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COUNTY SERVICE AREA 10, MONTE GRANDE 2023-24 ANNUAL REPORT



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Enclosed is the 2023 Annual Report for County Service Area 10 (CSA 10), Monte Grande Heights. The report contains information concerning the planned road maintenance, budget, and funding requirements for fiscal year 2023-24. To determine your assessment charge locate the parcel number on *Exhibit A, 2023-24 Benefit Apportionment Schedule*. **THIS REPORT IS NOT A BILL.**

CSA 10 was established in 1970 by the Tuolumne County Board of Supervisors to provide road maintenance and improvement services. In 2009, CSA 10 property owners voted to approve the assessment with an annual increase equivalent to the construction cost index inflation factor. For fiscal year 2023-24 the inflation factor is 4.9%.

CSAs established prior to 1978 are partially funded by a portion of your property taxes, referred to as *ad valorem taxes*. These taxes are directed into the CSA fund to be used for road maintenance. The ad valorem tax accounted for 33% of annual revenues for CSA 10 in 2022. The remaining revenue is provided through the assessment.

Routine drainage maintenance across the CSA is considered for FY 2023-24. Please note that culverts located beneath driveways are the property of the resident and your responsibility to keep clear of debris.

The purpose of this annual report is to provide information about the administration of CSA 10. If you have any questions regarding your County Service Area please contact the Public Works Department.

SERVICES

Snow removal, road
maintenance, limited
roadway vegetation clearing

Anticipated Maintenance

Routine drainage
maintenance

2.7 LANE MILES

Amario Rd, Monte Grande
Dr, Mount Hope Ln, &
Mountain Side Dr

County Service Area No. 10, Monte Grande Heights Annual Report

I. Background

County Service Area No. 10, Monte Grande Heights (CSA 10) is located near Soulsbyville in Supervisorial District No. 4. The CSA was established on October 27, 1970 by Board of Supervisors Resolution No. 90-70/71 to provide road maintenance and improvement services within its boundaries. A perpetual assessment program was approved by vote of property owners in 2009 (Board Resolution 48-09).

II. Administration

The Tuolumne County Board of Supervisors serves as the Conducting Authority and Board of Directors for the CSA. The Board of Supervisors has directed the Department of Public Works to administer road maintenance activities within the CSA. The 2004 CSA 10 Long-Term Maintenance Plan provides guidelines for administration of the CSA maintenance program. Update to the Long-Term Maintenance Plan is budgeted in 22-23. This funding will remain in CSA account if update is not completed in this fiscal year.

III. Road Inventory

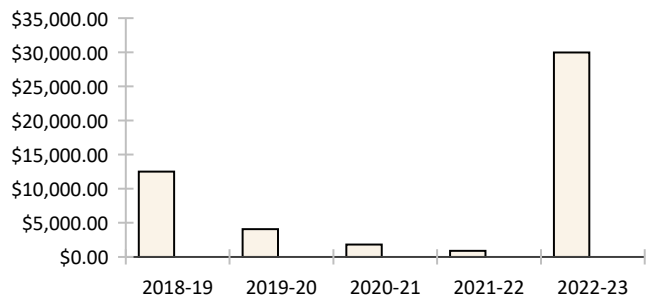
Road Name	Length (ft)	Width (ft)	Length (mi)	Surface	Condition
Armario Road	390	23	0.07	Paved	Fair
Monte Grande Drive	5,640	19.3	1.07	Paved	Fair
Mount Hope Lane	750	10	0.14	Paved	Poor
Mountain Side Drive	1,360	12	0.26	Paved	Poor
TOTAL CSA Road Length (miles):			1.542		

IV. Maintenance Record

Fiscal Yr	Operational Routine Maintenance	Preventative Road Maintenance
2018-19	\$ 12,500.00 Snowplow, Vegetation maint., Drainage, Admin.	
2019-20	\$ 4,070.00 Snowplow, Admin.	
2020-21	\$ 1,800.00 Snowplow, Admin.	
2021-22	\$ 900.00 Snowplow, Admin.	
2022-23	\$ 29,970.00 Snowplow, Tree Removal, Drainage, Admin.	

The maintenance record is categorized into two types of expenses: operational costs and road maintenance costs.

- Operational & routine maintenance costs are routine expenses. Typically, these costs are smaller value items and funded using a current year's budget.
- Preventative road maintenance costs are infrequent maintenance items, scheduled based on pavement condition. Typically, these costs are larger expenses that require multiple years of reserve fund savings (see item X).



V. Revenue

A major source of revenue in CSA 10 is the collection of assessments on each parcel. These charges are determined for each parcel in accordance with the Benefit Assessment Methodology approved by the Board of Supervisors and California Court ruling DJDAR 10675 on July 14, 2008. Another major source of revenue in this CSA is a fixed percentage of County ad valorem property taxes. Most CSAs do not have the ad valorem funding source available to them. The accrual of interest, earned at the same rate as is earned by other County funds, supplements the account.

VI. Assessments

Assessment charges have been apportioned according to CSA Administrative Policies, Section IV, Benefit Assessment Methodology and California Court decision DJDAR 10675 July 14, 2008. For a tabulation of service charges see "Exhibit A", Benefit Apportionment Schedule.

VII. Field Review

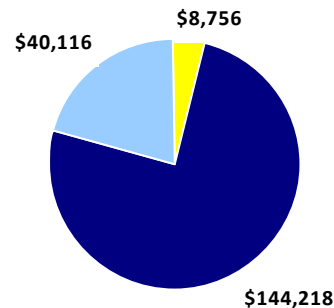
Department of Public Works staff conducted a field review of CSA 10 in March 2023. Drainage repairs were performed in 2022 along Monte Grande Road, in addition to tree and snow removal associated with winter storms. Gutter and overside drainage clearing is planned for upcoming fiscal year.

VIII. Proposed Work Program, FY 2023-24

	Estimated Expenditures
Snow Removal	\$1,600
Snow Removal Contingency*	\$20,760
Road Maintenance: No significant maintenance	\$0
Routine Maintenance	\$15,440
Maintenance Contingency	\$2,316
Work Funds Total:	\$40,116

*Snow Removal Contingency is calculated using largest total winter costs (Winter 2011-12)

Proposed Budget



IX. Administration and Engineering

The County of Tuolumne shall be reimbursed for administrative costs as follows:

	Estimated Expenditures
Administration & Engineering Costs	
Engineering & Administration*	\$7,801
Long-Term Maint Plan Update	\$955
Admin & Eng TOTAL	\$8,756

*Engineering and Administration is estimated as follows:
 \$400 per CSA or PRD plus \$23 per parcel for annual report admin.
 15% of projected expenditures for contract administration
 \$50 for mailing and printing costs

- Admin & Eng
- Reserve
- Work Program: Maint & Contingency

X. Proposed Budget FY 2023-24

(Fiscal year begins July 1)

	Estimated Expenditures	Total
Beginning Fund Balance (estimated)		\$166,000
Revenues (estimated)		
Ad Valorem		\$9,000
Assessment		\$16,390
Interest		\$1,700
Available Funds (estimated)		\$193,090
Expenses (estimated)		
Work Program & Contingency Fees	\$40,116	
Administration & Engineering	\$8,756	
		-\$48,872
Reserve		\$144,218

**County Service Area No. 10, Monte Grande Heights
 Benefit Apportionment Methodology**

Benefit Assessment Methodology

This paper presents the apportionment of costs for road maintenance services for individual parcels in County Service Area No.10, Monte Grande Heights (CSA 10) based on the benefit the parcel receives. The apportionment has been calculated in accordance with the Benefit Assessment Methodology approved by the Tuolumne County Board of Supervisors and California Supreme Court rulings.

Annual Revenue

The annual revenue required to fund road maintenance in CSA 10 was determined in the Long-term Maintenance Plan prepared for this service area by a Professional Engineer.

Annual Revenue Requirement	=	\$16,390
Number of Assessable Parcels	=	58

Benefit Components

The revenue requirement is apportioned between benefit components as shown below:

<u>Benefit Component</u>	<u>Type of Benefit</u>
1) Zone	Road type and location
2) Road Usage	Distance and traffic

The community component is no longer a factor in CSA 10 apportionment calculations per DJDAR 10675 ruling.

Zone Component

One road system currently exists in this service area. The zone component is the same for all parcels within the service area. Maintenance cost for the zone can be estimated according to the total length of the road in the zone as shown below:

<u>Zone of Benefit</u>	<u>CSA Road Length</u>	<u>Percentage of CSA Total</u>	<u>Allocation to Zone</u>
Zone A	8,140 L.F.	100%	\$16,390
Total	8,140 L.F.	100%	\$16,390

Road Usage Component

Estimated road usage for each parcel is determined according to traffic and distance factors calculated for that parcel. These factors may change from year to year as the property is developed. Traffic and distance factors are shown on the Apportionment Schedule.

Apportionment Schedule

The attached Apportionment Schedule shows how the individual parcel assessments are calculated.

**County Service Area No. 10, Monte Grande Heights
2023-24 Benefit Apportionment Schedule**

To identify your parcel's assessment charge locate the parcel number in the table below. **This report is not a bill.** Parcel charge will be added as line item on yearly property tax billing.

Assessors Parcel Number	Mobile Homes 5.4 VPD	Single-Family Res. 10 VPD	Multi-Family Res. 14.8 VPD	Vacant Lot 1 VPD	Traffic Factor*	Distance Factor**	Road Use Factor	Parcel Allocation	Zone Cost	Parcel Assessment
067-140-005-000		1			10.0	x	0.216 = 2.16	2.16 / 300.92 x	\$16,390 =	\$118
067-140-006-000		1			10.0	x	0.108 = 1.08	1.08 / 300.92 x	\$16,390 =	\$59
067-140-007-000		1			10.0	x	0.341 = 3.41	3.41 / 300.92 x	\$16,390 =	\$186
067-140-008-000		1			10.0	x	0.294 = 2.94	2.94 / 300.92 x	\$16,390 =	\$160
067-140-012-000				1	1.0	x	0.163 = 0.16	0.16 / 300.92 x	\$16,390 =	\$9
067-140-013-000		1			10.0	x	0.284 = 2.84	2.84 / 300.92 x	\$16,390 =	\$155
067-140-014-000	1				5.4	x	0.180 = 0.97	0.97 / 300.92 x	\$16,390 =	\$53
067-140-015-000	1				5.4	x	0.159 = 0.86	0.86 / 300.92 x	\$16,390 =	\$47
067-160-001-000	†	1			10.0	x	0.076 = 0.76	0.76 / 300.92 x	\$16,390 =	\$41
067-160-001-000	†	1			5.4	x	0.076 = 0.41	0.41 / 300.92 x	\$16,390 =	\$22
067-160-002-000	1				5.4	x	0.379 = 2.05	2.05 / 300.92 x	\$16,390 =	\$111
067-160-004-000	1				5.4	x	0.379 = 2.05	2.05 / 300.92 x	\$16,390 =	\$111
067-160-009-000		1			10.0	x	0.379 = 3.79	3.79 / 300.92 x	\$16,390 =	\$206
067-160-010-000		1			10.0	x	0.379 = 3.79	3.79 / 300.92 x	\$16,390 =	\$206
067-160-011-000			1		14.8	x	0.379 = 5.61	5.61 / 300.92 x	\$16,390 =	\$305
067-210-002-000		1			10.0	x	0.494 = 4.94	4.94 / 300.92 x	\$16,390 =	\$269
067-210-003-000				1	1.0	x	0.455 = 0.46	0.46 / 300.92 x	\$16,390 =	\$25
067-210-004-000		1			10.0	x	0.400 = 4.00	4.00 / 300.92 x	\$16,390 =	\$218
067-210-005-000		1			10.0	x	0.464 = 4.64	4.64 / 300.92 x	\$16,390 =	\$253
067-210-006-000		1			10.0	x	0.530 = 5.30	5.30 / 300.92 x	\$16,390 =	\$289
067-210-008-000		1			10.0	x	0.536 = 5.36	5.36 / 300.92 x	\$16,390 =	\$292
067-210-009-000	1				5.4	x	0.360 = 1.94	1.94 / 300.92 x	\$16,390 =	\$106
067-210-010-000		1			10.0	x	0.515 = 5.15	5.15 / 300.92 x	\$16,390 =	\$281
067-210-011-000	1				5.4	x	0.498 = 2.69	2.69 / 300.92 x	\$16,390 =	\$147
067-210-012-000		1			10.0	x	0.479 = 4.79	4.79 / 300.92 x	\$16,390 =	\$261
067-220-001-000		1			10.0	x	0.297 = 2.97	2.97 / 300.92 x	\$16,390 =	\$162
067-220-002-000		1			10.0	x	0.559 = 5.59	5.59 / 300.92 x	\$16,390 =	\$304
067-220-003-000		1			10.0	x	0.587 = 5.87	5.87 / 300.92 x	\$16,390 =	\$320
067-220-004-000		1			10.0	x	0.621 = 6.21	6.21 / 300.92 x	\$16,390 =	\$338
067-220-005-000		1			10.0	x	0.682 = 6.82	6.82 / 300.92 x	\$16,390 =	\$371
067-220-006-000				1	1.0	x	0.597 = 0.60	0.60 / 300.92 x	\$16,390 =	\$33
067-220-007-000		1			10.0	x	0.667 = 6.67	6.67 / 300.92 x	\$16,390 =	\$363
067-220-008-000		1			10.0	x	0.670 = 6.71	6.71 / 300.92 x	\$16,390 =	\$365
067-220-009-000				1	1.0	x	0.669 = 0.67	0.67 / 300.92 x	\$16,390 =	\$36
067-220-012-000				1	1.0	x	0.591 = 0.59	0.59 / 300.92 x	\$16,390 =	\$32
067-220-013-000	†	1			10.0	x	0.640 = 6.40	6.40 / 300.92 x	\$16,390 =	\$349
067-220-013-000	†			1	1.0	x	0.640 = 0.64	0.64 / 300.92 x	\$16,390 =	\$35
067-230-001-000		1			10.0	x	1.023 = 10.23	10.23 / 300.92 x	\$16,390 =	\$557
067-230-002-000		1			10.0	x	1.055 = 10.55	10.55 / 300.92 x	\$16,390 =	\$575
067-230-003-000		1			10.0	x	1.083 = 10.83	10.83 / 300.92 x	\$16,390 =	\$590
067-230-004-000		1			10.0	x	1.114 = 11.14	11.14 / 300.92 x	\$16,390 =	\$606
067-230-007-000		1			10.0	x	1.038 = 10.38	10.38 / 300.92 x	\$16,390 =	\$565
067-230-008-000		1			10.0	x	1.009 = 10.10	10.10 / 300.92 x	\$16,390 =	\$550
067-230-010-000		1			10.0	x	1.074 = 10.74	10.74 / 300.92 x	\$16,390 =	\$585
067-230-012-000		1			10.0	x	1.114 = 11.14	11.14 / 300.92 x	\$16,390 =	\$607
067-240-002-000		1			10.0	x	0.805 = 8.05	8.05 / 300.92 x	\$16,390 =	\$438
067-240-003-000				1	1.0	x	0.909 = 0.91	0.91 / 300.92 x	\$16,390 =	\$50
067-240-007-000		1			10.0	x	0.875 = 8.75	8.75 / 300.92 x	\$16,390 =	\$477

2023-24 Benefit Apportionment Schedule

To identify your parcel's assessment charge locate the parcel number in the table below. **This report is not a bill.** Parcel charge will be added as line item on yearly property tax billing.

Assessors Parcel Number	Mobile Homes 5.4 VPD	Single-Family Res. 10 VPD	Multi-Family Res. 14.8 VPD	Vacant Lot 1 VPD	Traffic Factor*	Distance Factor**	Road Use Factor	Parcel Allocation	Zone Cost	Parcel Assessment	
067-240-011-000		1			10.0	x	0.970 =	9.70	9.70 / 300.92 x	\$16,390 = \$528	
067-240-012-000			1		14.8	x	0.996 =	14.74	14.74 / 300.92 x	\$16,390 = \$803	
067-240-017-000		1			10.0	x	0.947 =	9.47	9.47 / 300.92 x	\$16,390 = \$516	
067-240-019-000 †				1	1.0	x	0.913 =	0.91	0.91 / 300.92 x	\$16,390 = \$50	
067-240-019-000 †		1			10.0	x	0.938 =	9.38	9.38 / 300.92 x	\$16,390 = \$511	
067-240-019-000 †				1	1.0	x	0.979 =	0.98	0.98 / 300.92 x	\$16,390 = \$53	
067-240-024-000				1	1.0	x	0.485 =	0.49	0.49 / 300.92 x	\$16,390 = \$26	
067-240-025-000				1	1.0	x	0.466 =	0.47	0.47 / 300.92 x	\$16,390 = \$25	
067-240-026-000				1	1.0	x	0.500 =	0.50	0.50 / 300.92 x	\$16,390 = \$27	
067-240-027-000		1			10.0	x	0.410 =	4.10	4.10 / 300.92 x	\$16,390 = \$223	
067-250-002-000				1	1.0	x	0.831 =	0.83	0.83 / 300.92 x	\$16,390 = \$45	
067-250-005-000		1			10.0	x	0.856 =	8.56	8.56 / 300.92 x	\$16,390 = \$466	
067-250-009-000		1			10.0	x	0.831 =	8.31	8.31 / 300.92 x	\$16,390 = \$453	
067-250-010-000		1			10.0	x	0.782 =	7.82	7.82 / 300.92 x	\$16,390 = \$426	
Parcels:	58				Total road use:			300.92	trip-miles	TOTAL:	\$16,390

*Traffic factor (average daily trips) is based number of lots, zoning and use

**Distance factor (miles) is the distance from parcel to county road

TRA 72-005 72-002 72-004

† Multiple lots included in a single APN