with the city of Camarillo and the Camarillo SD.
  
- **Evaluation of management efficiencies**
  1. That the current management structure of the Camrosa WD is adequate to serve the present and future needs of the agency.
  2. That the Camrosa WD has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
  3. That the Camrosa WD uses outside vendors and contracting agencies to provide more efficient services.
  
- **Local accountability and governance**
  1. That the Camrosa WD Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That all of the Board members of the Camrosa WD are elected and one Board member ran unopposed in the previous election.
  3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.



#### 4) CASITAS MUNICIPAL WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Casitas MWD assesses its current and future infrastructure needs and deficiencies on its annual CIP program.
  2. That adequate water sources and supply will continue to be a major concern of the Casitas MWD.
- **Growth and population projections for the affected area**
  1. No information was provided.
- **Financing constraints and opportunities**
  1. That the Casitas MWD prepares a comprehensive annual budget.
  2. That the Casitas MWD maintains reserve funds for infrastructure needs and for insurance.
- **Cost avoidance opportunities**
  1. That the Casitas MWD noted that it sends projects over \$35,000 through a public bidding process.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Casitas MWD are set through a public process.
- **Opportunities for shared facilities**
  1. That the Casitas MWD should examine the possibility of developing reclaimed water sources with other agencies in the Ojai Valley.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Casitas MWD should participate in a committee to study the potential reorganization of water service providers in the Ojai Valley area.
- **Evaluation of management efficiencies**
  1. That the Casitas MWD noted that in the past year it has decreased staff by 30%, has ensured that the provision of recreational services are self-supporting, has built the largest treatment plant in Ventura County at 33% of the cost of a typical plant, has saved adequate reserves for emergencies and has maintained funding for ongoing maintenance and needed system upgrades.
- **Local accountability and governance**
  1. That the Board members of the Casitas MWD are elected.
  2. That the Casitas MWD holds regularly scheduled meetings.
  3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.
  4. No additional information regarding local accountability and governance was provided by the Casitas MWD.

## 5) CHANNEL ISLANDS BEACH COMMUNITY SERVICES DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Channel Islands Beach CSD is a participant in the Port Hueneme Water Agency, which assesses infrastructure needs and deficiencies.
  2. That meeting current and future regulatory requirements as well as ensuring an adequate supply of water will continue to be a concern of the Channel Islands Beach CSD.
- **Growth and population projections for the affected area**
  1. The District is nearly built-out and relies on the Channel Islands Harbor Master Plan and the Ventura County Public Works plan to project future growth.
- **Financing constraints and opportunities**
  1. That the Channel Islands Beach CSD prepares an annual budget.
  2. That the Channel Islands Beach CSD maintains an annual Capital Improvement Plan and has adequate reserves.
- **Cost avoidance opportunities**
  1. That the Channel Islands Beach CSD uses contractors for services when shown to be cost effective; currently it participates in the Port Hueneme Water Agency as well as numerous other service agreements for the provision of water and wastewater services.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Channel Islands Beach CSD are tiered to encourage conservation.
  2. That the Channel Islands Beach CSD annually analyzes the existing fee structure.
- **Opportunities for shared facilities**
  1. That the Channel Islands Beach CSD currently is a participant in the Port Hueneme Water Agency which is considering participation in the City of Oxnard's GREAT program.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Channel Island Beach CSD should participate in discussion with the Cities of Oxnard and Port Hueneme regarding cost-effective alternatives for future provision.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Channel Islands Beach CSD is adequate at this time to serve the present needs of the agency.
  2. That the Channel Islands Beach CSD uses outside vendors and contracting agencies to provide more efficient services.
- **Local accountability and governance**
  1. That the Channel Islands Beach CSD Board is locally accountable through adherence to applicable government code sections, open and accessible

meetings, and dissemination of information and encouragement of participation in their process.

2. That the Channel Islands Beach CSD holds regularly scheduled meetings at a time and place that encourages public participation.
3. That the Board members of the Channel Islands Beach CSD are elected.

## 6) CITY OF CAMARILLO

- **Infrastructure needs or deficiencies**
  1. That the City of Camarillo prepared a water Master Plan in 1996 to assess the infrastructure needs and deficiencies in the existing systems and project service demand.
  2. That the City of Camarillo bases its assessment of future water needs on the General Plan and water Master Plan.
  3. That the City of Camarillo annually updates its list of infrastructure needs.
  4. That the City of Camarillo has adequate water resources for current and future development.
  5. That meeting current and future regulatory requirements and water needs will continue to be a concern of the City of Camarillo and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the City of Camarillo bases growth and population projections on completed and pending building activity and annexations.
  2. That the City of Camarillo is limited by ordinance to adding 450 units per year.
  3. That the City of Camarillo's General Plan and Housing Element identifies development potential for specific areas which is also used to project future demand for water service.
- **Financing constraints and opportunities**
  1. That the City of Camarillo prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the City of Camarillo maintains an annual Capital Improvement Plan and identifies funding for projects.
  3. That the City of Camarillo requires that new development pay appropriate fees and charges to ensure cost recovery.
- **Cost avoidance opportunities**
  1. That the City of Camarillo uses contractors for services which are shown to be cost effective.
  2. That the City of Camarillo uses their budget process and internal cost/benefit procedures to evaluate costs savings of programs and alternatives.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of Camarillo are set through a public process.
  2. That the City of Camarillo annually analyzes the existing fee structure to ensure a continued level of service and infrastructure maintenance.
- **Opportunities for shared facilities**
  1. That the City of Camarillo collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the City of Camarillo should explore the potential benefits, if any, of a reorganization with the Camarillo SD and the Camrosa WD.

- **Evaluation of management efficiencies**
  1. That the current management structure of the City of Camarillo is adequate to serve the present and future needs of the agency.
  2. That the City of Camarillo has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
  3. That the City of Camarillo uses outside vendors and contracting agencies to provide more efficient services.
  
- **Local accountability and governance**
  1. That the City of Camarillo City Council is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the City Council of the City of Camarillo is elected and no City Council member ran unopposed.
  3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

## 7) CITY OF FILLMORE

- **Infrastructure needs or deficiencies**
  1. That the City of Fillmore has significant infrastructure issues with its wastewater service provision.
  2. That adequate water sources and supply will continue to be a major concern of the City of Fillmore.
- **Growth and population projections for the affected area**
  1. That there may be the potential for growth of the City's population based on a suggested revision of its sphere of influence.
- **Financing constraints and opportunities**
  1. That the City of Fillmore prepares an annual budget.
  2. That the continued implementation of regulations regarding water quality will create financing constraints for the provision of wastewater services.
  3. That the City of Fillmore maintains some reserve funds for infrastructure needs.
- **Cost avoidance opportunities**
  1. That the City of Fillmore uses contractors for services when shown to be cost effective; currently the wastewater treatment plant is operated by private contractors.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of Fillmore are set through a public process.
- **Opportunities for shared facilities**
  1. That the City of Fillmore should continue to pursue the possibility of developing joint wastewater facilities with the City of Santa Paula or other means to ensure that services are provide concurrent with need.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That government structure options for the City of Fillmore are limited regarding the provision of water and wastewater services. The City is currently examining the feasibility of a JPA with the City of Santa Paula.
- **Evaluation of management efficiencies**
  1. That the City of Fillmore currently has current a management structure adequate at this time for the provision of water and wastewater.
- **Local accountability and governance**
  1. That the City Council of the City of Fillmore is elected.
  2. That the City of Fillmore holds regularly scheduled meetings.
  3. That the agency has a website and posts appropriate information on it for their residents.

## 8) CITY OF OXNARD

- **Infrastructure needs or deficiencies**
  1. That the City of Oxnard adopted a wastewater Master Plan and a water Master Plan in 2003.
  2. That the City recently completed a comprehensive and regional analysis of future water service provision.
  3. That the City of Oxnard bases its assessment of future service needs on its General Plan.
  4. That the City of Oxnard annually updates its list of infrastructure needs.
  5. That meeting future regulatory requirements for water quality and ensuring an adequate supply of water are ongoing concerns of the City of Oxnard.
- **Growth and population projections for the affected area**
  1. That the City of Oxnard bases growth and population projections on its General Plan and zoning.
- **Financing constraints and opportunities**
  1. That the City of Oxnard prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the City of Oxnard maintains an annual Capital Improvement Plan and identifies funding for projects.
- **Cost avoidance opportunities**
  1. That the City of Oxnard uses contractors and outside vendors for services when shown to be cost effective.
  2. That the City of Oxnard uses their budget process and internal cost/benefit procedures to evaluate cost savings of programs and alternatives.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of Oxnard are set through a public process.
  2. That the City of Oxnard annually analyzes fees to ensure that funds are available concurrent with need.
- **Opportunities for shared facilities**
  1. That the City of Oxnard collaborates with agencies in multiple ways—through existing agreements and facilities as well as providing for future opportunities through its Groundwater Recovery Enhancement and Treatment (GREAT) program.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the City of Oxnard should participate in a LAFCO study to examine the dissolution of the Ocean View MWD.
  2. That the City of Oxnard should participate in discussions regarding the Channel Islands Beach CSD.
- **Evaluation of management efficiencies**
  1. That the current management structure of the City of Oxnard is adequate to serve the present and future needs of the agency.

2. That the City of Oxnard has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
    1. That the City of Oxnard City Council is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
    2. That the City of Oxnard holds regularly scheduled meetings at a time and place that encourages public participation.
    3. That the City Council of the City of Oxnard is elected and no City Council member ran unopposed.
    4. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.



## 9) CITY OF PORT HUENEME

- **Infrastructure needs or deficiencies**
  1. That the City of Port Hueneme adopted a wastewater Master Plan in 2002 and a water Master Plan in 2002.
  2. That the City of Port Hueneme is a member of the Port Hueneme Water Agency which works regional to ensure the efficient provision of water service.
  3. That the City of Port Hueneme bases its assessment of future service needs on its General Plan.
  4. That the City of Port Hueneme annually updates its list of infrastructure needs.
  5. That meeting future water quality requirements and ensuring an adequate supply of water are ongoing concerns of the City of Port Hueneme.
- **Growth and population projections for the affected area**
  1. That the City of Port Hueneme bases growth and population projections on its General Plan and zoning as well as DOF and SCAG projections.
- **Financing constraints and opportunities**
  1. That the City of Port Hueneme prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the City of Port Hueneme maintains an annual Capital Improvement Plan and identifies funding for projects.
  3. That the City of Port Hueneme pursues grant funding wherever possible.
- **Cost avoidance opportunities**
  1. That the City of Port Hueneme uses contractors and outside vendors for services when shown to be cost effective.
  2. That the City of Port Hueneme uses their budget process and internal cost/benefit procedures to evaluate cost savings of programs and alternatives.
- **Opportunities for rate restructuring**
  1. That the City of Port Hueneme recently completed a water rate study that was implemented in 2003.
  2. That the City of Port Hueneme annually analyzes fees to ensure that funds are available concurrent with need.
  3. That the City is in the process of obtaining money to install water meters to help encourage conservation and lower rates.
- **Opportunities for shared facilities**
  1. That the City of Port Hueneme collaborates with agencies as appropriate including the PHWA and the City of Oxnard as well as numerous other agreements.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the City of Port Hueneme has limited government structure options open to it.
  2. That the City of Port Hueneme should participate in discussions regarding the Channel Islands Beach CSD.

- **Evaluation of management efficiencies**
  1. That the current management structure of the City of Port Hueneme is adequate to serve the present and future needs of the agency.
  2. That the City of Port Hueneme has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
  
- **Local accountability and governance**
  1. That the City of Port Hueneme City Council is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the City of Port Hueneme holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the City Council of the City of Port Hueneme is elected and no City Council member ran unopposed.
  4. That the City has a website and posts copies of their budget and other appropriate information on it for their customers.

## 10) CITY OF SAN BUENAVENTURA

- **Infrastructure needs or deficiencies**
  1. That the City of San Buenaventura adopted a wastewater Master Plan in 1997 and a water Master Plan in 1993.
  2. That the City of San Buenaventura bases its assessment of future service needs on its General Plan.
  3. That the City of San Buenaventura annually updates its list of infrastructure needs.
  4. That meeting future regulatory requirements and ensuring an adequate supply of water are ongoing concerns of the City of San Buenaventura.
- **Growth and population projections for the affected area**
  1. That the City of San Buenaventura bases growth and population projections on its General Plan and zoning.
- **Financing constraints and opportunities**
  1. No information was provided by the City.
- **Cost avoidance opportunities**
  1. That the City of San Buenaventura uses contractors and outside vendors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of San Buenaventura are set through a public process.
- **Opportunities for shared facilities**
  1. No information was provided by the City.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the City of San Buenaventura should examine the potential advantages of reorganizing with the Montalvo MID and the Saticoy SD.
- **Evaluation of management efficiencies**
  1. No information was provided by the City.
- **Local accountability and governance**
  1. That the City of San Buenaventura City Council is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the City of San Buenaventura holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the City Council of the City of San Buenaventura is elected and no City Council member ran unopposed.
  4. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

## 11) CITY OF SANTA PAULA

- **Infrastructure needs or deficiencies**
  1. That the City of Santa Paula has significant infrastructure deficiencies with its current wastewater treatment system.
  2. That meeting future regulatory requirements and ensuring an adequate supply of water are ongoing concerns of the City of Santa Paula.
- **Growth and population projections for the affected area**
  1. That the City of Santa Paula bases growth and population projections on its General Plan and zoning.
- **Financing constraints and opportunities**
  1. That the City of Santa Paula prepares a comprehensive annual budget.
  2. That the City of Santa Paula has financing constraints in upgrading current wastewater facilities.
- **Cost avoidance opportunities**
  1. That the City of Santa Paula uses contractors and outside vendors for services when shown to be cost effective; currently its wastewater treatment plant is operated by a private contractor.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of Santa Paula are set through a public process.
- **Opportunities for shared facilities**
  1. That the City of Santa Paula collaborates with agencies as appropriate; it is considering the feasibility of a JPA with the City of Fillmore for the provision of wastewater services.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the City of Santa Paula should aggressively continue to pursue the possible development of a joint wastewater treatment plant with the City of Fillmore.
- **Evaluation of management efficiencies**
  1. That the current management structure of the City of Santa Paula is adequate to serve the present needs of the agency.
- **Local accountability and governance**
  1. That the City of Santa Paula City Council is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the City of Santa Paula holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the City Council of the City of Santa Paula is elected and no City Council member ran unopposed.
  4. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

## 12) CITY OF SIMI VALLEY

- **Infrastructure needs or deficiencies**
  1. That the City of Simi Valley prepared a wastewater Master Plan in 1985.
  2. That the City of Simi Valley bases its assessment of future service needs on the General Plan.
  3. That the City of Simi Valley annually updates its list of infrastructure needs.
  4. That meeting current and future regulatory requirements and service demands will continue to be a concern of the City of Simi Valley.
- **Growth and population projections for the affected area**
  1. That the City of Simi Valley bases growth and population projections on the General Plan and specific project plans.
- **Financing constraints and opportunities**
  1. That the City of Simi Valley prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the City of Simi Valley maintains an annual Capital Improvement Plan and identifies funding for projects.
- **Cost avoidance opportunities**
  1. That the City of Simi Valley uses contractors and outside vendors for services when proven to be cost effective.
  2. That the City of Simi Valley uses their budget process and internal cost/benefit procedures to evaluate cost savings of programs and alternatives.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of Simi Valley are set through a public process.
  2. That the City of Simi Valley is currently analyzing water fees to ensure that funds are available concurrent with need.
  3. That the City of Simi Valley work with Ventura County Waterworks District #8 and private water purveyors to ensure uniformity of rates to residents.
- **Opportunities for shared facilities**
  1. That the City of Simi Valley collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the City of Simi Valley should analyze the cost savings and potential increase in efficiency that could be gained through a reorganization with Waterworks District #8 and/or the Southern California Water Company.
- **Evaluation of management efficiencies**
  1. That the current management structure of the City of Simi Valley is adequate to serve the present and future needs of the agency.
  2. That the City of Simi Valley has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.

- **Local accountability and governance**
  1. That the City of Simi Valley City Council is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the City Council of the City of Simi Valley is elected and no City Council member ran unopposed.
  3. That the agency has a website and posts information on it for their customers.

### 13) CITY OF THOUSAND OAKS

- **Infrastructure needs or deficiencies**
  1. That the City of Thousand Oaks prepared a wastewater Master Plan in 2002 and is currently updating its water Master Plan.
  2. That the City of Thousand Oaks bases its assessment of future service needs on the General Plan.
  3. That the City of Thousand Oaks annually updates its list of infrastructure needs.
  4. That meeting future regulatory requirements is an ongoing concern of the City of Thousand Oaks.
- **Growth and population projections for the affected area**
  1. That the City of Thousand Oaks bases growth and population projections on the growth control ordinance and zoning.
- **Financing constraints and opportunities**
  1. That the City of Thousand Oaks prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the City of Thousand Oaks maintains an annual Capital Improvement Plan and identifies funding for projects.
- **Cost avoidance opportunities**
  1. That the City of Thousand Oaks uses contractors and outside vendors for services when shown to be cost effective.
  2. That the City of Thousand Oaks uses their budget process and internal cost/benefit procedures to evaluate cost savings of programs and alternatives.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the City of Thousand Oaks are set through a public process.
  2. That the City of Thousand Oaks recently analyzed water fees to ensure that funds are available concurrent with need.
- **Opportunities for shared facilities**
  1. That the City of Thousand Oaks collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. That the current management structure of the City of Thousand Oaks is adequate to serve the present and future needs of the agency.
  2. That the City of Thousand Oaks has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
  1. That the City of Thousand Oaks City Council is locally accountable through adherence to applicable government code sections, open and accessible

meetings, and dissemination of information and encouragement of participation in their process.

2. That the City Council of the City of Thousand Oaks is elected and no City Council member ran unopposed.
3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.



## 14) FOX CANYON GROUNDWATER MANAGEMENT AGENCY

- **Infrastructure needs or deficiencies**
  1. That the Fox Canyon Groundwater Management Agency's Water Management Plan lists prioritized goals and is intended to be consistent with Ventura County's General Plan and the Well Ordinance.
  2. That the Fox Canyon Groundwater Management Agency's regulations have priority over some local laws.
- **Growth and population projections for the affected area**
  1. That the Fox Canyon Groundwater Management Agency bases growth and population projections on Department of Finance and Ventura County figures.
- **Financing constraints and opportunities**
  1. That law limits the Fox Canyon Groundwater Management Agency management fee of \$3.00/AF. Pump fees and penalties for over pumping are the only additional source of income.
  2. That the Fox Canyon Groundwater Management Agency should analyze fees and expected expenses to ensure that adequate funds are provided concurrent with need and with responsibilities.
- **Cost avoidance opportunities**
  1. That the Fox Canyon Groundwater Management Agency has a staff of one full-time and one shared position with limited opportunities for avoiding costs.
- **Opportunities for rate restructuring**
  1. That the pumping fees of the Fox Canyon Groundwater Management Agency are set by its enabling legislation.
  2. That the Fox Canyon Groundwater Management Agency should begin the process to raise its management fee to ensure that in the future adequate funds are available for services.
- **Opportunities for shared facilities**
  1. That the Fox Canyon Groundwater Management Agency shares fiscal, legal, facility space and personnel with Ventura County and collaborates with local water retailers and cities as appropriate.
  2. That the Fox Canyon Groundwater Management Agency should explore sharing resources with member agencies for special studies, conservation plans and staffing.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Fox Canyon Groundwater Management Agency provides unique services regarding groundwater and government structure options are limited.
- **Evaluation of management efficiencies**
  1. That the Fox Canyon Groundwater Management Agency has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.

- **Local accountability and governance**
  1. That the Fox Canyon Groundwater Management Agency Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.

## 15) HIDDEN VALLEY MUNICIPAL WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Hidden Valley Municipal Water District monitors growth and development, water demand and water supplies to 37 ranches.
  2. That the Hidden Valley Municipal Water District should begin to ensure that all wells within the agency are metered, that accurate records of pumping are kept and that an emergency water supply is identified.
- **Growth and population projections for the affected area**
  1. That the Hidden Valley Municipal Water District bases growth and population projections on Ventura County figures.
- **Financing constraints and opportunities**
  1. That the Hidden Valley MWD receives property tax but does not provide direct service to residents.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. That the fees of the Hidden Valley Municipal Water District are set through a public process and are adequate at this time.
- **Opportunities for shared facilities**
  1. None were noted.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Hidden Valley Municipal Water District Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process. All Board members have been elected; none were appointed.
  2. That the Hidden Valley MWD should provide an agency website for their customers.

## 16) LAKE SHERWOOD COMMUNITY FACILITIES DISTRICT

- **Infrastructure needs or deficiencies**
  1. That a water master plan was prepared for the Lake Sherwood Community Facilities District and that Ventura County ensures that all subsequent development is consistent with the master plan.
- **Growth and population projections for the affected area**
  1. That the Lake Sherwood Community Facilities District bases growth and population projections on Ventura County and SCAG figures.
- **Financing constraints and opportunities**
  1. None were noted.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. That the Lake Sherwood Community Facilities District fees are set through a public process and are adequate at this time.
  2. That the Lake Sherwood Community Facilities District has a tiered rate structure, which encourages water conservation.
- **Opportunities for shared facilities**
  1. That the Lake Sherwood Community Facilities District participates in water conservation programs with other agencies as appropriate.
  2. That the Calleguas MWD provides some administrative and management support for the Lake Sherwood Community Facilities.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Lake Sherwood Community Facilities District Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process. All Board members have been elected; none were appointed.
  2. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

**17) MEINERS OAKS MUNICIPAL WATER DISTRICT**

- **Infrastructure needs or deficiencies**
  1. That the Meiners Oaks CWD provides potable water service to approximately 1,300 customers from four wells.
- **Growth and population projections for the affected area**
  1. That the Meiners Oaks CWD uses population projections provided by Ventura County.
- **Financing constraints and opportunities**
  1. That the Meiners Oaks CWD has an annual budget of approximately \$600,000.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. That the fees of the Meiners Oaks CWD are set through a public process.
- **Opportunities for shared facilities**
  1. None were noted.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Meiners Oaks CWD should participate in a committee to examine potential governmental structure options for water and wastewater services in the Ojai Valley.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Meiners Oaks CWD Board is locally accountable.
  2. That the Meiners Oaks CWD holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the Meiners Oaks CWD should provide an agency website for their customers.

## 18) MONTALVO MUNICIPAL IMPROVEMENT DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Montalvo MID provides wastewater service to unincorporated areas of Ventura County.
  2. That meeting current and future regulatory requirements will continue to be a concern of the Montalvo MID.
- **Growth and population projections for the affected area**
  1. That the Montalvo MID bases growth and population projections on SCAG, VOG and Ventura County population projections.
- **Financing constraints and opportunities**
  1. That the Montalvo MID requires that new development pay fees and charges to ensure cost recovery.
- **Cost avoidance opportunities**
  1. That the Montalvo MID uses outside vendors and contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Montalvo MID are set through a public process.
- **Opportunities for shared facilities**
  1. That the Montalvo MID currently shares staffing with the Ventura Regional Sanitation District.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Montalvo MID should analyze the economic and financial impacts of reorganization with the City of San Buenaventura and the Saticoy Sanitary District.
- **Evaluation of management efficiencies**
  1. That the Montalvo MID uses outside vendors and contracting agencies to provide more efficient services.
- **Local accountability and governance**
  1. That the Montalvo MID Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the Montalvo MID holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the Montalvo MID should provide an agency website for their customers.

## 19) OCEAN VIEW MUNICIPAL WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Ocean View Municipal Water District provides agricultural water to customers located along Hueneme Road.
- **Growth and population projections for the affected area**
  1. That the Ocean View MWD does not project growth or population for its service area.
- **Financing constraints and opportunities**
  1. That the financing options for the District are limited by its small size.
- **Cost avoidance opportunities**
  1. That costs might be avoided through reorganization with other agencies
- **Opportunities for rate restructuring**
  1. That the size of the Ocean View Municipal Water District, which has approximately 50 agricultural users, limits opportunities for rate restructuring.
- **Opportunities for shared facilities**
  1. That the Ocean View Municipal Water District participates in water conservation programs with other agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ocean View Municipal Water District should work with Ventura LAFCO to dissolve the District and identify an appropriate successor agency.
- **Evaluation of management efficiencies**
  1. That many of the District's services are provided by other agencies or by private contractors.
- **Local accountability and governance**
  1. That the Ocean View Municipal Water District should hold regularly scheduled meetings at a time and place that encourages public participation.
  2. That the Ocean View Municipal Water District should provide an agency website for their customers.

## 20) OJAI BASIN GROUNDWATER MANAGEMENT AGENCY

- **Infrastructure needs or deficiencies**
  1. That the Ojai Basin Groundwater Management Agency monitors groundwater in the Ojai Valley.
- **Growth and population projections for the affected area**
  1. That the Ojai Basin Groundwater Management Agency bases growth and population projections on Ventura County and SCAG figures.
- **Financing constraints and opportunities**
  1. None were noted.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. That the Ojai Basin Groundwater Management Agency reduced rates by 20% in the last year.
- **Opportunities for shared facilities**
  1. None were noted
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ojai Basin Groundwater Management Agency should participate in a committee to examine the possible reorganization of water and wastewater agencies in the Ojai Valley.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Ojai Basin Groundwater Management Agency holds meetings at a time and place that encourages public participation.
  2. That the Ojai Basin Groundwater Management Agency should provide an agency website for their customers.



## 21) OJAI VALLEY SANITARY DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Ojai Valley SD annually assesses its infrastructure needs and deficiencies and projects future needs through its CIP process.
  2. That the Ojai Valley SD has adequate wastewater resources for current needs.
  3. That meeting current and future regulatory requirements will continue to be a concern of the Ojai Valley SD.
- **Growth and population projections for the affected area**
  1. None were noted by the agency.
- **Financing constraints and opportunities**
  1. That the Ojai Valley SD prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the Ojai Valley SD maintains an annual Capital Improvement Plan and has adequate reserves.
  3. That the Ojai Valley SD requires that new development pay appropriate fees and charges to ensure cost recovery.
- **Cost avoidance opportunities**
  1. That the Ojai Valley SD uses contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ojai Valley SD are set through a public process.
  2. That the Ojai Valley SD annually analyzes the existing fee structure to ensure fair and equitable rates.
- **Opportunities for shared facilities**
  1. That the Ojai Valley SD should examine the possibility of developing reclaimed water sources with other agencies in the Ojai Valley.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted except for updating the agency's SOI.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Ojai Valley SD is adequate to serve the present and future needs of the agency.
  2. That the Ojai Valley SD has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
  3. That the Ojai Valley SD uses outside vendors and contracting agencies to provide more efficient services.
- **Local accountability and governance**
  1. That the Ojai Valley SD Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.

2. That the Ojai Valley SD holds regularly scheduled meetings at a time and place that encourages public participation.
3. That the Board members of the Ojai Valley SD are elected.
4. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

## 22) OJAI WATER CONSERVATION AGENCY

- **Infrastructure needs or deficiencies**
  1. That the Ojai Water Conservation Agency monitors groundwater in the Ojai Valley.
- **Growth and population projections for the affected area**
  1. None were noted by the agency.
- **Financing constraints and opportunities**
  1. None were noted.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. None were noted.
- **Opportunities for shared facilities**
  1. That the Ojai Water Conservation Agency participates in water conservation programs with other agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ojai Water Conservation Agency should participate in a committee to examine the possible reorganization of water and wastewater agencies in the Ojai Valley.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Ojai Water Conservation Agency should hold regularly scheduled meetings at a time and place that encourages public participation.
  2. That the Ojai Water Conservation Agency should provide an agency website for their customers.

## 23) PLEASANT VALLEY COUNTY WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Pleasant Valley County Water District provides water service for agricultural uses only.
  2. That the Pleasant Valley County Water District ensures that water supply and demand are adequate and are consistent with the capacity and facilities of the District.
- **Growth and population projections for the affected area**
  1. That the Pleasant Valley County Water District bases growth and population projections on City of Camarillo figures.
- **Financing constraints and opportunities**
  1. None were noted.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. That the Pleasant Valley County Water District fees are set through a public process and are adequate at this time.
- **Opportunities for shared facilities**
  1. That the Pleasant Valley County Water District participates in water conservation programs with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Pleasant Valley County Water District Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the Pleasant Valley CWD should consider developing a website to disseminate information to the public.

## 24) SATICOY SANITATION DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Saticoy SD provides wastewater service to unincorporated areas of Ventura County.
  2. That meeting current and future regulatory requirements will continue to be a concern of the Saticoy SD.
- **Growth and population projections for the affected area**
  1. That the Saticoy SD bases growth and population projections on SCAG, VOG and Ventura County population projections.
- **Financing constraints and opportunities**
  1. That the Saticoy SD requires that new development pay fees and charges to ensure cost recovery.
  2. That the Saticoy SD has applied for grants and loans for infrastructure upgrades and improvements.
- **Cost avoidance opportunities**
  1. That the Saticoy SD uses outside vendors and contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Saticoy SD are set through a public process.
- **Opportunities for shared facilities**
  1. That the Saticoy SD utilizes staff and expertise from the Ventura Regional Sanitation District.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Saticoy SD should analyze the benefits of reorganization with the City of San Buenaventura and the Montalvo MID.
- **Evaluation of management efficiencies**
  1. That the Saticoy SD uses outside vendors and contracting agencies to provide more efficient services.
- **Local accountability and governance**
  1. That the Saticoy SD Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the Saticoy SD holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the Saticoy SD should provide an agency website for their customers.

## 25) TRIUNFO SANITATION DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Triunfo SD provides potable water service to unincorporated areas of Ventura County and collection of wastewater as well as the distribution of reclaimed water.
  2. That the Triunfo SD does not have a Master Plan for either water or wastewater which can assess the infrastructure needs and deficiencies in the existing systems and project future needs.
  3. That the Triunfo SD bases its assessment of future service needs on interviews with local developers, regulators and appropriate agencies.
  4. That the Triunfo SD should begin preparation of master plans, annual capital improvement projects and funding in order to accurately project future service needs.
  5. That meeting current and future regulatory requirements will continue to be a concern of the Triunfo SD and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Triunfo SD bases growth and population projections on interviews with local developers, regulators and appropriate agencies.
  2. That the Triunfo SD should work closely with land use agencies to ensure an accurate projection of growth and population projections.
- **Financing constraints and opportunities**
  1. That the Triunfo SD requires that new development pay fees and charges to ensure cost recovery.
- **Cost avoidance opportunities**
  1. That the Triunfo SD uses outside vendors and contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Triunfo SD are set through a public process.
- **Opportunities for shared facilities**
  1. That the Triunfo SD currently participates with the Ventura Regional Sanitation District.
  2. That the Triunfo SD collaborates with agencies in watershed programs.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Triunfo SD should analyze the economic and financial impacts of reorganization with other providers in Ventura County.
- **Evaluation of management efficiencies**
  1. That the Triunfo SD uses outside vendors and contracting agencies to provide more efficient services.
- **Local accountability and governance**
  1. That the Triunfo SD Board adheres to applicable government code sections.

2. That three members of the Board of the Triunfo SD are appointed; two Board members are elected.
3. That the Triunfo SD Board should investigate changing the structure of their Board to ensure that all Board members elected.
4. That the Triunfo SD does have a website where it posts budgets and other appropriate information about the agency.

## 26) UNITED WATER CONSERVATION DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the United Water Conservation District has a strategic plan that addresses water needs based on the plans of the District's member agencies.
  2. That meeting the District's mission to protect and conserve water resources in the Santa Clara watershed will continue to be a concern of the United Water Conservation District.
- **Growth and population projections for the affected area**
  1. That the United Water Conservation District bases growth and population projections on SCAG, VOG, Ventura County and municipal population projections and reports
- **Financing constraints and opportunities**
  1. That the United Water Conservation District must balance lower rates to encourage the use of its facilities, adequate replacement of facilities, the continuing unfunded mandates and shifting of existing resources.
- **Cost avoidance opportunities**
  1. That the United Water Conservation District uses outside vendors and contractors for services when shown to be cost effective; it has founded that its services are more effective with a staff of professional groundwater management.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the United Water Conservation District are set through a public process and are established to encourage conservation.
- **Opportunities for shared facilities**
  1. That the United Water Conservation District currently participates in numerous common facilities and services with other agencies.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the government structure options for the United Water Conservation District are limited.
  2. That the United Water Conservation District should participate in discussions regarding the Ocean View MWD.
- **Evaluation of management efficiencies**
  1. That the United Water Conservation District uses outside vendors and contracting agencies to provide more efficient services; it increases management efficiencies through numerous arrangements with other agencies.
- **Local accountability and governance**
  1. That the United Water Conservation District Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.



2. That the United Water Conservation District holds regularly scheduled meetings at a time and place that encourages public participation.

## 27) VENTURA COUNTY SERVICE AREA #29

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Service Area #29 provides wastewater service to coastal communities in northwestern Ventura County.
  2. That meeting current and future regulatory requirements and service demands will continue to be a concern of the Ventura County Service Area #29.
- **Growth and population projections for the affected area**
  1. That the Ventura County Service Area #29 bases growth and population projections on the General Plan, VCOG and SCAG projections.
- **Financing constraints and opportunities**
  1. That the Ventura County Service Area #29 prepares an annual budget.
- **Cost avoidance opportunities**
  1. That the Ventura County Service Area #29 uses contractors and outside vendors for services when determined to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Service Area #29 are set through a public process.
- **Opportunities for shared facilities**
  1. That the Ventura County Service Area #29 collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Ventura County Service Area #29 is adequate to serve the present and future needs of the agency.
  2. That the Ventura County Service Area #29 has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
  1. That the Ventura County Service Area #29 Board (Ventura Board of Supervisors) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.

**28) VENTURA COUNTY SERVICE AREA # 30**

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Service Area #30 provides wastewater service.
  2. That meeting current and future regulatory requirements and service demands will continue to be a concern of the Ventura County Service Area #30.
- **Growth and population projections for the affected area**
  1. That the Ventura County Service Area #30 bases growth and population projections on the General Plan, VCOG and SCAG projections.
- **Financing constraints and opportunities**
  1. That the Ventura County Service Area #30 prepares an annual budget.
- **Cost avoidance opportunities**
  1. That the Ventura County Service Area #30 uses contractors and outside vendors for services when determined to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Service Area #30 are set through a public process.
- **Opportunities for shared facilities**
  1. That the Ventura County Service Area #30 collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That governmental structure options are limited by the location and size of the Ventura County Service Area #30.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Ventura County Service Area #30 is adequate to serve the present and future needs of the agency.
  2. That the Ventura County Service Area #30 has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
  1. That the Ventura County Service Area #30 Board (Ventura Board of Supervisors) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.

## 29) VENTURA COUNTY SERVICE AREA # 32

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Service Area #32 provides permitting and inspection of on-site wastewater systems to the unincorporated areas of Ventura County.
  2. That meeting current and future regulatory requirements, in particular AB885, will continue to be a concern of the Ventura County Service Area #32.
- **Growth and population projections for the affected area**
  1. That the Ventura County Service Area #32 bases growth and population projections on the General Plan, VCOG and SCAG projections.
- **Financing constraints and opportunities**
  1. That the Ventura County Service Area #32 prepares an annual budget.
- **Cost avoidance opportunities**
  1. That the Ventura County Service Area #32 uses contractors and outside vendors as needed for services when determined to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Service Area #32 are set through a public process.
- **Opportunities for shared facilities**
  1. None were noted.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Ventura County Service Area #32 is adequate to serve the present and future needs of the agency.
  2. That the Ventura County Service Area #32 has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
  1. That the Ventura County Service Area #32 Board (Ventura Board of Supervisors) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.

### 30) VENTURA COUNTY WATERWORKS DISTRICT #1

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Waterworks District #1 provides potable water and wastewater services to the City of Moorpark and unincorporated areas to north and east.
  2. That the Ventura County Waterworks District #1 has a water and wastewater Master Plan, adopted in 1992 and 1996 respectively, which is used to assess the infrastructure needs and deficiencies in the existing systems and project future needs.
  3. That the Ventura County Waterworks District #1 is currently applying for permits to increase the capacity of its wastewater treatment plant to 5 mgd and the capacity of its reclamation system to 3 mgd.
  4. That meeting current and future regulatory requirements will continue to be a concern of the Ventura County Waterworks District #1 and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Ventura County Waterworks District #1 bases growth and population projections on the City of Moorpark and Ventura County General Plans and on population projections from SCAG.
  2. That the Ventura County Waterworks District #1 also uses its master plans to project growth and population.
- **Financing constraints and opportunities**
  1. That the Ventura County Waterworks District #1 requires that new development pay fees and charges to ensure cost recovery.
  2. That the Ventura County Waterworks District #1 prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  3. That the Ventura County Waterworks District #1 maintains an annual Capital Improvement Plan and identifies funding for projects.
  4. That the state and federal funding for water and wastewater systems is structured and funded in a manner which limits opportunities for local agencies.
- **Cost avoidance opportunities**
  1. That the Ventura County Waterworks District #1 uses outside vendors and contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Waterworks District #1 are set through a public process.
  2. That the Ventura County Waterworks District #1 has adopted a tiered water rate structure to encourage water conservation. The tiered rate structure establishes base allocations for customers with higher charges for water consumption above the base allocation. Wastewater rates are also based on water consumption.
- **Opportunities for shared facilities**
  1. That the Ventura County Waterworks District #1 currently participates with the Calleguas MWD and other agencies on conservations programs.

2. That the Ventura County Waterworks District #1 is a participant in the Calleguas Creek Watershed Management Plan in order to find cost-effective methods to meet treatment requirements.
  3. That the Ventura County Waterworks District #1 shares equipment and staff during emergencies.
  4. That the Ventura County Waterworks District #1 is building a new office facility, which could be used by other agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
    1. That the Ventura County Waterworks District #1 should explore the possibility of a reorganization with the City of Moorpark.
  - **Evaluation of management efficiencies**
    1. That the Ventura County Waterworks District #1 uses outside vendors and contracting agencies to provide more efficient services.
    2. That the current management structure of the Ventura County Waterworks District #1 is adequate to serve the present and future needs of the agency.
    3. That the Ventura County Waterworks District #1 has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
  - **Local accountability and governance**
    1. That the Ventura County Waterworks District #1 Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
    2. That the governing Board of the Ventura County Waterworks District #1 is elected; none ran unopposed in the most recent election.
    3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

### 31) VENTURA COUNTY WATERWORKS DISTRICT #8

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Waterworks District #8 provides potable water service to the City of Simi Valley and unincorporated areas of Ventura County.
  2. That the Ventura County Waterworks District #8 has a water Master Plan, adopted in 1986, which is used to assess the infrastructure needs and deficiencies in the existing systems and project future needs.
  3. That the Ventura County Waterworks District #8 annually updates its list of infrastructure needs.
  4. That meeting current and future regulatory requirements and service demands will continue to be a concern of the Ventura County Waterworks District #8.
- **Growth and population projections for the affected area**
  1. That the Ventura County Waterworks District #8 bases growth and population projections on the General Plan and specific project plans.
- **Financing constraints and opportunities**
  1. That the Ventura County Waterworks District #8 prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  2. That the Ventura County Waterworks District #8 maintains an annual Capital Improvement Plan and identifies funding for projects.
- **Cost avoidance opportunities**
  1. That the Ventura County Waterworks District #8 uses contractors and outside vendors for services when determined to be cost effective.
  2. That the Ventura County Waterworks District #8 uses their budget process and internal cost/benefit procedures to evaluate costs savings of programs and alternatives.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Waterworks District #8 are set through a public process.
  2. That the Ventura County Waterworks District #8 is currently analyzing water fees to ensure that funds are available concurrent with need.
- **Opportunities for shared facilities**
  1. That the Ventura County Waterworks District #8 collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ventura County Waterworks District #8 should analyze the cost savings and potential increases in efficiency that could be gained through a reorganization/merger with the City of Simi Valley and/or the Southern California Water Company.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Ventura County Waterworks District #8 is adequate to serve the present and future needs of the agency.

2. That the Ventura County Waterworks District #8 has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
    1. That the Ventura County Waterworks District #8 (City of Simi Valley City Council) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
    2. That the Board of the Ventura County Waterworks District #8 (City of Simi Valley City Council) is elected and no City Council member ran unopposed.
    3. That the agency should post budgets and other information on the City of Simi Valley website.



### 32) VENTURA COUNTY WATERWORKS DISTRICT # 16

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Waterworks District #16 provides water and wastewater service to the community of Piru.
  2. That meeting current and future regulatory requirements and service demands will continue to be a concern of the Ventura County Waterworks District #16.
- **Growth and population projections for the affected area**
  1. That the Ventura County Waterworks District #16 bases growth and population projections on the General Plan, VCOG and SCAG projections.
- **Financing constraints and opportunities**
  1. That the Ventura County Waterworks District #16 prepares an annual budget.
- **Cost avoidance opportunities**
  1. That the Ventura County Waterworks District #16 uses contractors and outside vendors for services when determined to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Waterworks District #16 are set through a public process.
- **Opportunities for shared facilities**
  1. That the Ventura County Waterworks District #16 collaborates with agencies as appropriate.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That governmental structure options are limited by the location and size of the Ventura County Waterworks District #16.
- **Evaluation of management efficiencies**
  1. That the current management structure of the Ventura County Waterworks District #16 is adequate to serve the present and future needs of the agency.
  2. That the Ventura County Waterworks District #16 has current management, interdepartmental and inter-agency practices and procedures appropriate to and efficient for its service.
- **Local accountability and governance**
  1. That the Ventura County Waterworks District #16 Board (Ventura Board of Supervisors) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.

### 33) VENTURA COUNTY WATERWORKS DISTRICT #17

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Waterworks District #17 provides potable water to the unincorporated area of Bell Canyon and additional territory to the north.
  2. That meeting current and future regulatory requirements will continue to be a concern of the Ventura County Waterworks District #17 and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Ventura County Waterworks District #17 bases growth and population projections on Ventura County General Plans and on population projections from SCAG.
- **Financing constraints and opportunities**
  1. That the Ventura County Waterworks District #17 requires that new development pay fees and charges to ensure cost recovery.
  2. That the Ventura County Waterworks District #17 prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  3. That the Ventura County Waterworks District #17 maintains an annual Capital Improvement Plan and identifies funding for projects.
  4. That the funding for water systems is structured and funded in a manner, which limits opportunities for local agencies.
- **Cost avoidance opportunities**
  1. That the Ventura County Waterworks District #17 uses outside vendors and contractors for services when determined to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Waterworks District #17 are set through a public process.
  2. That the Ventura County Waterworks District #17 has adopted a tiered water rate structure to encourage water conservation. The tiered rate structure establishes base allocations for customers with higher charges for water consumption above the base allocation.
- **Opportunities for shared facilities**
  1. That the Ventura County Waterworks District #17 currently participates with the Calleguas MWD and Metropolitan Water District on conservations programs.
  2. That the Ventura County Waterworks District #17 is a participant in the Calleguas Creek Watershed Management Plan in order to find cost-effective methods to meet treatment requirements.
  3. That the Ventura County Waterworks District #17 shares equipment and staff during emergencies.
  4. That the Ventura County Waterworks District #17 shares facilities with other agencies as appropriate.

- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ventura County Waterworks District #17 and LAFCO should consider the efficiencies that might be gained from a reorganization of the Ahmanson Ranch CSD and the Ventura County Waterworks District #17 if the Ahmanson Ranch development proceeds.
  
- **Evaluation of management efficiencies**
  1. That the Ventura County Waterworks District #17 contracts with the Calleguas MWD for administrative and management support for conservation programs.
  2. That the Ventura County Waterworks District #17 contracts with other agencies and outside vendors when shown to be cost-effective.
  
- **Local accountability and governance**
  1. That the Ventura County Waterworks District #17 Board (Ventura County Board of Supervisors) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the governing Board of the Ventura County Waterworks District #17 (Ventura County Board of Supervisors) is elected; none ran unopposed in the most recent election.
  3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

### 34) VENTURA COUNTY WATERWORKS DISTRICT #19

- **Infrastructure needs or deficiencies**
  1. That the Ventura County Waterworks District #19 provides potable water to the unincorporated community of Somis.
  2. That the Ventura County Waterworks District #19 has a water Master Plan, adopted in 1985, which is used to assess the infrastructure needs and deficiencies in the existing systems and project future needs.
  3. That meeting current and future regulatory requirements will continue to be a concern of the Ventura County Waterworks District #19 and other agencies in Ventura County.
- **Growth and population projections for the affected area**
  1. That the Ventura County Waterworks District #19 bases growth and population projections on Ventura County General Plans and on population projections from SCAG.
- **Financing constraints and opportunities**
  1. That the Ventura County Waterworks District #19 requires that new development pay fees and charges to ensure cost recovery.
  2. That the Ventura County Waterworks District #19 prepares a comprehensive annual budget and has adopted financial policies and procedures to ensure adequate funds concurrent with need.
  3. That the Ventura County Waterworks District #19 maintains an annual Capital Improvement Plan and identifies funding for projects.
  4. That the funding for water systems is structured and funded in a manner, which limits opportunities for local agencies.
- **Cost avoidance opportunities**
  1. That the Ventura County Waterworks District #19 uses outside vendors and contractors for services when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the rates and fees of the Ventura County Waterworks District #19 are set through a public process.
  2. That the Ventura County Waterworks District #19 has adopted a tiered water rate structure to encourage water conservation. The tiered rate structure establishes base allocations for customers with higher charges for water consumption above the base allocation.
- **Opportunities for shared facilities**
  1. That the Ventura County Waterworks District #19 currently participates with the Calleguas MWD and Metropolitan Water District on conservations programs.
  2. That the Ventura County Waterworks District #19 is a participant in the Calleguas Creek Watershed Management Plan in order to find cost-effective methods to meet treatment requirements.
  3. That the Ventura County Waterworks District #19 shares equipment and staff during emergencies.
  4. That the Ventura County Waterworks District #19 shares facilities with other agencies as appropriate.

- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ventura County Waterworks District #19 should consider the efficiencies that might be gained by reorganization with smaller mutual water companies.
  2. That the presence of agricultural uses within the boundaries of the Ventura County Waterworks District #19 is beneficial due to the lower rates which encourage and support those uses.
  
- **Evaluation of management efficiencies**
  1. That the Ventura County Waterworks District #19 contracts with the Calleguas MWD for administrative and management support for conservation programs.
  2. That the Ventura County Waterworks District #19 contracts with other agencies and outside vendors when shown to be cost-effective.
  
- **Local accountability and governance**
  1. That the Ventura County Waterworks District #19 Board (Ventura County Board of Supervisors) is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the governing Board of the Ventura County Waterworks District #19 (Ventura County Board of Supervisors) is elected; none ran unopposed in the most recent election.
  3. That the agency has a website and posts copies of their budget and other appropriate information on it for their customers.

### 35) VENTURA REGIONAL SANITATION DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Ventura Regional Sanitation District provides contract water and wastewater services to agencies within Ventura County.
- **Growth and population projections for the affected area**
  1. That the Ventura Regional Sanitation District uses growth and population projections from contracting agencies and other land use agencies.
- **Financing constraints and opportunities**
  1. None were noted.
- **Cost avoidance opportunities**
  1. That the Ventura Regional Sanitation District provides contract services to other agencies when shown to be cost effective.
- **Opportunities for rate restructuring**
  1. That the charges of the Ventura Regional Sanitation District are set through a public process and in conjunction with contracting agencies.
- **Opportunities for shared facilities**
  1. That the Ventura Regional Sanitation District provides contract services to other agencies when shown to be cost effective.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. None were noted.
- **Evaluation of management efficiencies**
  1. That the Ventura Regional Sanitation District provides cost-effective services to contracting agencies.
- **Local accountability and governance**
  1. That the Ventura Regional Sanitation District Board adheres to applicable government code sections.
  2. That nine members of the Board of the Ventura Regional Sanitation District are appointed.
  3. That the agency does not post copies of their budget and other appropriate information on a website.

### 36) VENTURA RIVER COUNTY WATER DISTRICT

- **Infrastructure needs or deficiencies**
  1. That the Ventura River County Water District provides potable water service for approximately 2,200 customers.
  2. That the Ventura River County Water District ensures that water supply and demand are adequate and are consistent with the capacity and facilities of the District.
- **Growth and population projections for the affected area**
  1. That the Ventura River County Water District bases growth and population projections on estimates provided by the City of Ojai, SCAG and Ventura County.
- **Financing constraints and opportunities**
  1. None were noted.
- **Cost avoidance opportunities**
  1. None were noted.
- **Opportunities for rate restructuring**
  1. That the Ventura River County Water District fees are set through a public process and are adequate at this time.
- **Opportunities for shared facilities**
  1. None were noted.
- **Government structure options, including advantages and disadvantages of the consolidation or reorganization of service providers**
  1. That the Ventura River CWD should participate in a committee to examine possible governmental restructuring of the water and wastewater agencies in the Ojai Valley.
- **Evaluation of management efficiencies**
  1. None were noted.
- **Local accountability and governance**
  1. That the Ventura River County Water District Board is locally accountable through adherence to applicable government code sections, open and accessible meetings, and dissemination of information and encouragement of participation in their process.
  2. That the Ventura River County Water District holds regularly scheduled meetings at a time and place that encourages public participation.
  3. That the Ventura River County Water District should provide an agency website for their customers.