

## **DISCUSSION OF PROPOSED PROPOSITION 218 RATE INCREASES**

### **Our Story**

Effective sanitation is a crucial part of maintaining public health. Unsafe sanitation is one of the world's largest health and environmental problems. The staff at Mt. View Sanitary District (MVSD) take protection of the environment and public health very seriously. We are proud of our compliance record treating wastewater to substantially lower limits than most of our neighboring sanitary districts.

As a team, we value professionalism, integrity, and accountability. We are committed to processes that protect against the misuse of public funds. MVSD has maintained the California Special Districts Association's Transparency Certificate of Excellence since 2013. Annual financial audits are performed by a 3<sup>rd</sup> party Certified Public Accountant. Wastewater Operators require very specific training and licensing from the state. Salaries for staff at all levels are established after total compensation (including benefits) classification studies are performed to ensure salaries are reasonable and competitive.

Since the Proposition 218 Rate Increase Notification went out, residents and customers have been communicating concerns by protest letters and social media correspondence. The discussion below is an attempt to provide more information that addresses those concerns. I would like to acknowledge the citizens of MVSD for being proactive and participating in this democratic process. I am truly impressed with your organized effort and will attempt here to provide valuable information to address your concerns as they have been communicated. If you are interested in continued participation, please be aware that MVSD has a Community Advisory Group that meets quarterly to discuss progress on the Strategic Plan goals, Performance Metrics, Capital Planning, Cash Flow projections, and more. To participate, refer to the website at <https://www.mvsd.org/community-advisory-group>. Public participation makes our community stronger and contributes to better decisions because decision-makers have more complete information in the form of additional facts, values, and perspectives obtained through public input.

### **Mt. View Sanitary District Sewer Service Charges (SSC)**

*The SSC is not a tax.* The SSC is a fee for service provided to the property (like your water bill) and collected on the property tax roll. Sewer Service Charges are intended to recover revenues sufficient to adequately fund sewer utility operations, maintenance, and capital replacement expenditures, meet debt service obligations, keep rates as competitive as possible and maintain a prudent level of reserves.

Pursuant to the provisions of Section 53756 of the California Government Code and Section 7.17.1 of the District Code, the District Board of Directors may adopt a schedule of fees or charges authorizing automatic adjustments. The schedule of fees and charges may:

- a) be adopted for a period not to exceed five years.
- b) include a schedule of adjustments, including a clearly defined formula for adjusting for inflation. Any inflation adjustment to a fee or charge for a property-related service shall not exceed the cost of providing that service.

Notice of any adjustment pursuant to the schedule shall be given pursuant to subdivision (a) of Section 53755 of the California Government Code, not less than 30 days before the effective date of the adjustment.

Proposition 218 amended the State Constitution, placing requirements on public agencies wishing to adopt new or increased fees and charges for property-related services. Proposition 218 defines fees and charges as any levy imposed by an agency upon a parcel or upon a person as an incident of property ownership, including a user fee or charge for a property-related service such as the District's Sewer Service Charge.

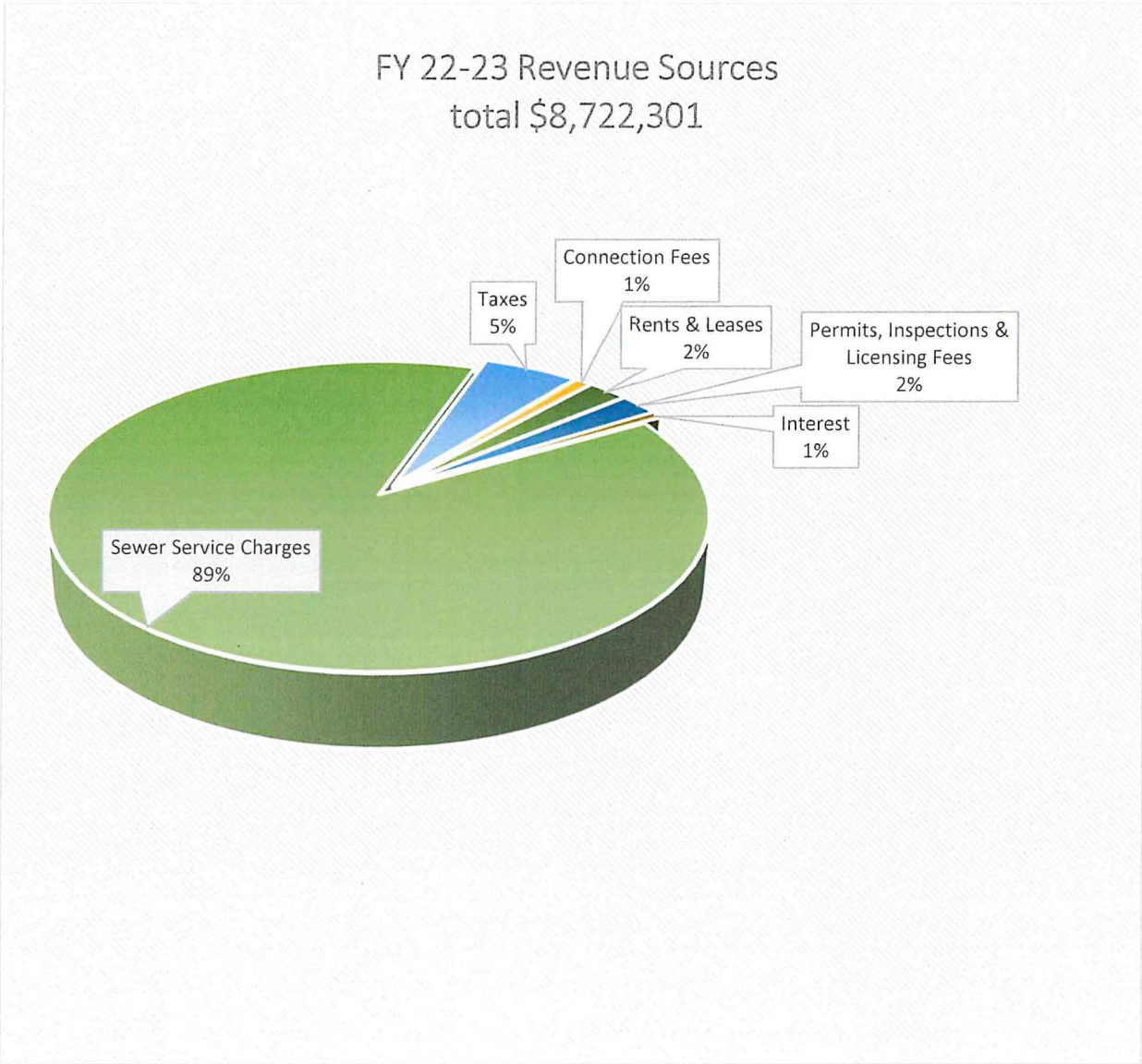
### **Residential v. Commercial Businesses**

Residential single-family parcels are charged an annual rate for sewer service. Commercial business parcels pay a fee per hundred cubic feet (HCF) of water used. MVSD serves an estimated population of 22,000 residents consisting of approximately 7,912 residential and 314 commercial, industrial, and institutional sewer connections. For Fiscal Year 2023-2024 (the upcoming fiscal year), the District anticipates collecting 1.80 million dollars from commercial business parcels, which is 19% of the anticipated revenue for the upcoming fiscal year. The average commercial business parcel will pay \$5,745/year. Some business parcels will pay more than \$14,000/year. This is significantly higher than the recommended single-family residence rate of \$888/year for FY 23-24

### **Sewer Service Charge Rebate Assistance Program (SSCRAP)**

Because the District recognizes the difficulty faced by homeowners with a limited fixed income, the Board of Directors has approved the SSCRAP, which will provide persons with limited income the opportunity to seek help with SSC costs. The District has posted the application and eligibility requirements to the District website: <https://www.mvsd.org/sewer-service-charge-rebate-assistance-program> and mailed out the application to homeowners who submitted letters protesting the proposed rate increase. Eligibility, subject to qualification, is on a first come, first





**Expenditure Distribution**

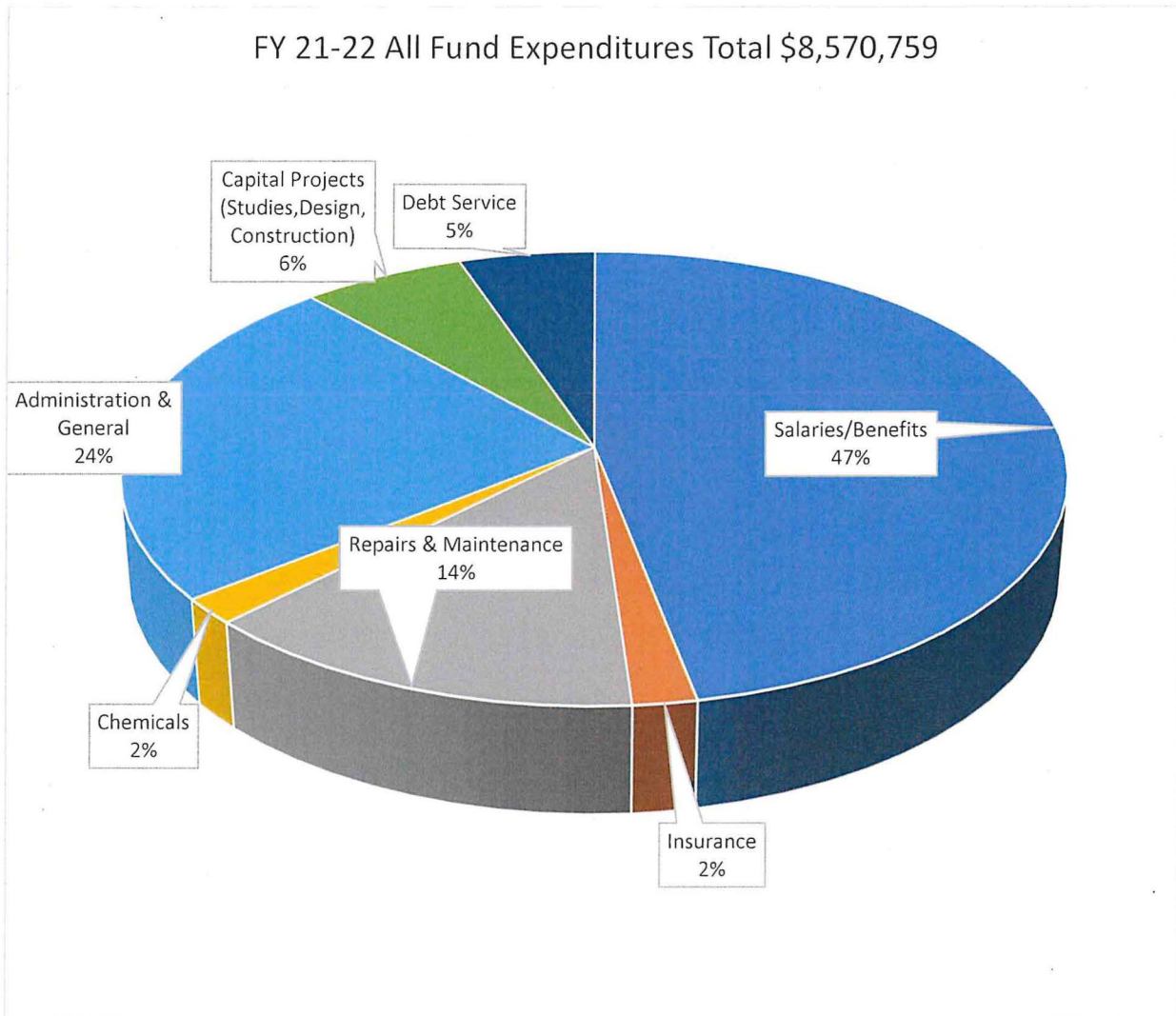
The District has reduced Classic CalPERS personnel benefits by 8% (of salary) since 2015. This was done by eliminating the Employer Paid Member Contribution. The employees now pay their own 8% contribution for retirement pensions. This is a benefit that many sanitary districts continue to provide their employees.

MVSD Salaries and Benefits were 53% of the total expenditures in the Operations & Maintenance (O&M) Fund for FY 21-22 and 48% of total spend across all Funds. CENTRAL SAN spent 54% of their total budget on Salaries and Benefits for FY 21-22. For FY 22-23 MVSD has budgeted 36.1% of total budget for Salaries & Benefits compared

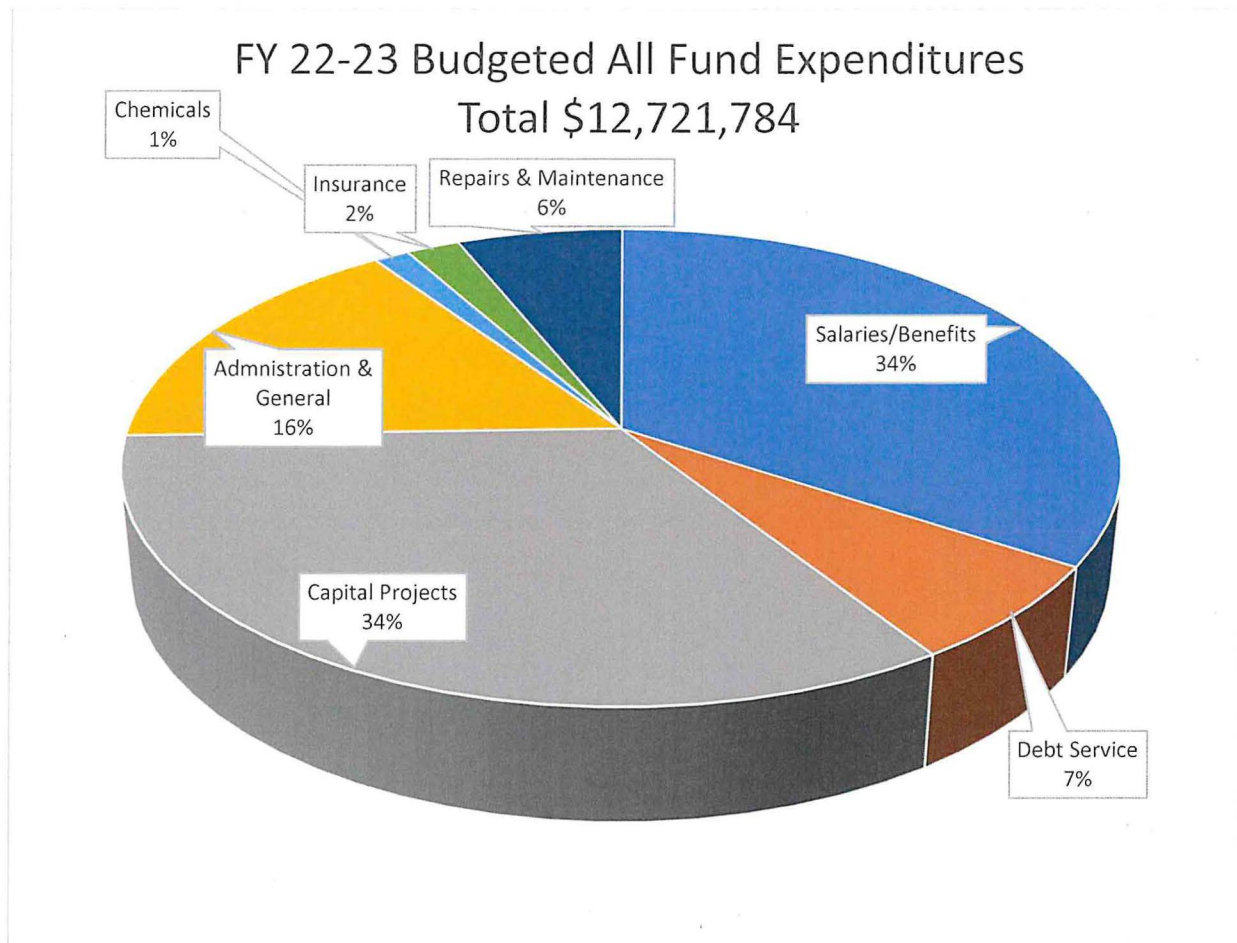
to CENTRAL SAN'S budgeted Salaries & Benefits of 79.6% of the total budget. The MVSD General Manager's salary is 3.3% below the median General Manager salary amongst the comparator agencies serving populations less than 65,000 and 6.2% below the median of the local comparator agencies. The attached salary comparison between MVSD and our nearest neighbor confirms that MVSD salaries are reasonable.

Agencies	Population Served	General Manager FY22-23 Salary
Rodeo Sanitary District	8,679	\$ 225,000
Sanitary District of Marin County #2	10,000	\$ 212,256
Tamalpais Community Services District	10,000	\$ 220,500
Sanitary District of Marin County	14,000	\$ 222,072
Sausalito-Marín City Sanitary District	18,000	\$ 308,436
<b>Mt. View Sanitary District</b>	<b>21,200</b>	<b>\$ 253,836</b>
Las Gallinas Valley Sanitation District	30,000	\$ 279,996
Ironhouse Sanitary District	32,324	\$ 279,444
Novato Sanitary District	51,516	\$ 293,904
Ross Valley Sanitary District	55,000	\$ 270,480
West Bay Sanitary District	55,000	\$ 262,500
Castro Valley Sanitary District	65,000	\$ 258,075
Median	25,600	\$ 260,288
Vallejo Flood and Wastewater District	120,000	\$ 276,739
Fairfield-Suisun Sewer District	135,000	\$ 316,306
Oro Loma Sanitary District	135,000	\$ 279,828
Central Contra Costa Sanitary District	500,000	\$ 339,379
Average	78,795	\$ 268,672
Median	32,324	\$ 270,480
Max	500,000	\$ 339,379
Min	8,679	\$ 212,256

The pie chart below reflects the proportions of expenditures in FY 21-22 across all Funds.



The pie chart below reflects the proportions of budgeted expenditures in FY 22-23 across all Funds.



### Rate Comparisons

A Rate Comparison table is attached. The smaller agencies: Rodeo, Pinole, Sausalito Marin, and Central Marin San tend to have higher rates because they lack the economy of scale and the large rate base afforded the larger agencies.

### Contra Costa Local Agency Formation Commission Review

The Contra Costa Local Agency Formation Commission, or LAFCO, reviews such matters at regular intervals. The last review was conducted in May 2014 and is available on the MVSD website. That review noted the District's need to implement systemic rate increases to meet its long-term capital improvement needs. It also acknowledged that while both MVSD and CENTRAL SAN provide similar services within their boundaries, both districts have indicated that differences in treatment and disposal operations, topography, and cost (real estate acquisition and capital improvements) make consolidation of the two districts fiscally infeasible. Contra Costa County LAFCO is currently conducting a Municipal Service Review of wastewater agencies and expects to complete a draft in April or May 2023. MVSD

completed an Affordability Study for the proposed rates schedule for FY 24 to FY 28. It is attached for your reference.

### **Protests Received by the District**

As of March 23, 2023, the District received two hundred eighty (280) written protests for the proposed rate increase schedule for fiscal year 2023-2024 through 2027-2028. The District mailed out notices for 8301 parcels. This equates to a 3.4% protest rate. No Proposition 218 notices addressed to the owner of record were returned to the District by the US Postal Service as undeliverable.

### **Comparative Effectiveness**

CENTRAL SAN is 77 years old. Their FY22-23 CIP budget is \$91 million. Their permitted dry weather flow is 53.8 MGD. That's \$1.69 million/million gallons treated in capital costs. MVSD is 100 years old. Our FY22-23 CIP budget is \$4.28 million. Our permitted dry weather flow is 3.2 MGD. That's \$1.34 million/million gallons treated in capital costs. Additionally, although CENTRAL SAN serves 25 times the population that MVSD does, they receive approximately 50 times the Ad Valorem Tax that MVSD receives from the County.

### **Attached**

Salary Comparisons

Rate Comparisons

Draft Affordability Study



## Salary Comparisons

MVSD 19 employees, salary range \$77,160 - \$253,836		Vallejo 58 employees, salary range \$66,610 - \$320,563		% Difference of Vallejo over MVSD	Central San 115 employees, salary range \$73,901 - \$367,658		% Difference of Central San over MVSD
	Top Step		Top Step			Top Step	
General Manager	\$253,836	District Manager	\$320,563	26%	General Manager	\$367,658	45%
Deputy General Manager	\$211,500	No Asst DM, 7 dept. directors instead			Deputy General Manager	\$314,077	48%
CFO/Administrative Services Manager	\$174,264	Finance Manager	\$178,442	2%	Finance Manager	\$250,120	44%
Accountant & Financial Analyst	\$124,188	Accountant	\$136,032	10%	Accountant	\$127,725	3%
Administrative Assistant	\$86,052	Administrative Specialist	\$87,236	1%	Administrative Assistant	\$100,509	17%
Executive Assistant/Board Secretary	\$99,960	Administrative Specialist	\$96,277	-4%	Executive Assistant to General Manager	\$116,583	17%
District Engineer	\$207,144	Engineering Manager	\$198,304	-4%	Capital Projects Division Manager	\$238,208	15%
Associate Engineer	\$157,260	Associate Engineer	\$171,303	9%	Associate Engineer	\$170,523	9%
Laboratory Analyst	\$120,336	Laboratory	\$127,353	6%	Chemist II	\$134,486	12%
Public Outreach Coordinator	\$117,300	Community Outreach Coordinator	\$127,353	9%	Community Affairs Representative	\$137,822	17%
Wastewater Operations Manager	\$190,908	Director of Plant Operations & Maintenance	\$214,577	12%	Plant Operations Division Manager	\$238,208	25%
Plant Supervisor	\$125,136	Operations Superintendent	\$160,648	28%	Shift Supervisor	\$159,061	27%
Collections Maintenance Lead	\$120,108	Field Operations Superintendent	\$151,738	26%			
Plant Operator Trainee	\$77,160	Operator Entry Level	\$100,063	30%	Plant Operator Trainee/I	\$110,722	43%
Plant Operator I	\$91,596	Plant Operator II	\$110,319	20%	Plant Operator II	\$118,932	30%
Plant Operator II	\$111,732	Plant Operator III	\$115,836	4%	Plant Operator III	\$130,771	17%
Utility Laborer	\$87,564	Utility Worker	\$105,067	20%	Utility Worker	\$95,953	10%
		<b>Average*</b>		<b>12%</b>		<b>Average*</b>	<b>24%</b>





## **MT. VIEW SANITARY DISTRICT**

**DRAFT**

### **2023 Water/Wastewater Affordability Assessment**

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Prepared for  
Mt. View Sanitary District  
Martinez, California  
March 2023

**MUNICIPAL FINANCIAL SERVICES**

2014 Mann Pkwy Celina, TX 75009



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## List of Abbreviations

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Central San	Central Contra Costa Sanitary District
CDP	Census Designated Place
District	Mt. View Sanitary District
DWR	Department of Water Resources
DUC	Disadvantaged Unincorporated Community
FY	Fiscal year (July 1 to June 30)
FY 24	July 1, 2023 to June 30, 2024
HCF	Hundred Cubic Feet (equal to ~ 748.1 gallons)
mgd	million gallons per day
MHI	Median Household Income
SFR	Single Family Residential
SOI	Sphere of Influence

# Executive Summary

Mt. View Sanitary District (Mt. View Sanitary District or District) seeks to evaluate the affordability of reliable wastewater services for low-income households in its service area. Affordability is commonly measured as a percent of median household income (MHI).

Affordability is measured by the percentage of median household income spent annually on utility (water and wastewater) services. Households paying an amount for water and wastewater services that exceeds the affordability threshold are considered to be paying a cost that is unaffordable.

California passed Assembly Bill 2334 (AB 2334) in its 2011-2012 Legislative Session with the declared purpose "... to ensure that the Department of Water Resources (DWR) includes in the California Water Plan an analysis of water affordability in California and possible mechanisms to increase statewide affordability of reliable drinking water and wastewater services for low-income households."<sup>1</sup>

AB 2334 added Section 10004.8 to the Water Code. Paragraph (d) of that Section deals with affordability in the context of defining subsidization programs to be included in the California Water Plan. Water Code Section 10004.8 (d) is quoted below:

(d) Propose appropriate subsidization programs to make water affordable for high-cost communities. High-cost communities shall include the following:

- (1) Water systems serving disadvantaged communities, defined as communities with a median household income at or below 80 percent of the state median household income, where water rates are more than 2 percent of the median household income.
- (2) Water systems serving communities with a median household income no higher than 120 percent of the state median household income and where more than 10 percent of the population spends more than 2 percent of their income on water.
- (3) Other communities as determined to be appropriate by the department.

Note that while AB 2334 states "It is in the public interest for all households to have access to safe and affordable water for basic needs and to have effective and affordable wastewater treatment", no affordability guidance was provided in the legislation for wastewater utilities in the same way that Water Code Section 10004.8 (d) does for water utilities.

Fitch Ratings calculates an affordability rate to determine the number of people whose bill accounts for an outsized portion of their income. Generally, a combined water-related bill that is greater than 5% of household income (or individually, 2.0% for water, 2.5% for sewer and 0.5% for stormwater) is considered unaffordable.

Based on MHI data from the U.S. Census Bureau QuickFacts website, a range of household incomes were evaluated for the Mt. View Sanitary District service area. MHIs evaluated for the Mt. View Sanitary District service area range from \$44,400 to \$114,400 and are based on the MHI for the City of Martinez. MHI data for the Mt. View Sanitary District service area is not available from the QuickFacts website.

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<sup>1</sup> AB 2334 California Water Plan: drinking water and wastewater services (2011-2012 Legislative Session).

The affordability evaluation for individual water (City of Martinez), individual wastewater (Mt. View Sanitary District), and combined monthly water and wastewater utility bills of \$175 are shown in the table below. The monthly bills are based on water and wastewater rates for FY 24 which, for Mt. View Sanitary District, are not yet adopted.

Based on this affordability evaluation, the following conclusions may be drawn:

1. For the City of Martinez, median household income at 80 percent of the state median household income is approximately \$64,400.
2. Monthly water utility bills for the City of Martinez are approximately 1.88% of \$64,400 MHI which is lower than the 2% State of California affordability threshold;
3. Monthly wastewater utility bills for the Mt. View Sanitary District are approximately 1.37% of \$64,400 MHI which is lower than the 2.5% Fitch Ratings affordability threshold; and
4. Combined monthly water and wastewater utility bills are approximately 3.25% of \$64,400 MHI which is lower than the 5.0% Fitch Ratings affordability threshold.

Table ES-1. Water and Wastewater Utility Bills Affordability Evaluation					
Median Household Income (MHI)	<u>Below City of Martinez Median</u>				<u>Median</u>
City of Martinez Annual Median Household Income [1]	\$114,400	\$114,400	\$114,400	\$114,400	\$114,400
<i>Adjustment for MHIs lower than Martinez MHI</i>	<i>(\$70,000)</i>	<i>(\$60,000)</i>	<i>(\$50,000)</i>	<i>(\$40,000)</i>	
Adjusted Annual Median Household Income	\$44,400	\$54,400	\$64,400	\$74,400	
Statewide California Annual Median Household Income [1]	\$84,100	\$84,100	\$84,100	\$84,100	\$84,100
City of Martinez MHI as a percentage of the State MHI [4]	53%	65%	77%	88%	136%
<b>Monthly Water (Martinez) and Wastewater (MVSD) Bills</b>					
Monthly Water Bill [2]					
¾-inch Meter Charge, \$/month	\$48.00	\$48.00	\$48.00	\$48.00	\$48.00
Water Use Rate, Zone 2, \$/HCF (Hundred Cubic Feet)	\$7.66	\$7.66	\$7.66	\$7.66	\$7.66
Average Monthly Water Use, HCF	7	7	7	7	7
Monthly Water Bill, Single Family	\$101.62	\$101.62	\$101.62	\$101.62	\$101.62
Monthly Wastewater Bill, Single Family [3]	\$74.00	\$74.00	\$74.00	\$74.00	\$74.00
<b>Monthly Water and Wastewater Utility Bill</b>	<b>\$175.62</b>	<b>\$175.62</b>	<b>\$175.62</b>	<b>\$175.62</b>	<b>\$175.62</b>
<b>Combined Monthly Utility Bills and Monthly MHI</b>					
Monthly Water and Wastewater Utility Bill	\$175	\$175	\$175	\$175	\$175
Monthly Mt. View Sanitary District MHI (based on City of Martinez)	\$3,700	\$4,500	\$5,400	\$6,200	\$9,500
<b>Monthly Utility Bills as a Percent of MHI [5]</b>					
Monthly Water Bill, Single Family	2.75%	2.26%	1.88%	1.64%	1.07%
Monthly Wastewater Bill, Single Family	2.00%	1.64%	1.37%	1.19%	0.78%
Combined Monthly Bills, Single Family	4.75%	3.90%	3.25%	2.83%	1.85%
<i>Prepared by: Municipal Financial Services</i>					
[1] Source: U.S. Census Bureau, 2017-2021 5-Year American Community Survey. Value is rounded to the nearest \$100.					
[2] Monthly water bills are for a single family account with a ¾-inch meter using 7 HCF/month (172 gallons per day). Rates are for the City of Martinez were January 1, 2023.					
[3] MVSD monthly wastewater bills for FY 24 are proposed.					
[4] AB-2334 California Water Plan: drinking water and wastewater services (2011-2012) states, "High-cost communities shall include the following: (1) Water systems serving disadvantaged communities, defined as communities with a median household income at or below 80 percent of the state median household income, where water rates are more than 2 percent of the median household income. (2) Water systems serving communities with a median household income no higher than 120 percent of the state median household income and where more than 10 percent of the population spends more than 2 percent of their income on water.					
[5] Fitch calculates an affordability rate to determine the number of people whose bill accounts for an outsized portion of their income. Generally, a combined water-related bill that is greater than 5% of household income (or individually, 2.0% for water, 2.5% for sewer and 0.5% for stormwater) is considered unaffordable. Utilities with 20% or less of their population whose bills are considered high are deemed to have an affordability assessment factor of 'aa'; over 20% to 30%, 'a'; over 30% to 40%, 'bbb'; and over 40%, 'bb'.					

Current and projected water and wastewater utility bills for FY 23 through FY 27 and the affordability evaluation for individual water, individual wastewater, and combined monthly water and wastewater utility bills are shown in the table below. Evaluations for the projected years are based on an estimated MHI value of \$64,400, which is, for the City of Martinez, is approximately 77 percent of the state MHI of \$84,100 (rounded).

**Table ES-2. Projected Water and Wastewater Utility Bills Affordability Evaluation**

	Current	Projected				
	FY 23	FY 24	FY 25	FY 26	FY 27	FY 28
<b>Median Household Income (MHI)</b>						
City of Martinez Annual Median Household Income [1]	\$64,400	\$64,400	\$64,400	\$64,400	\$64,400	\$64,400
Statewide California Annual Median Household Income [1]	\$84,100	\$84,100	\$84,100	\$84,100	\$84,100	\$84,100
City of Martinez MHI as a percentage of the State MHI [4]	77%	77%	77%	77%	77%	77%
<b>Monthly Water and Wastewater Bills</b>						
Monthly Water Bill [2]						
¾-inch Meter Charge, \$/month	\$44.25	\$48.00	\$48.00	\$48.00	\$48.00	\$48.00
Water Use Rate, Zone 2, \$/HCF (Hundred Cubic Feet)	\$6.97	\$7.66	\$7.66	\$7.66	\$7.66	\$7.66
Average Monthly Water Use, HCF	7	7	7	7	7	7
Monthly Water Bill, Single Family	\$93.04	\$101.62	\$101.62	\$101.62	\$101.62	\$101.62
Monthly Wastewater Bill, Single Family [3]	\$67.85	\$74.00	\$81.00	\$88.00	\$96.00	\$105.00
<b>Monthly Water and Wastewater Utility Bill</b>	<b>\$160.89</b>	<b>\$175.62</b>	<b>\$182.62</b>	<b>\$189.62</b>	<b>\$197.62</b>	<b>\$206.62</b>
<b>Combined Monthly Utility Bills and Monthly MHI</b>						
Monthly Water and Wastewater Utility Bill	\$161	\$176	\$183	\$190	\$198	\$207
Monthly Mt. View Sanitary District MHI	\$5,400	\$5,400	\$5,400	\$5,400	\$5,400	\$5,400
<b>Monthly Utility Bills as a Percent of MHI [5]</b>						
Monthly Water Bill, Single Family	1.72%	1.88%	1.88%	1.88%	1.88%	1.88%
Monthly Wastewater Bill, Single Family	1.26%	1.37%	1.50%	1.63%	1.78%	1.94%
Combined Monthly Bills, Single Family	2.98%	3.25%	3.38%	3.51%	3.66%	3.83%

Prepared by: Municipal Financial Services

- [1] Source: U.S. Census Bureau, 2017-2021 5-Year American Community Survey. Value is rounded to the nearest \$100.
- [2] Monthly water bills are for a single family account with a ¾-inch meter using 7 HCF/month (172 gallons per day). Rates for the City of Martinez are as shown in the Notice of Public Hearing for water rate increases effective each January 1 from 2021 to 2024. Rates for January 1, 2025 and onward are the same as for the previous year.
- [3] FY 23 monthly wastewater bills are from MVSD Ordinance No. 2020-129 effective July 1, 2020. Rates for FY 24 and onward are proposed.
- [4] AB-2334 California Water Plan: drinking water and wastewater services (2011-2012) states, "High-cost communities shall include the following: (1) Water systems serving disadvantaged communities, defined as communities with a median household income at or below 80 percent of the state median household income, where water rates are more than 2 percent of the median household income. (2) Water systems serving communities with a median household income no higher than 120 percent of the state median household income and where more than 10 percent of the population spends more than 2 percent of their income on water.
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## Section 1

# Introduction

This introduction describes the organization of the report, the Mt. View Sanitary District service area and sphere of influence, see Figure 1-1, legislation, and industry practices relevant to water and wastewater affordability evaluation, and disadvantaged unincorporated communities in the Mt. View Sanitary District service area.

### 1.1 Organization of the Report

This report is divided into three sections. Section 1 provides an overview of the study objectives. Section 2 presents the affordability evaluation. Section 3 states study limitations.

### 1.2 Mt. View Sanitary District Service Area and Sphere of Influence

Mt. View Sanitary District is an independent district, formed in 1923 pursuant to the Sanitary District Act of 1923 (Health & Safety Code §6400 et seq.). Mt. View Sanitary District serves an estimated population of 22,000 residents consisting of approximately 7,987 residential and 314 commercial, industrial and institutional sewer connections. The District's service area is approximately 4.7 square miles. The District's sphere of influence (SOI) encompasses an additional 1.6 square miles and primarily includes an area of 1.46 square miles of industrially zoned land to the north of the District's boundary as well as an island within the center of the District of 0.14 square miles that is in agricultural use. The SOI area to the north of the District is designated as heavy industrial to the west of I-680 and open space and parks and recreation to the east of I-680.

The District's wastewater collection system is located in the rolling hills in and surrounding Martinez and serves three zones or watersheds. The collection system includes four pumping stations and 73 miles of sewer pipelines ranging in diameter from 6 to 24 inches.

Mt. View Sanitary District provides wastewater collection, treatment, and disposal services for the northeasterly portion of the City of Martinez and adjacent unincorporated lands to the northeast. The plant receives approximately 1.10 million gallons per day during dry weather.

The District collaborates with the Central Contra Costa Sanitary District (Central San) to provide a permanent Household Hazardous Waste Collection facility and disposal services for the central portion of the county. Mt. View Sanitary District has a franchise agreement with Allied Waste (parent company to Republic Services) for Allied Waste to provide trash collection, recycling, and disposal services within the unincorporated area of Mt. View Sanitary District's boundaries. The effluent is comprised of approximately 90% residential and 10% small business waste.

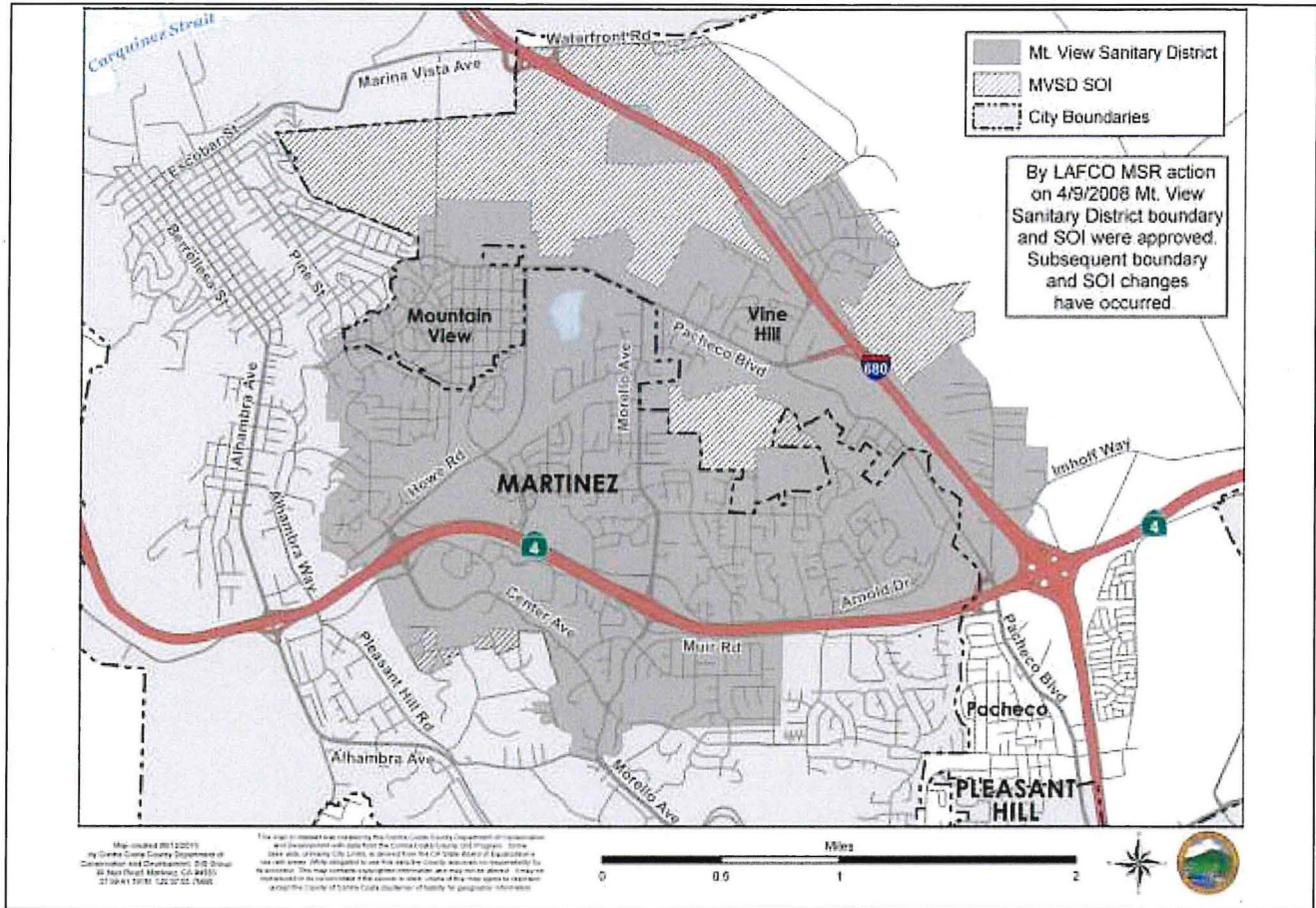


Figure 1-1. Mt. View Sanitary District and Sphere of Influence

### 1.3 California Water Plan and Affordability

Assembly Bill 2334 requires the Department of Water Resources to include an analysis of water affordability and mechanisms to address lack of drinking water (and wastewater services) affordability in California’s Water Plan.

California passed AB 2334 in its 2011-2012 Legislative Session with the declared purpose “... to ensure that the Department of Water Resources includes in the California Water Plan an analysis of water affordability in California and possible mechanisms to increase statewide affordability of reliable drinking water and wastewater services for low-income households.”

AB 2334 added Section 10004.8 to the Water Code. Paragraph (d) of that Section 10004.8 deals with affordability in the context of defining subsidization programs to be included in the California Water Plan. Water Code Section 10004.8 (d) is quoted below:

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- (1) Water systems serving disadvantaged communities, defined as communities with a median household income at or below 80 percent of the state median household income, where water rates are more than 2 percent of the median household income.
- (2) Water systems serving communities with a median household income no higher than 120 percent of the state median household income and where more than 10 percent of the population spends more than 2 percent of their income on water.
- (3) Other communities as determined to be appropriate by the department.

Note that while AB 2334 states “It is in the public interest for all households to have access to safe and affordable water for basic needs and to have effective and affordable wastewater treatment”, no affordability guidance was provided in the legislation for wastewater utilities in the same way that Water Code Section 10004.8 (d) does for water utilities.

## 1.4 Fitch Ratings Water and Sewer Rating Criteria and Affordability

Fitch Ratings publishes a sector-specific criteria report titled "U.S. Water and Sewer Rating Criteria".<sup>2</sup> This criteria report details Fitch Ratings' methodology for assigning Issuer Default Ratings, Standalone Credit Profiles, and issue- and obligation-specific ratings to U.S. municipal water and sewer (including wastewater and stormwater) utilities, whether operating as a stand-alone legal entity or an enterprise of a local government. This rating methodology also applies to certain municipally owned combined utilities, for which water and sewer revenue accounts for, or is expected to account for, the largest share of total revenue on an ongoing basis. An “affordability rate”, as a component of Rate Flexibility, is analyzed as a “Key Ratings Driver” rating tool.<sup>3</sup>

Fitch Ratings calculates an affordability rate to determine the number of people whose bill accounts for an outsized portion of their income. Generally, a combined water-related bill that is greater than 5% of household income (or individually, 2.0% for water, 2.5% for sewer and 0.5% for stormwater) is considered unaffordable.

Utilities with 20% or less of their population whose bills are considered high are deemed to have an affordability assessment factor of ‘aa’; over 20% to 30%, ‘a’; over 30% to 40%, ‘bbb’; and over 40%, ‘bb’. Alternatively, Fitch Ratings may base its calculation on individual or combined charges where one or more of the costs of service are unknown or not applicable using a threshold of 2.0% for water, 2.5% for sewer and 0.5% for stormwater.

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<sup>2</sup> Fitch Ratings' credit ratings provide opinions on the relative ability of an entity to meet its financial commitments.

<sup>3</sup>[http://mwdh2o.com/PDF\\_Who\\_We\\_Are/Fitch%20Report%20\(US%20Water%20and%20Sewer%20Rating%20Criteria,%20April%202020\).pdf](http://mwdh2o.com/PDF_Who_We_Are/Fitch%20Report%20(US%20Water%20and%20Sewer%20Rating%20Criteria,%20April%202020).pdf)

### 1.5 Disadvantaged Unincorporated Communities

Disadvantaged unincorporated communities (DUCs) have been identified in the Mt. View Sanitary District’s sphere of influence in the Vine Hill CDP (Census Designated Place).<sup>4</sup> Located north of the City of Martinez, the Vine Hill CDP is located on the west and east side of I-680. Future annexation of the sphere of influence (SOI) areas by Mt. View Sanitary District or expansion of Mt. View Sanitary District’s SOI contiguous to these DUCs would first require a detailed evaluation of Mt. View Sanitary District’s capability to adequately serve these communities.

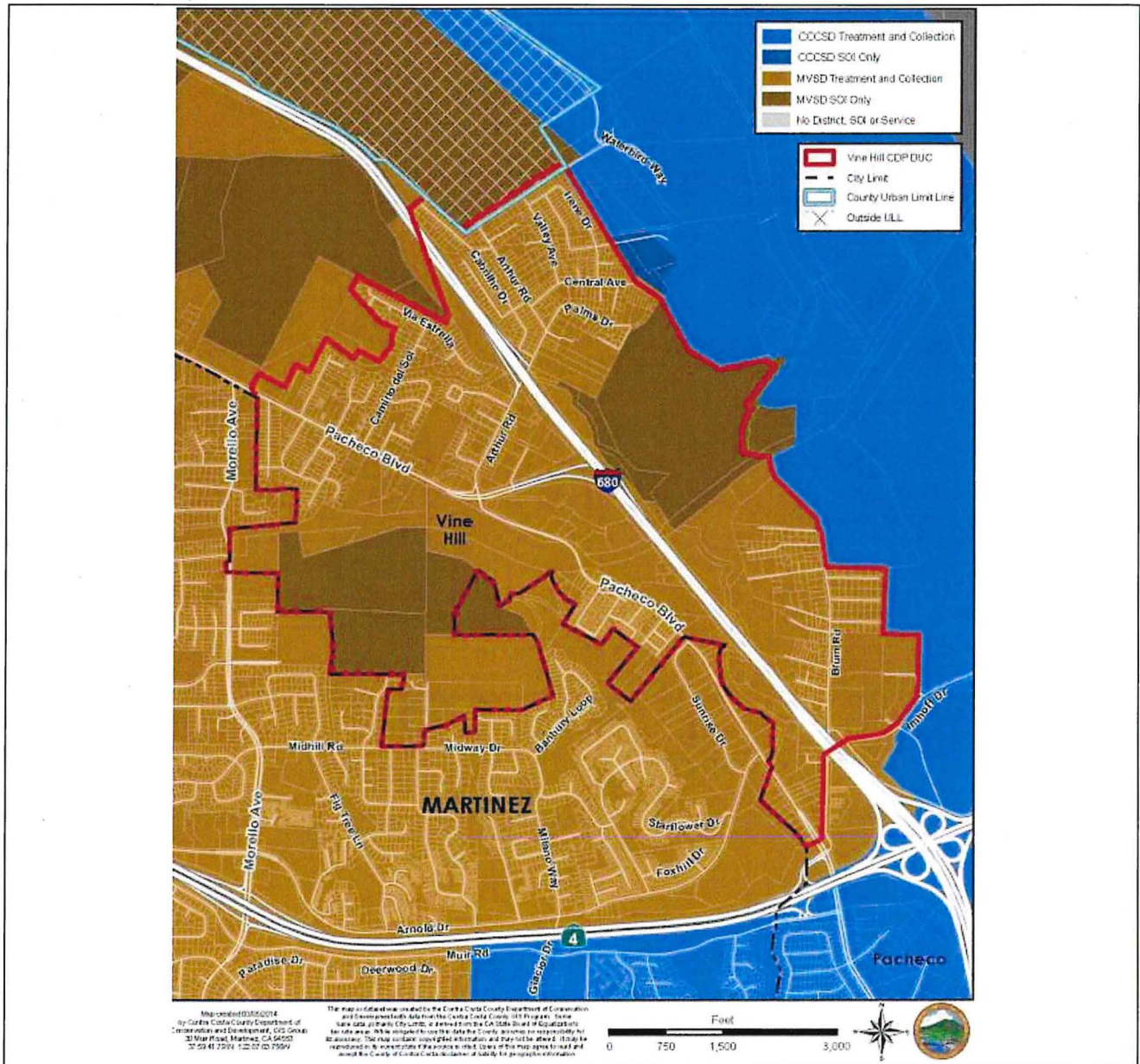


Figure 1-2. Vine Hill Census Designated Place Disadvantaged Unincorporated Communities

<sup>4</sup> The text and the figure in this section are taken from the “Contra Costa County Water and Wastewater Agencies Combined Municipal Service Review and Sphere of Influence Study (2nd Round) Final; Approved May 14, 2014”, pp. 258- 259.

## Section 2

# Affordability Evaluation

Typically, affordability is measured by the percentage of median household income spent annually on utility services (water and wastewater). Households paying an amount for water and wastewater services that exceeds the affordability threshold are considered to be paying a cost that is unaffordable.

## 2.1 Calculation of Water and Wastewater Bills

Monthly water and wastewater bills are calculated using current water rates for the City of Martinez and current wastewater rates for Mt. View Sanitary District.

Monthly water bills are for a Single Family household using 7 HCF of water per month (approximately 172 gallons per day) with a 5/8-inch water meter. FY 24 proposed City of Martinez charges are \$48.00 per month for a 5/8-inch water meter and \$7.66 per HCF (hundred cubic feet, about 748 gallons) for water use in elevation Zone 2. The proposed monthly water bill would be \$101.62.

Currently, Mt. View Sanitary District charges \$67.85 per month (\$814.20 per year) for wastewater service. Mt. View Sanitary District proposed charges for FY 24 are \$74.00 per month (\$888.00 per year).

The total proposed monthly utility bill for a Single Family household for water and wastewater service for FY 24 is \$175.62.

## 2.2 Estimation of Median Household Income

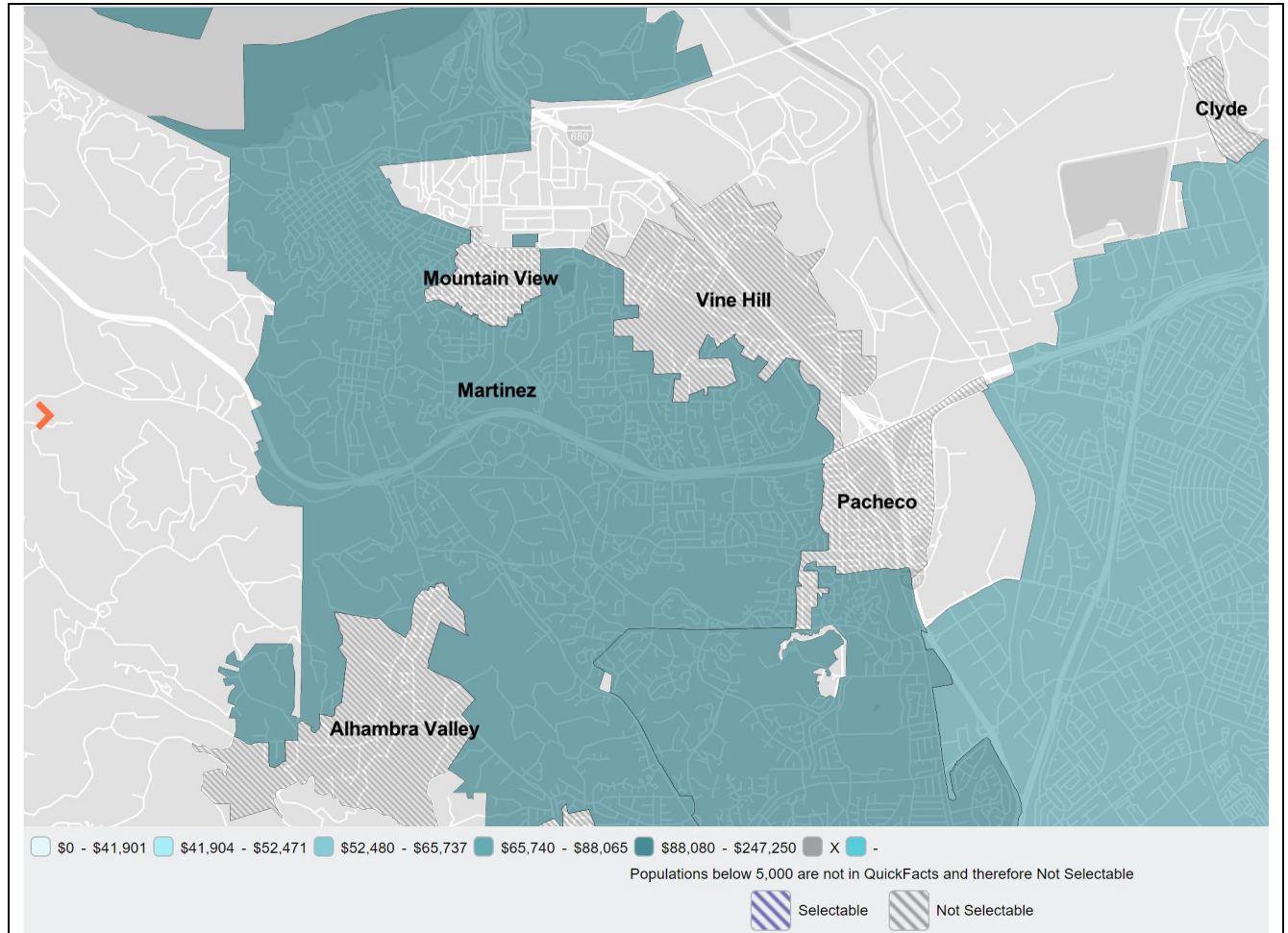
Median Household Income (MHI) was obtained from the U.S. Census Bureau QuickFacts website.<sup>5</sup> QuickFacts is an application that provides tables, maps, and charts of frequently requested statistics from many Census Bureau censuses, surveys, and programs. QuickFacts provides statistics for all states and counties, and for cities and towns with a *population of 5,000 or more*. MHI data for the City of Martinez, Contra Costa County and the State of California are available from the QuickFacts website. MHI data for the Mt. View Sanitary District service area is not available from the QuickFacts website. MHI for the City of Martinez, Contra Costa County, State of California, and the United States are shown below in Table 2-1.

Table 2-1. MHI for the City of Martinez, Contra Costa County, California, and United States

Income & Poverty	Martinez city, California	Contra Costa County, California	California	United States
Population Estimates, July 1 2021, (V2021)	36,819	1,161,413	39,142,991	332,031,554
<b>PEOPLE</b>				
Income & Poverty				
Median household income (in 2021 dollars), 2017-2021	\$114,390	\$110,455	\$84,097	\$69,021

<sup>5</sup> QuickFacts data are derived from: Population Estimates, American Community Survey, Census of Population and Housing, Current Population Survey, Small Area Health Insurance Estimates, Small Area Income and Poverty Estimates, State and County Housing Unit Estimates, County Business Patterns, Nonemployer Statistics, Economic Census, Survey of Business Owners, Building Permits.

MHI data from U.S. Census Bureau QuickFacts website for the City of Martinez and adjacent Contra Costa County – shown below in Figure 2-1 - suggests the range of MHI in the Mt. View Sanitary District service area ranges primarily from approximately \$66,000 to \$88,000.



**Figure 2-1. MHI for the City of Martinez and Adjacent Contra Costa County (U.S. Census QuickFacts)**

## 2.3 Water and Wastewater Utility Bills Affordability Evaluation

MHI evaluated for the Mt. View Sanitary District service area range from \$44,400 to \$114,400 and are based on MHI for the City of Martinez. MHI data for the Mt. View Sanitary District service area is not available from the QuickFacts website. The affordability evaluation for individual water (City of Martinez), individual wastewater (Mt. View Sanitary District), and combined monthly water and wastewater utility bills of \$175 are shown in the table below. The monthly bills are based on water and wastewater rates for FY 24 which, for Mt. View Sanitary District, are not yet adopted.

Table 2-2. Water and Wastewater Utility Bills Affordability Evaluation					
<b>Median Household Income (MHI)</b>	<i>Below City of Martinez Median</i>				<i>Median</i>
City of Martinez Annual Median Household Income [1]	\$114,400	\$114,400	\$114,400	\$114,400	\$114,400
<i>Adjustment for MHIs lower than Martinez MHI</i>	<i>(\$70,000)</i>	<i>(\$60,000)</i>	<i>(\$50,000)</i>	<i>(\$40,000)</i>	
Adjusted Annual Median Household Income	\$44,400	\$54,400	\$64,400	\$74,400	
Statewide California Annual Median Household Income [1]	\$84,100	\$84,100	\$84,100	\$84,100	\$84,100
City of Martinez MHI as a percentage of the State MHI [4]	53%	65%	77%	88%	136%
<b>Monthly Water (Martinez) and Wastewater (MVSD) Bills</b>					
Monthly Water Bill [2]					
¾-inch Meter Charge, \$/month	\$48.00	\$48.00	\$48.00	\$48.00	\$48.00
Water Use Rate, Zone 2, \$/HCF (Hundred Cubic Feet)	\$7.66	\$7.66	\$7.66	\$7.66	\$7.66
Average Monthly Water Use, HCF	7	7	7	7	7
Monthly Water Bill, Single Family	\$101.62	\$101.62	\$101.62	\$101.62	\$101.62
Monthly Wastewater Bill, Single Family [3]	\$74.00	\$74.00	\$74.00	\$74.00	\$74.00
<b>Monthly Water and Wastewater Utility Bill</b>	\$175.62	\$175.62	\$175.62	\$175.62	\$175.62
<b>Combined Monthly Utility Bills and Monthly MHI</b>					
Monthly Water and Wastewater Utility Bill	\$175	\$175	\$175	\$175	\$175
Monthly Mt. View Sanitary District MHI (based on City of Martinez)	\$3,700	\$4,500	\$5,400	\$6,200	\$9,500
<b>Monthly Utility Bills as a Percent of MHI [5]</b>					
Monthly Water Bill, Single Family	2.75%	2.26%	1.88%	1.64%	1.07%
Monthly Wastewater Bill, Single Family	2.00%	1.64%	1.37%	1.19%	0.78%
Combined Monthly Bills, Single Family	4.75%	3.90%	3.25%	2.83%	1.85%
<i>Prepared by: Municipal Financial Services</i>					
[1] Source: U.S. Census Bureau, 2017-2021 5-Year American Community Survey. Value is rounded to the nearest \$100.					
[2] Monthly water bills are for a single family account with a ¾-inch meter using 7 HCF/month (172 gallons per day). Rates are for the City of Martinez were January 1, 2023.					
[3] MVSD monthly wastewater bills for FY 24 are proposed.					
[4] AB-2334 California Water Plan: drinking water and wastewater services (2011-2012) states, "High-cost communities shall include the following: (1) Water systems serving disadvantaged communities, defined as communities with a median household income at or below 80 percent of the state median household income, where water rates are more than 2 percent of the median household income. (2) Water systems serving communities with a median household income no higher than 120 percent of the state median household income and where more than 10 percent of the population spends more than 2 percent of their income on water.					
[5] Fitch calculates an affordability rate to determine the number of people whose bill accounts for an outsized portion of their income. Generally, a combined water-related bill that is greater than 5% of household income (or individually, 2.0% for water, 2.5% for sewer and 0.5% for stormwater) is considered unaffordable. Utilities with 20% or less of their population whose bills are considered high are deemed to have an affordability assessment factor of 'aa'; over 20% to 30%, 'a'; over 30% to 40%, 'bbb'; and over 40%, 'bb'.					

Based on this affordability evaluation, the following conclusions may be drawn:

1. For the City of Martinez, median household income at 80 percent of the state median household income is approximately \$64,400.
2. Monthly water utility bills for the City of Martinez are approximately 1.88% of \$64,400 MHI which is lower than the 2% State of California affordability threshold.
3. Monthly wastewater utility bills for the Mt. View Sanitary District are approximately 1.37% of \$64,400 MHI which is lower than the 2.5% Fitch Ratings affordability threshold; and
4. Combined monthly water and wastewater utility bills are approximately 3.25% of \$64,400 MHI which is lower than the 5.0% Fitch Ratings affordability threshold.





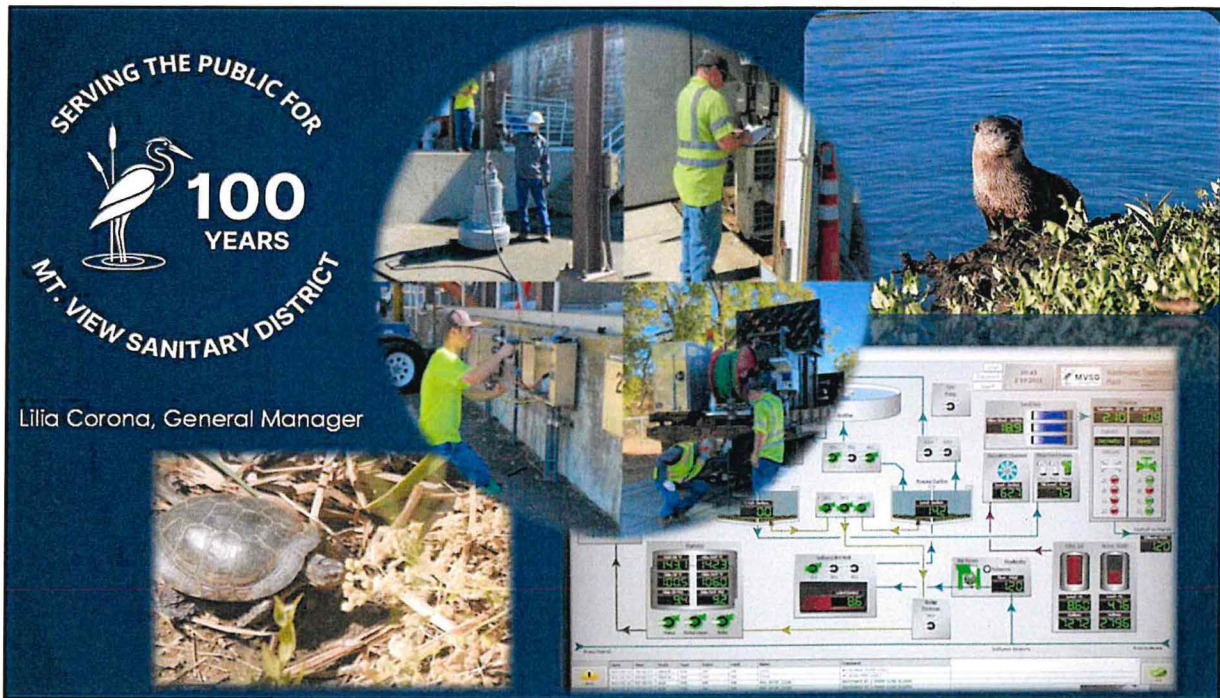
## Section 3

# Limitations

This document was prepared solely for the Mt. View Sanitary District in accordance with professional standards at the time the services were performed and in accordance with Task Order No. 1 to Contract 22-0005 between Mt. View Sanitary District and Municipal Financial Services. This document is governed by the specific scope of work authorized by Mt. View Sanitary District; it is not intended to be relied upon by any other party. We have relied on information or instructions provided by Mt. View Sanitary District and, unless otherwise expressly indicated, have made no independent investigation as to the validity, completeness, or accuracy of such information.

## Appendix A: reserved

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WELCOME. I'M LILIA CORONA, GENERAL MANAGER OF MT. VIEW SANITARY DISTRICT. EFFECTIVE SANITATION IS A CRUCIAL PART OF MAINTAINING PUBLIC HEALTH. UNSAFE SANITATION IS ONE OF THE WORLD'S LARGEST HEALTH AND ENVIRONMENTAL PROBLEMS. THE STAFF AT MT. VIEW SANITARY DISTRICT (MVSD) TAKE PROTECTION OF THE ENVIRONMENT AND PUBLIC HEALTH VERY SERIOUSLY. WE ARE PROUD OF OUR COMPLIANCE RECORD IN TREATING WASTEWATER TO SUBSTANTIALLY LOWER LIMITS THAN MOST NEIGHBORING SANITARY DISTRICTS.

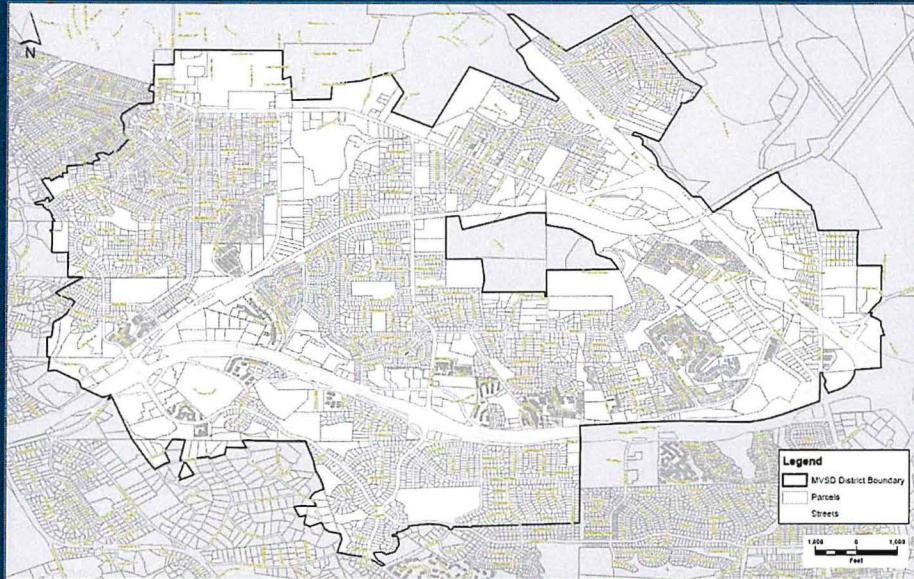
AS A TEAM WE VALUE PROFESSIONALISM, INTEGRITY, AND ACCOUNTABILITY. WE ARE COMMITTED TO PROCESSES THAT PROTECT AGAINST THE MISUSE OF PUBLIC FUNDS. MVSD HAS MAINTAINED THE CALIFORNIA SPECIAL DISTRICT'S ASSOCIATION DISTRICT TRANSPARENCY CERTIFICATE OF EXCELLENCE SINCE 2013. ANNUAL FINANCIAL AUDITS ARE PERFORMED BY 3RD PARTY CERTIFIED PUBLIC ACCOUNTANTS AND ARE POSTED TO OUR WEBSITE. WASTEWATER OPERATORS REQUIRE VERY SPECIFIC TRAINING AND LICENSING FROM THE STATE. SALARIES FOR STAFF AT ALL LEVELS ARE ESTABLISHED AFTER TOTAL COMPENSATION CLASSIFICATION STUDIES ARE PERFORMED TO ENSURE SALARIES ARE REASONABLE AND COMPETITIVE.

I WOULD LIKE TO APPLAUD THE CITIZENS OF MVSD FOR BEING PROACTIVE AND PARTICIPATING IN THIS DEMOCRATIC PROCESS. I AM TRULY IMPRESSED WITH YOUR ORGANIZED EFFORT AND WILL ATTEMPT HERE TO PROVIDE VALUABLE INFORMATION TO ADDRESS YOUR CONCERNS AS THEY HAVE BEEN COMMUNICATED.

TONIGHT, OUR GOALS ARE TO TELL WHO WE ARE, WHAT WE DO, AND ANSWER YOUR QUESTIONS ABOUT THE PROPOSED RATE ADJUSTMENT. OUR MISSION AT MT. VIEW SANITARY DISTRICT IS TO PROTECT THE PUBLIC HEALTH AND ENVIRONMENT, IN A SAFE AND RELIABLE MANNER, AT A REASONABLE COST.

WE PROVIDE WASTEWATER/SEWAGE COLLECTION, CONVEYANCE, TREATMENT, REUSE, AND DISPOSAL FOR OUR SERVICE AREA. SOLID WASTE COLLECTION IS CONTRACTED WITH REPUBLIC SERVICES FOR THE UNINCORPORATED PORTION OF OUR SERVICE AREA.

## MVSD Service Area



OUR SERVICE AREA IS APPROXIMATELY 4.7 SQUARE MILES. THE WASTEWATER COLLECTION SYSTEM SERVES THREE ZONES OR WATERSHEDS AND INCLUDES FOUR PUMPING STATIONS AND 73 MILES OF SEWER PIPELINES.

## MVSD Treatment Plant



THIS IS A BIRD'S EYE VIEW OF THE TREATMENT PLANT.  
THE PLANT TREATS APPROXIMATELY 1.0 MILLION  
GALLONS PER DAY DURING DRY WEATHER.

## Headworks



AS WASTEWATER COMES IN THROUGH THE HEADWORKS, IT ENTERS THROUGH A SERIES OF BAR SCREENS TO REMOVE LARGE DEBRIS THAT COULD DAMAGE THE PLANT'S EQUIPMENT.

## Primary Clarifier



WASTEWATER FLOWS INTO THE PRIMARY CLARIFIER WHERE IT SLOWS DOWN AND THE HEAVY PARTICLES SETTLE TO THE BOTTOM. THE SOLIDS OR SLUDGE ARE PUMPED TO THE SLUDGE THICKENER.

## Biofilter



THE WASTEWATER IS THEN SENT TO THE BIOFILTER, WHICH DISTRIBUTES WATER OVER ROCK MEDIA THAT PROVIDES A HOME FOR THE MICROORGANISMS THAT BREAK DOWN ORGANIC MATERIAL. THE BIOFILTER CONDITIONS MIMIC THE ENVIRONMENT OF ROCKY STREAM BEDS AND OCEAN COASTS.



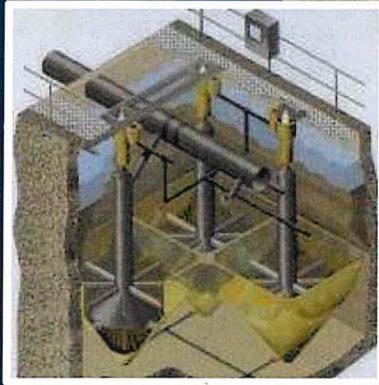
## Biotower



THEN THE WATER PROCEEDS TO THE BIOTOWER, WHICH DISTRIBUTES THE WATER OVER SHEETS OF CORRUGATED PLASTIC MEDIA. BACTERIA LIVING ON THESE SHEETS CONVERTS AMMONIA IN THE WASTEWATER TO NITRATES.

## Secondary Clarifier

### Sand Filter



THE WASTEWATER ENTERS THE SECONDARY CLARIFIER TO AGAIN REMOVE SETTLEABLE SOLIDS AND THEN PROCEEDS TO THE DYNASAND FILTER SYSTEM. THIS SYSTEM IS A CONTINUOUS-BACKWASH, GRANULAR-MEDIA FILTER SYSTEM. THE FILTER MEDIA IS CONTINUOUSLY CLEANED BY RECYCLING THE SAND. THE CLEANSSED SAND IS REDISTRIBUTED ON TOP OF THE SAND BED, ALLOWING FOR CONTINUOUS, UNINTERRUPTED FLOW OF FILTRATE AND BACKWASH WATER.

## UV Disinfection



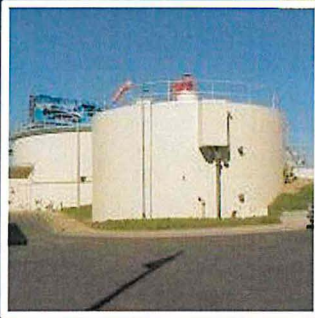
THE WATER IS THEN SENT THROUGH ULTRAVIOLET DISINFECTION. MVSD WAS THE FIRST PUBLICLY OWNED TREATMENT PLANT IN NORTHERN CALIFORNIA TO USE UV DISINFECTION ON A FULL-SCALE OPERATION. THIS PROCESS ELIMINATED THE USE OF HARMFUL CHEMICALS. TREATED WASTEWATER OR EFFLUENT IS THEN DISCHARGED INTO A SERIES OF WETLAND PONDS, MOORHEN MARSH.

## Sludge Thickener



AFTER THE SOLIDS ARE REMOVED FROM THE CLARIFIERS, THEY ARE SENT TO THE SLUDGE THICKENER, A SETTLING TANK TO FURTHER SEPARATE SOLIDS FROM LIQUIDS.

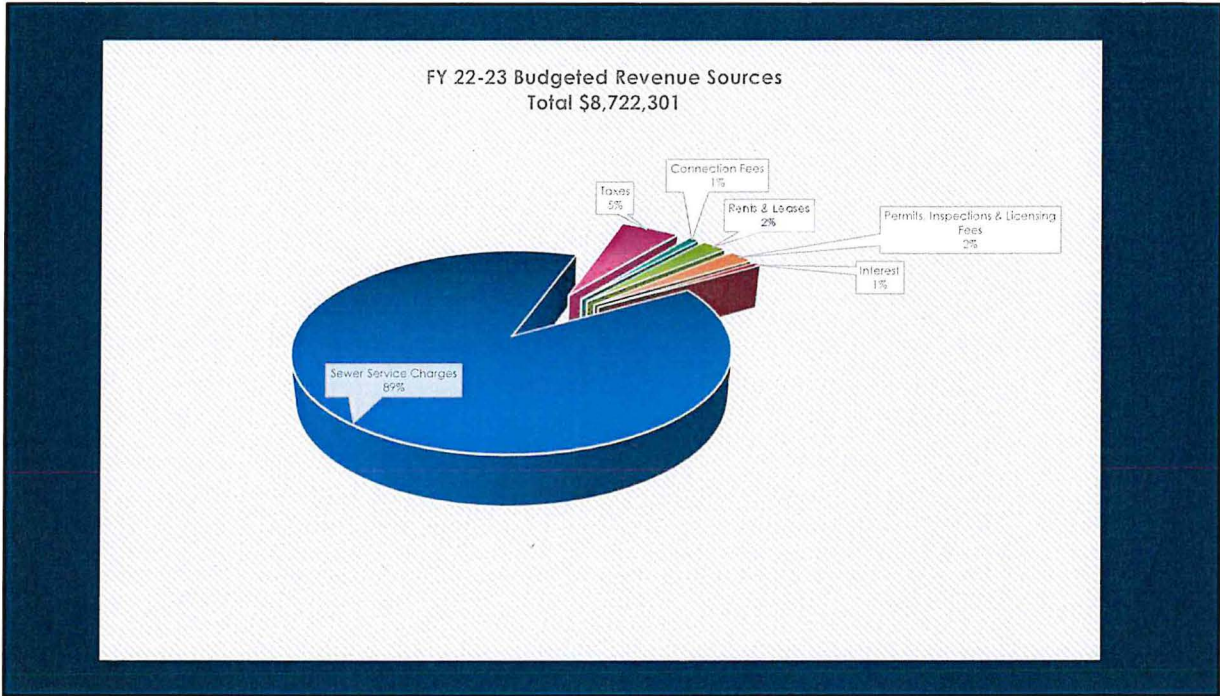
## Digester



SLUDGE SOLIDS ARE PUMPED INTO THE ANAEROBIC DIGESTER WHERE MICROORGANISMS FURTHER BREAK DOWN THE SOLIDS, PRODUCING METHANE GAS. THE METHANE GAS IS USED TO FUEL THE BOILER WHICH MAINTAINS THE DIGESTER TEMPERATURE TO SUPPORT THE MICROORGANISMS. BIOSOLIDS LEAVING THE DIGESTER ARE CENTRIFUGED TO REMOVE ANY EXCESS WATER AND THEN THEY ARE TRUCKED OFF SITE FOR DISPOSAL.



EFFLUENT FROM MVSD IS DISCHARGED INTO A SERIES OF MARSHES, MOORHEN AND MCNABNEY. CREATED IN 1974, MOORHEN MARSH WAS THE FIRST CONSTRUCTED WETLANDS ON THE WEST COAST DEPENDENT SOLELY ON TREATED EFFLUENT FOR ITS WATER SOURCE AND PROVIDES A CRITICAL HABITAT FOR NATIVE PLANTS AND WILDLIFE. THE 21-ACRE WETLAND DISCHARGES TO PEYTON SLOUGH WHICH TRANSPORTS THE TREATED WASTEWATER TO THE CARQUINEZ STRAIT. AND 138-ACRE MCNABNEY MARSH IS A HISTORICAL MARSH THAT WAS RE-EXPOSED TO MUTED TIDAL ACTION IN 2009. MVSD HAS BEEN A JOINT OWNER OF MCNABNEY MARSH WITH EAST BAY REGIONAL PARK DISTRICTS SINCE THE 1980'S.



IN THE ABSENCE OF LOAN PROCEEDS, THE GREAT PREPONDERANCE, 89%, OF REVENUE RECEIVED BY THE DISTRICT IN ANY GIVEN YEAR COMES FROM SEWER SERVICE CHARGES.

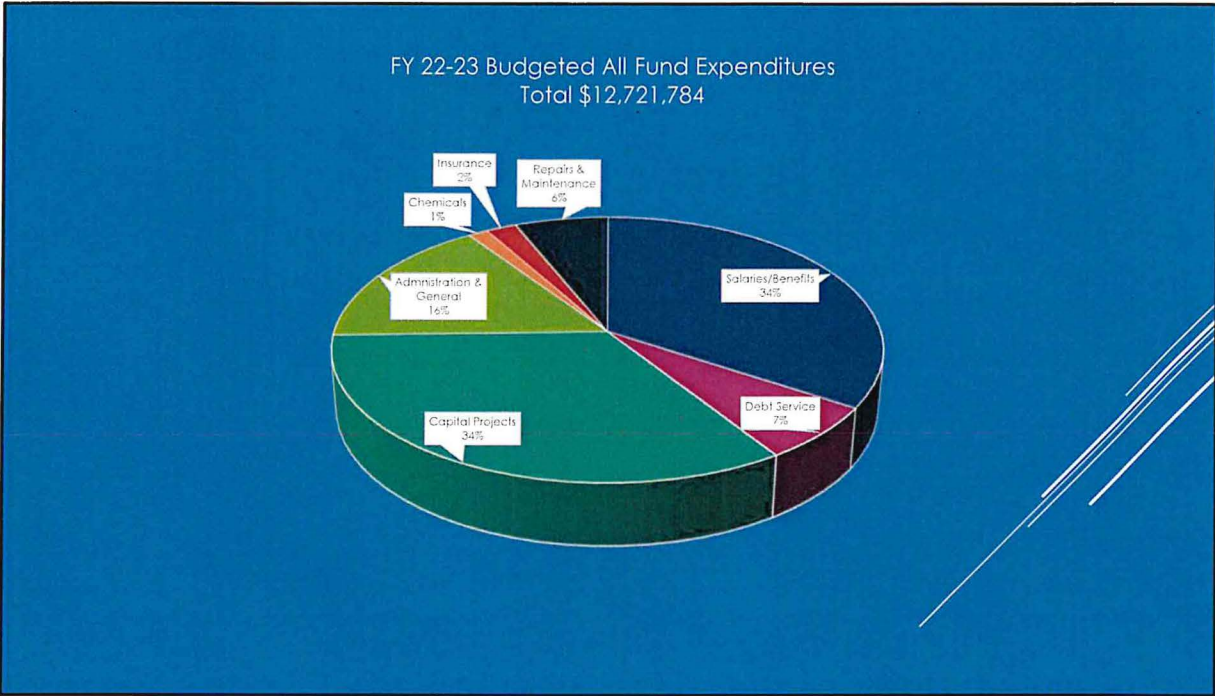
Revenue	% of Total	FY 22-23
<b>Sewer Service Charges</b>	89.0%	\$ 7,762,848
<b>Taxes</b>	5.0%	\$ 436,115
<b>Rents &amp; Leases</b>	2.0%	\$ 174,446
<b>Permits, Inspections &amp; Licensing</b>	2.0%	\$ 174,446
<b>Connection Fees</b>	1.0%	\$ 87,223
<b>Interest</b>	1.0%	\$ 87,223
<b>Total</b>		\$ 8,722,301

### Capital Improvement Plan

Treatment Plant Projects	Est. Total Project Cost	Fiscal Year	Collection System Projects	Est. Total Project Cost	Fiscal Year
<b>Treatment Processes</b>			<b>Pipelines &amp; Manholes</b>		
UV Disinfection Replacement	\$5.49M	23	Pipeline Cleaning & Televising / Condition Assessment Program	\$2.02M	On-going
Plant Improvements	\$5.68M	25-26	888 Howe Road Sanitary Sewer Replacement	\$879K	24
Plant Masterplan	\$775K	24-26	Collection System Improvements Phase 1	\$1.56M	26
Biofilter & Biotower Rehabilitation	\$2.82M	27	Inflow & Infiltration Reduction Program Improvements	\$2.02M	26
Switchgear & Standby Generator Replacement	\$11.3M	29	Collection System Improvements Phase 2	\$1.7M	28
Control Building MCC P1 Replacement	\$2.45M	30	Capacity Improvements Phase A	\$1.29M	28
Sludge Thickener Rehabilitation & Improvements (or Replacement)	\$2.31M	31	Collection System Improvements Phase 3 or West Service Zone Sanitary Sewer Replacement	\$2.9M	30
Headworks Improvements & Automatic Screening Replacement	\$1.95M	33	Capacity Improvements Phase B	\$758K	30
Sand Filters / Compressed Air System / Chemical Systems Rehabilitation	\$2.37M	35	Collection System Improvements Phase 4	\$1.83M	32
<b>Facilities</b>			Collection System Improvements Phase 5	\$1.86M	34
Pavement Management Program	\$20K	30	Collection System Capacity Assessment	\$299K	32
New Operations & Maintenance Building	\$7.19M	37-38	<b>Pump Stations &amp; Force Mains</b>		
			Pump Stations Condition Assessment	\$75K	23
			Pump Stations Rehabilitation & Improvements	\$1.62M	25
			<b>Other/Miscellaneous</b>		
			Iron Adjustments After Street Pavement Projects	\$30K in FY23	On-going

OUR CAPITAL IMPROVEMENT PROGRAM INCLUDES ALL ENGINEERED STUDIES AND PROJECTS RELATED TO IMPROVEMENTS, REPAIRS, REHABILITATION, AND REPLACEMENT OF THE TREATMENT PLANT, COLLECTION SYSTEM, AND MARSH ASSETS. THE 10-YEAR CIP UPDATE IS A PLANNING TOOL THAT INFORMS THE BOARD AND THE PUBLIC ABOUT OUR INFRASTRUCTURE NEEDS, UPCOMING PROJECTS, AND PROPOSED CAPITAL EXPENDITURES. THIS SLIDE LISTS RECENTLY COMPLETED AND ONGOING PROJECTS . HIGHLIGHTS INCLUDE THE PIPELINE CLEANING & TELEVISIONING PHASE 2 AND PUMP STATIONS CONDITION ASSESSMENT PROJECTS WHICH ARE CURRENTLY ONGOING. THE SANDFILTER EVALUATION WAS COMPLETED ALONG WITH THE INFLUENT FLOW METER STUDY AND COLLECTION SYSTEM CAPACITY ASSESSMENT STUDY.

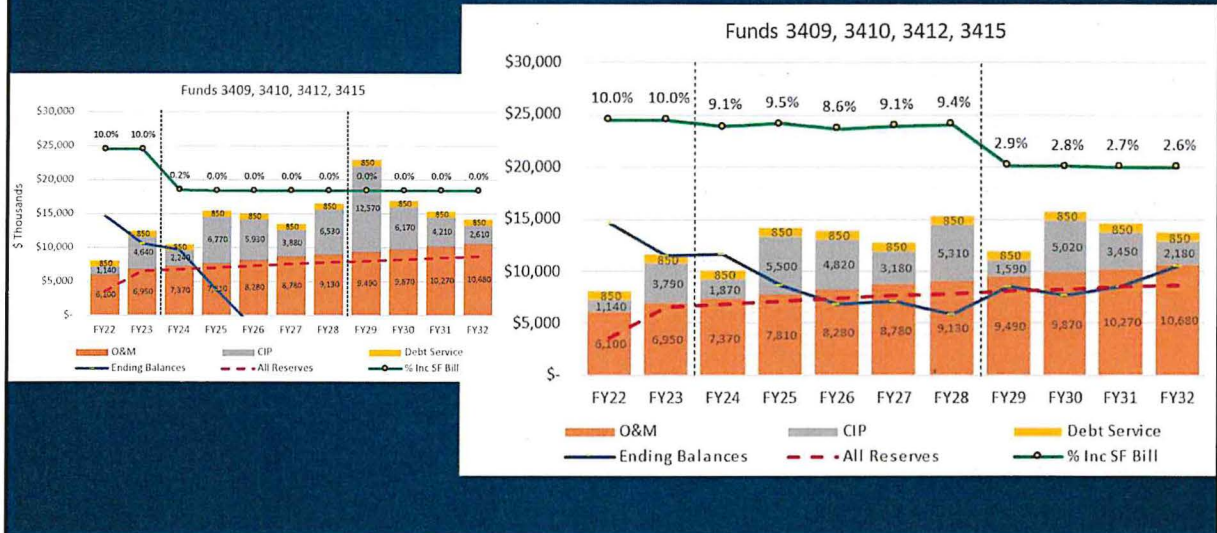




THIS CHART SHOWS THE BUDGETED EXPENSES ACROSS ALL FUNDS FOR FY 22-23.

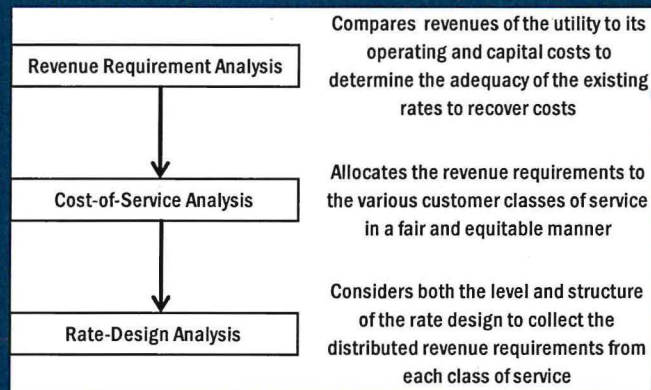
	% of Total FY 22-23	
<b>Salaries/Benefits</b>	<b>34.2%</b>	<b>\$ 4,345,834</b>
<b>Debt Service</b>	<b>6.7%</b>	<b>\$ 846,803</b>
<b>Capital Projects</b>	<b>33.7%</b>	<b>\$ 4,288,300</b>
<b>Admistration &amp; General</b>	<b>15.9%</b>	<b>\$ 2,019,227</b>
<b>Chemicals</b>	<b>1.3%</b>	<b>\$ 170,000</b>
<b>Insurance</b>	<b>2.0%</b>	<b>\$ 257,570</b>
<b>Repairs &amp; Maintenance</b>	<b>6.2%</b>	<b>\$ 794,050</b>
<b>Total</b>		<b>\$ 12,721,784</b>

## Planned Total Expenditures and Resulting All Funds Balance



WHY IS A RATE ADJUSTMENT NEEDED? LOOKING AT THE PLANNED TOTAL EXPENDITURES AND RESULTING FUND BALANCE WITH NO ADDITIONAL RATE INCREASES THE DISTRICT WOULD DROP BELOW THE TARGET RESERVE LEVEL BY THE END OF FY 24.

## KEY ASPECTS TO RATE CALCULATION



The Cost-of-Service Analysis was performed in the 2017 Capacity Charge Study. It established unit costs for flow, biochemical oxygen demand (BOD) and total suspended solids (TSS)\* applicable to all users ensuring the equitable distribution of revenue burden.

*\* BOD and TSS are conventional pollutants removed during wastewater treatment.*

READ THE SLIDE

## Proposed Rates

Customer Class		Billing Units	Current		Recommended Five-Year Plan			
Unit Costs			FY23	FY24	FY25	FY26	FY27	FY28
Flow		\$ per million gallons	\$8,965	\$9,771	\$10,651	\$11,609	\$12,654	\$13,793
BOD		\$ per 1,000 pounds	\$1.18	\$1.29	\$1.40	\$1.53	\$1.67	\$1.82
TSS		\$ per 1,000 pounds	\$1.29	\$1.40	\$1.53	\$1.67	\$1.82	\$1.98
<b>SSCs</b>								
Residential		Annual	\$814.20	\$888	\$972	\$1,056	\$1,152	\$1,260
Apt/MH Units		Annual	\$652.20	\$708	\$768	\$840	\$912	\$996
<b>Nonresidential</b>								
Group 1		\$ per HCF	\$11.04	\$12.05	\$13.15	\$14.35	\$15.65	\$17.05
Group 1A		\$ per HCF	\$11.04	\$12.05	\$13.15	\$14.35	\$15.65	\$17.05
Group 2		\$ per HCF	\$12.12	\$13.20	\$14.40	\$15.70	\$17.10	\$18.65
Group 3		\$ per HCF	\$15.36	\$16.75	\$18.25	\$19.90	\$21.70	\$23.65
Group 4		\$ per HCF	\$16.68	\$18.20	\$19.85	\$21.65	\$23.60	\$25.70
Group 5		\$ per HCF	\$18.96	\$20.65	\$22.50	\$24.55	\$26.75	\$29.15
PMA's		\$ per HCF	\$14.80	\$16.15	\$17.60	\$19.20	\$20.95	\$22.85
VA Clinic		\$ per HCF	\$11.04	\$12.05	\$13.15	\$14.35	\$15.65	\$17.05

THE FINAL 2023 SEWER SERVICE CHARGES STUDY WAS APPROVED BY THE BOARD ON FEBRUARY 9, 2023, AND IS POSTED TO THE MVSD WEBSITE FINANCIAL PAGE. IT DESCRIBES THE PROCESS FOR DETERMINING A 5-YEAR PROPOSED RATE SCHEDULE AND IS INTENDED TO RECOVER REVENUES SUFFICIENT TO ADEQUATELY FUND SEWER UTILITY OPERATIONS, MAINTENANCE, AND CAPITAL REPLACEMENT EXPENDITURES, MEET DEBT SERVICE OBLIGATIONS, KEEP RATES AS COMPETITIVE AS POSSIBLE WHILE MAINTAINING A PRUDENT LEVEL OF RESERVES.

Agencies	Serves	Annual Single Family Residence Rate FY22-23	FY24	FY25	FY26	FY27	FY28	Rate Studies/ Prop 218
Scenic Heights CSD	175	\$ 2,195.00						Underway
Oak Knoll SMD	300	\$ 1,545.00						Underway
Devonshire CSD	700	\$ 1,620.00						Underway
Crystal Springs CSD	3,155	\$ 1,747.00	\$1,834.00					
Burlingame Hills SMD	3,270	\$ 1,892.00	\$1,982.00					
Emerald Lake SMD	4,000	\$ 1,715.00						
Rodeo Sanitary District	8,679	\$ 1,031.52						Planned
Tamalpais Community Services District	10,000	\$ 1,429.86	\$ 1,487.04	\$ 1,546.52	\$ 1,608.40			
SDMC - Tiburon (Marin #5)	14,000	\$ 1,034.00						
SDMC - Belvedere - (Marin #5)	14,000	\$ 1,985.00						
Sausalito-Marín City Sanitary District	18,000	\$ 942.00	\$ 970.00	\$ 999.00				
Sonoma County Water Agency	18,000	\$ 1,148.00						Planned
Mt. View Sanitary District (proposed)	21,200	\$ 814.20	\$ 888.00	\$ 972.00	\$ 1,056.00	\$ 1,152.00	\$ 1,260.00	Underway
Fair Oaks SMD	22,000	\$ 1,015.00						Planned
Cupertino Sanitary District (proposed)	23,000	\$ 699.58	\$ 734.56	\$ 771.29	\$ 809.85	\$ 850.34	\$ 892.86	Underway
Sewer Authority Mid-Coastside	27,000	\$ 970.00						
Las Gallinas Valley Sanitation District	30,000	\$ 1,122.00	\$1,150.00					Underway
Ironhouse Sanitary District	32,324	\$ 916.39	\$ 934.18					Underway
Novato Sanitary District	51,516	\$ 1,181.00	\$1,247.00	\$ 1,284.00	\$ 1,323.00	\$ 1,362.00		
Ross Valley Sanitary District	55,000	\$ 1,146.00	\$1,212.00					
West Bay Sanitary District	55,000	\$ 1,255.00	\$1,280.00	\$ 1,306.00				
Castro Valley Sanitary District	65,000	\$ 481.00						Underway
Vallejo Sanitation and Flood District (average of proposed rates)	120,000	\$ 769.44	\$ 897.36	\$ 1,040.52	\$ 1,161.29	\$ 1,212.47	\$ 1,255.13	Underway
Central San (proposed)	500,000	\$ 690.00	\$ 697.00	\$ 725.00				Underway
Average	45,680	\$ 1,220.47	\$1,177.93	\$ 1,080.54	\$ 1,191.71	\$ 1,144.20	\$ 1,136.00	
Median	19,600	\$ 1,147.00	\$1,150.00	\$ 1,019.76	\$ 1,161.29	\$ 1,182.24	\$ 1,255.13	

ON THIS SLIDE, YOU CAN SEE HOW MVSD'S RATES COMPARE TO OTHER LOCAL AND SIMILAR SIZED DISTRICTS.

## NEXT STEPS

1. We are prepared to take Public Comments following this presentation.
2. To protest the proposed rate increases:
  - Your protest must be in writing and include either the address or parcel number.
  - It must be signed by the property owner on record.
  - Protests must be received prior to or presented at the April 13, 2023, Public Hearing.
  - Letters can be delivered in person, mailed, or emailed to [info@mvsd.org](mailto:info@mvsd.org).

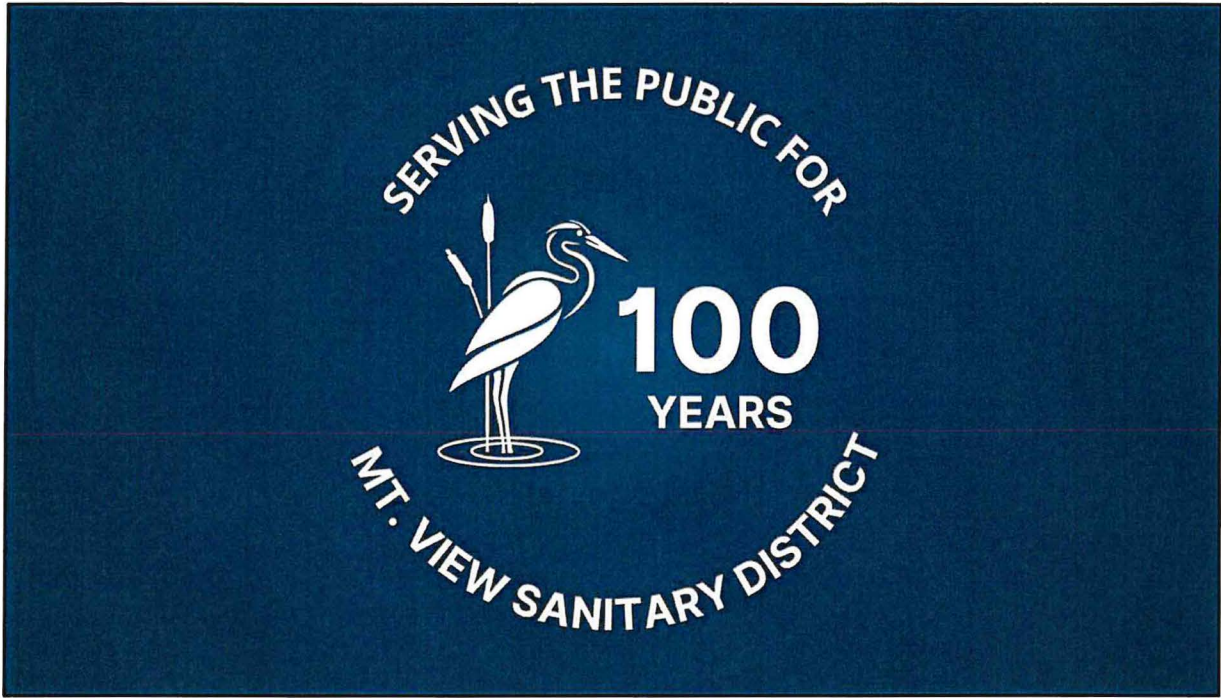
YOUR FEEDBACK IS VERY IMPORTANT TO US. WE ARE PREPARED TO TAKE PUBLIC COMMENTS FOLLOWING THIS PRESENTATION.

HERE ARE THE STEPS THAT YOU CAN TAKE TO MAKE SURE YOUR INPUT COUNTS. TO PROTEST THE PROPOSED RATE ADJUSTMENT, YOUR PROTEST MUST BE IN WRITING. IT MUST INCLUDE EITHER THE ADDRESS OR PARCEL NUMBER AND IT MUST BE SIGNED BY THE PROPERTY OWNER ON RECORD. ELECTRONIC SIGNATURES ARE ACCEPTED. PROTESTS MUST BE RECEIVED BEFORE OR BE PRESENTED AT THE PUBLIC HEARING.

**PUBLIC HEARING  
THURSDAY, APRIL 13<sup>TH</sup> AT 6:30PM**

- The Board will receive public testimony and consider adoption of the proposed rate adjustment.
- After consideration, the Board may...
  - Adopt the rate adjustment as proposed
  - Continue the public hearing to a later date for further consideration
  - Decide not to adjust rates at this time

THE PUBLIC HEARING IS SCHEDULED FOR APRIL 13<sup>TH</sup> AT 6:30PM HERE, IN-PERSON. AT THE PUBLIC HEARING, THE MVSD BOARD WILL RECEIVE PUBLIC TESTIMONY AND CONSIDER ADOPTION OF THE PROPOSED RATE ADJUSTMENT.



I WANT TO THANK YOU FOR COMING TONIGHT. AT THIS TIME, I WILL YIELD TO THE BOARD PRESIDENT FOR PUBLIC COMMENT. PLEASE FEEL FREE TO RAISE YOUR HAND IF YOU WOULD LIKE TO COMMENT OR ASK QUESTIONS.





# PUBLIC OPEN HOUSE

## MEETING AGENDA

<b>3:00pm</b>	<b>Meeting Starts/Guests Sign-in</b>
<b>3:00-3:15pm</b>	<b>Guests Visit Information Stations</b>
<b>3:15-3:45pm</b>	<b>Video/Power Point Presentation</b>
<b>3:45-4:00pm</b>	<b>Public Comment</b>
<b>4:00-4:15pm</b>	<b>Guests Visit Information Stations</b>
<b>4:15-4:45pm</b>	<b>Video/Power Point Presentation</b>
<b>4:45-5:00pm</b>	<b>Public Comment</b>
<b>5:00-5:15pm</b>	<b>Guests Visit Information Stations</b>
<b>5:15-5:45pm</b>	<b>Video/Power Point Presentation</b>
<b>5:45-6:00pm</b>	<b>Public Comment</b>
<b>6:00-6:30pm</b>	<b>Guests Visit Information Stations</b>



# CIP - FISCAL YEAR 2022-2023 UPDATE

## MT. VIEW SANITARY DISTRICT CAPITAL IMPROVEMENT PROGRAM (CIP)

### WHAT IS THE CIP? IT IS A 10-YEAR PLANNING TOOL THAT...

- Encompasses all engineered, larger, and long-term projects and studies related to improvements, repairs, rehabilitation, and replacement of the District's collection system, pump station, plant, and marsh assets
- Informs the Board of Directors and the public about upcoming projects and capital expenditures
- Manifests proactive asset management
- Facilitates financial balance
- Promotes organizational balance
- Is presented to the Board annually for review and adoption (last one adopted on June 9, 2022)

### CURRENT 10-YEAR CIP:

- The CIP will be updated and presented to the Board for review later this year.
- Total estimated project costs across the ten-year plan are \$51.3 million. \$21.4 million in the first five years and \$29.9 million in the final five years.
- The tables summarize the major projects planned for the next ten fiscal years, along with their anticipated timing and estimated total project cost. Some projects beyond the ten-year plan are listed to illustrate all planned phases.

Marsh Projects	Est. Total Project Cost	Fiscal Year
McNabney Marsh Trunk Line Accessibility	\$1.42M	28-29
Moorhen Marsh Complex Maintenance	\$1.44M	29-30

Strategic Initiatives	Est. Total Project Cost	Fiscal Year
Inflow & Infiltration Reduction Program/Wet Weather Flow Management Study	\$304K	23-24/27
Climate Resiliency Study	\$75K	24
Emergency & Cybersecurity Resiliency Study	\$75K	25
Energy Independence Program	\$75K	26

Treatment Plant Projects	Est. Total Project Cost	Fiscal Year
<b>Treatment Processes</b>		
UV Disinfection Replacement	\$5.49M	23
Plant Improvements	\$5.68M	25-26
Plant Masterplan	\$775K	24-26
Biofilter & Biotower Rehabilitation	\$2.82M	27
Switchgear & Standby Generator Replacement	\$11.3M	29
Control Building MCC P1 Replacement	\$2.45M	30
Sludge Thickener Rehabilitation & Improvements (or Replacement)	\$2.31M	31
Headworks Improvements & Automatic Screening Replacement	\$1.95M	33
Sand Filters / Compressed Air System / Chemical Systems Rehabilitation	\$2.37M	35
<b>Facilities</b>		
Pavement Management Program	\$20K	30
New Operations & Maintenance Building	\$7.19M	37-38

Collection System Projects	Est. Total Project Cost	Fiscal Year
<b>Pipelines &amp; Manholes</b>		
Pipeline Cleaning & Televising / Condition Assessment Program	\$2.02M	On-going
888 Howe Road Sanitary Sewer Replacement	\$879K	24
Collection System Improvements Phase 1	\$1.56M	26
Inflow & Infiltration Reduction Program Improvements	\$2.02M	26
Collection System Improvements Phase 2	\$1.7M	28
Capacity Improvements Phase A	\$1.29M	28
Collection System Improvements Phase 3 or West	\$2.9M	30
Service Zone Sanitary Sewer Replacement		
Capacity Improvements Phase B	\$758K	30
Collection System Improvements Phase 4	\$1.83M	32
Collection System Improvements Phase 5	\$1.86M	34
Collection System Capacity Assessment	\$299K	32
<b>Pump Stations &amp; Force Mains</b>		
Pump Stations Condition Assessment	\$75K	23
Pump Stations Rehabilitation & Improvements	\$1.62M	25
<b>Other/Miscellaneous</b>		
Iron Adjustments After Street Pavement Projects	\$30K in FY23	On-going



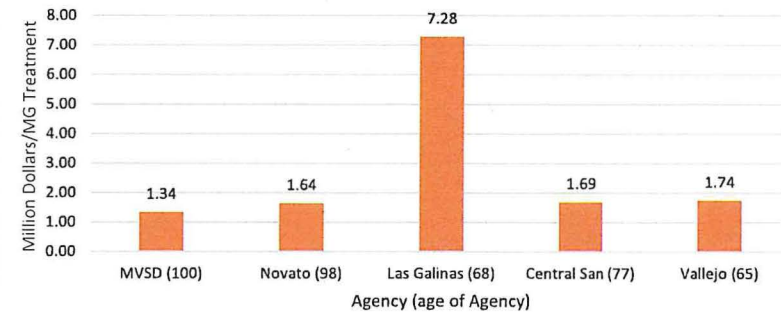
# HOW DO WE COMPARE?

See how Mt. View Sanitary District compares to other districts

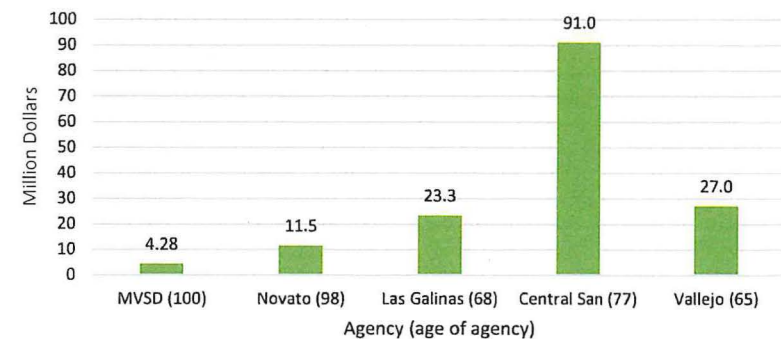
## Rates

Agencies	Serves	Annual Single Family Residence Rate FY22-23	FY24	FY25	FY26	FY27	FY28	Rate Studies/ Prop 218
Scenic Heights CSD	175	\$ 2,195.00						Underway
Oak Knoll SMD	300	\$ 1,545.00						Underway
Devonshire CSD	700	\$ 1,620.00						Underway
Crystal Springs CSD	3,155	\$ 1,747.00	\$ 1,834.00					
Burlingame Hills SMD	3,270	\$ 1,892.00	\$ 1,982.00					
Emerald Lake SMD	4,000	\$ 1,715.00						
Rodeo Sanitary District	8,679	\$ 1,031.52						Planned
Sanitary District of Marin County #2	10,000	\$ 500.00						
Tamalpais Community Services District	10,000	\$ 1,429.86	\$ 1,487.04	\$ 1,546.52	\$ 1,608.40			
SDMC - Tiburon (Marin #5)	14,000	\$ 1,034.00						
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Vallejo Sanitation and Flood District (average of proposed rates)	120,000	\$ 769.44	\$ 897.36	\$ 1,040.52	\$ 1,161.29	\$ 1,212.47	\$ 1,255.13	Underway
Central San (proposed)	500,000	\$ 690.00	\$ 697.00	\$ 725.00				Underway
Average	44,253	\$ 1,202.87	\$ 1,214.88	\$ 1,124.72	\$ 1,287.17	\$ 1,242.16	\$ 1,257.56	
Median	18,000	\$ 1,146.00	\$ 1,181.00	\$ 1,040.52	\$ 1,242.14	\$ 1,212.47	\$ 1,257.56	

CIP Cost per MG Treatment - FY 22/23



Capital Improvement Budget - FY 22/23





# HOW DO WE COMPARE?

See how Mt. View Sanitary District compares to other districts

## Salaries

MVSD 19 employees, salary range \$77,160 - \$253,836		Vallejo 58 employees, salary range \$66,610 - \$320,563		% Difference of Vallejo over MVSD	Central San 115 employees, salary range \$73,901 - \$367,658		% Difference of Central San over MVSD
	Top Step		Top Step			Top Step	
General Manager	\$253,836	District Manager	\$320,563	26%	General Manager	\$367,658	45%
Deputy General Manager	\$211,500	No Asst DM, 7 dept. directors instead			Deputy General Manager	\$314,077	48%
CFO/Administrative Services Manager	\$174,264	Finance Manager	\$178,442	2%	Finance Manager	\$250,120	44%
Accountant & Financial Analyst	\$124,188	Accountant	\$136,032	10%	Accountant	\$127,725	3%
Administrative Assistant	\$86,052	Administrative Specialist	\$87,236	1%	Administrative Assistant	\$100,509	17%
Executive Assistant/Board Secretary	\$99,960	Administrative Specialist	\$96,277	-4%	Executive Assistant to General Manager	\$116,583	17%
District Engineer	\$207,144	Engineering Manager	\$198,304	-4%	Capital Projects Division Manager	\$238,208	15%
Associate Engineer	\$157,260	Associate Engineer	\$171,303	9%	Associate Engineer	\$170,523	9%
Laboratory Analyst	\$120,336	Laboratory	\$127,353	6%	Chemist II	\$134,486	12%
Public Outreach Coordinator	\$117,300	Community Outreach Coordinator	\$127,353	9%	Community Affairs Representative	\$137,822	17%
Wastewater Operations Manager	\$190,908	Director of Plant Operations & Maintenance	\$214,577	12%	Plant Operations Division Manager	\$238,208	25%
Plant Supervisor	\$125,136	Operations Superintendent	\$160,648	28%	Shift Supervisor	\$159,061	27%
Collections Maintenance Lead	\$120,108	Field Operations Superintendent	\$151,738	26%			
Plant Operator Trainee	\$77,160	Operator Entry Level	\$100,063	30%	Plant Operator Trainee/I	\$110,722	43%
Plant Operator I	\$91,596	Plant Operator II	\$110,319	20%	Plant Operator II	\$118,932	30%
Plant Operator II	\$111,732	Plant Operator III	\$115,836	4%	Plant Operator III	\$130,771	17%
Utility Laborer	\$87,564	Utility Worker	\$105,067	20%	Utility Worker	\$95,953	10%
		<b>Average*</b>		<b>12%</b>		<b>Average*</b>	<b>24%</b>

\*Central San's salaries average 24% higher and Las Gallinas Valley Sanitary District's salaries average 13% higher than Mt. View Sanitary District.



# SEWER SERVICE CHARGE REBATE ASSISTANCE PROGRAM

The Mt. View Sanitary District Sewer Service Charge Assistance Program offers a 20% discount, which will be received in the form of a rebate check after all property taxes for the subject parcel have been paid. There are currently two requirements to confirm eligibility: you must own and occupy the residence located within the District's boundaries of Contra Costa County and your annual gross household income cannot be more than the applicable low-income limit below which is dependent on the number of family members.

MVSD SSC REBATE ASSISTANCE PROGRAM - INCOME LIMITS	
Household Size	Annual Income Limit
1-2	\$36,620 or less
3	\$46,060 or less
4	\$55,500 or less
5	\$64,940 or less
6	\$74,380 or less
7	\$83,820 or less
8	\$93,260 or less
9	\$102,700 or less
10	\$112,140 or less
Each additional person, add	\$9,440
<i>*Effective July 1, 2022 - June 30, 2023</i>	

- Only single-family residences which are owner occupied qualify for this program.
- Applications must be completed and submitted by June 30, 2023 for the 2023/2024 tax year.

For an application, visit the information table or go online to [MVSD.org](http://MVSD.org).



Mt. View Sanitary District  
Fiscal Year \_\_\_\_\_

Sewer Service Charge Rebate Application and Eligibility Requirements		
PROPERTY OWNER NAME(S) / PARCEL #:		
PROPERTY ADDRESS:		
CITY:	STATE:	ZIP:
PARCEL NUMBER:		
MAILING ADDRESS (if different from above):		
CITY:	STATE:	ZIP:
PHONE:	E-MAIL:	
NUMBER OF RESIDENTS IN HOUSEHOLD:	GROSS ANNUAL HOUSEHOLD INCOME: \$	
<p>The Sewer Service Charge Rebate Program is based on the total household income of <i>all</i> residents living at the address. Household income is defined as all revenues, from all household members, from whatever source derived, whether taxable or non-taxable, including, but not limited to: wages, salaries, interest, dividends, spousal support and child support payments, public assistance payments, social security and pensions, rental income, income from self-employment, and all employment-related non-cash income. <i>Mt. View Sanitary District reserves the right to request additional documentation if there are questions regarding total income.</i></p>		
ELIGIBILITY DOCUMENTS SUBMITTED & VERIFIED BY MVSD STAFF		
DRIVERS LICENSE OR STATE ID CARD NO. (INCLUDE STATE OF ISSUE):		
DOCUMENTS SUBMITTED FOR PROOF OF INCOME ARE:		
<p style="text-align: center;">             FEDERAL INCOME TAX RETURN <input type="checkbox"/>                  STATE INCOME TAX RETURN <input type="checkbox"/>                  PG&amp;E CARE CUSTOMER <input type="checkbox"/> </p> <p style="font-size: small;">If applicant nor any other member of your household filed state or federal income taxes, please provide copies of year-end statements showing any income received (include taxable and non-taxable) from pensions, interest (i.e., savings accounts), Social Security benefits, etc.</p> <p>OTHER DOCS (LIST):</p>		
SIGNATURE(S):	DATE:	
PRINT NAME:		
<p>Under penalties of perjury, I/we certify that my/our household income is below the established low-income limits. I certify by signing this application that I am the legal owner of the property described herein and that I am eligible to receive low-income rate assistance. I understand that this application is not a promise that a rebate will be provided by the District. The undersigned further understands that providing false representations herein constitutes an act of fraud.</p>		
<b>MAIL Application &amp; Eligibility Docs to: MVSD Rebate, 3800 Arthur Road, Martinez, CA 94553</b> <b>OR EMAIL to: <a href="mailto:info@mvsd.org">info@mvsd.org</a></b>		
<b>GENERAL PROGRAM GUIDELINES</b> 1. Only complete applications that meet the requirements for low-income rate assistance will be accepted and reviewed. 2. Applications will be processed on a first-come, first-served basis. 3. Property owners may only apply for one service charge rebate per parcel per year regardless of the number of units, buildings, or laterals serving the property. 4. Property owners must be either: 1) currently enrolled in PG&E CARE Program or 2) meet Mt. View Sanitary District's eligibility criteria for a low-income household.		
DATE APPLICATION REVIEWED:	DATE APPLICATION APPROVED:	
STAFF SIGNATURE:	STAFF SIGNATURE:	

Warning: This application is subject to verification and any misrepresentations could result in denial of the exemption.