

# **CITY OF LODI 2022 MUNICIPAL SERVICE REVIEW AND SPHERE OF INFLUENCE PLAN**

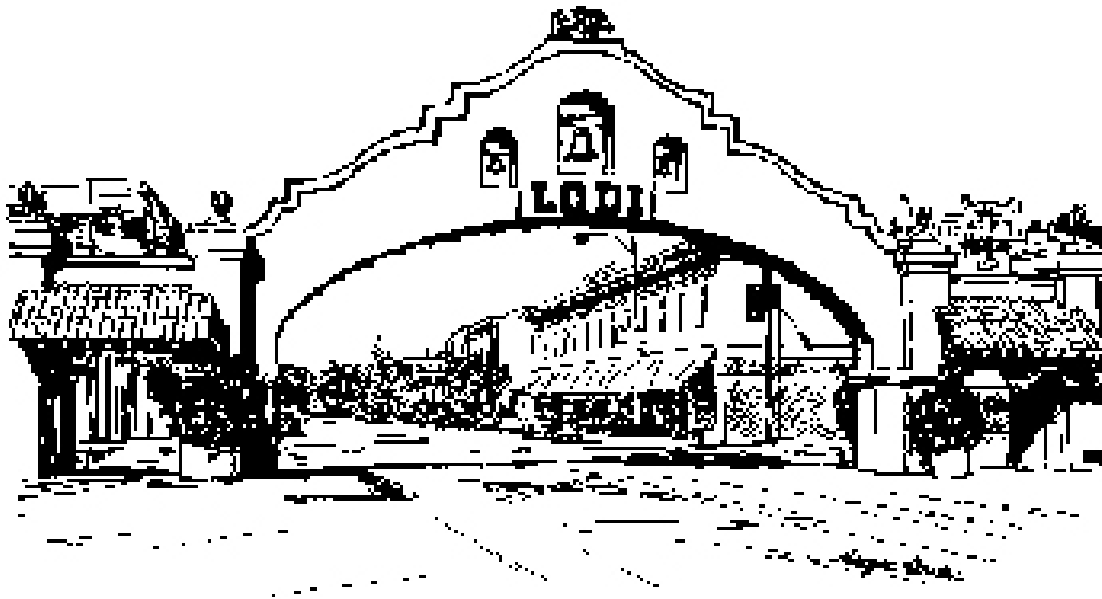


**Prepared by the City of Lodi  
for San Joaquin LAFCO**

**July 2022**

**PUBLIC REVIEW DRAFT**

**2022 LODI MUNICIPAL SERVICE REVIEW AND  
SPHERE OF INFLUENCE UPDATE**



Prepared by the City of Lodi  
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Lodi, CA 95240

June 2022

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**CITY OF LODI**  
**MUNICIPAL SERVICES REVIEW**  
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## **1 INTRODUCTION**

This Municipal Services Review (MSR) was prepared by the City of Lodi (the City) for the San Joaquin Local Agency Formation Commission (LAFCo) in compliance with the 2000 Cortese-Knox-Hertzberg Act, which requires each LAFCo to prepare service reviews prior to establishing or updating spheres of influence (SOI).

According to LAFCo policies, the purpose of an MSR is to evaluate the provision of services from a comprehensive perspective and recommend actions, when necessary, to promote the efficient provision of those services. This MSR must define the probable 30-year boundary of its service area and the agency's sphere horizons at the end of the 10 and 30-year time period coordinated with this MSR.

In 2007, LAFCo approved the existing MSR and Sphere of Influence for the City of Lodi. This 2007 MSR included recently added annexations from 2006 and 2007. After this approval, the City of Lodi approved the 2010 General Plan. The 2010 General Plan identifies land to provide for potential growth during the next 20 years and beyond. Figure 1-2: SOI below, is a map showing the existing SOI and City limit boundaries, the 2010 Lodi General Plan boundaries. The 10-year sphere horizon and the thirty-year sphere horizon boundaries are provided in section *B. Sphere of Influence* below.

### **A. Planning Area**

State law allows cities to identify a Planning Area. This is an area outside of city boundaries and generally outside the SOI that bears a relation to the City's planning and policy direction.

The City of Lodi Planning Area covers 79.4 square miles, or 50,827 acres. This land area is dominated by vineyards and agriculture. Development in the Planning Area is concentrated in the urbanized areas: within Lodi city limits and Woodbridge, a community contiguous to Lodi and within Lodi's SOI; and in Flag City, an unincorporated commercial center at the junction of I-5 and SR-12. (See Figure 1-1 below)

Map of the Planning Area, Lodi Sphere of Influence (2008), and City Limits (2008). The map shows a grid of streets, including major roads like I-580 and SR 99. Key features include the 'Planning Area' (dashed blue line), 'Lodi Sphere of Influence (2008)' (dotted line), and 'City Limits (2008)' (solid black line). The map also shows the 'White Slough' and 'Woodbridge' area. A legend in the bottom right corner defines the line styles. A scale bar and north arrow are also present.

## ***B. Sphere of Influence***

The Sphere of Influence (SOI) is the area outside of the City limits that the City expects to annex and urbanize in the future. It is the expected physical limit of the City based on the most current information.

Figure 1-2 illustrates the current City limits and the existing SOI, as well as the proposed areas for the 10-Year and 30-Year Horizons. The boundaries of the 10-year horizon will be expanded to include the Phase I areas in the south-east quadrant which is generally bound by East Kettleman Lane to the north, East Hogan Lane to the south, Central California Traction Company Railroad (CCTRR) to the east, and Golden State (Hwy 99) to the west. The boundaries of the 30-year horizon will be expanded to include the Phase II areas in the south-east quadrant.



### Figure 1-2: Spere of Influence

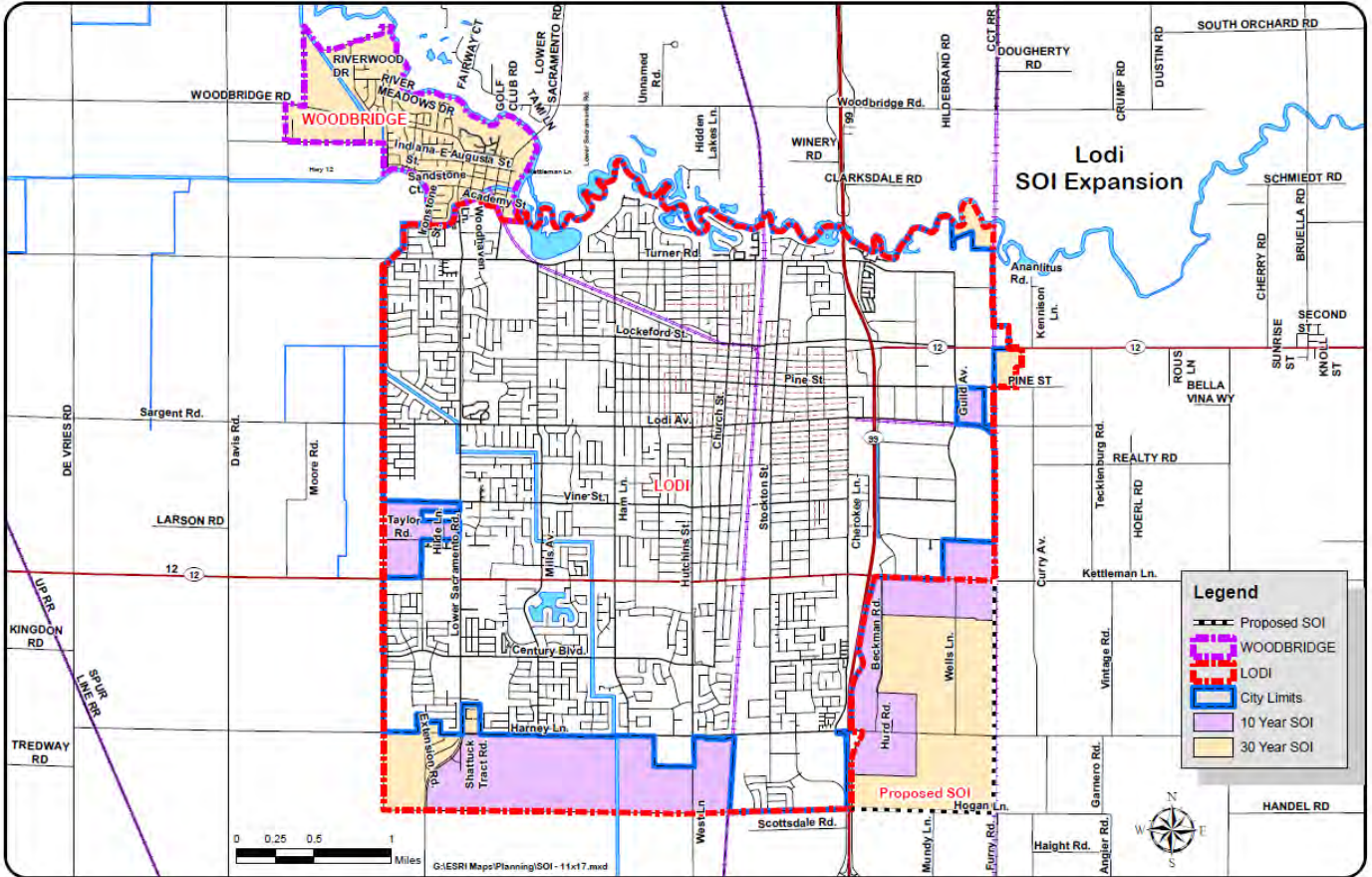


Table 1-1 presents the acreages of each planned land use, based on General Plan land use designations, within the existing City limits, and within the existing SOI and proposed SOI.

**Table 1-1: Land Use Acreages**

Overall Acreage Calculations					
		City Limits	Existing SOI	Proposed SOI	Total Acres
LDR	Low Density Residential	2911.5	893.1		3804.6
MDR	Medium Density Residential	470.5	166.6		637.0
HDR	High Density Residential	208.5	13.1		221.5
C	Commercial	406.1	52.4	162.1	620.6
O	Office	92.6	18.9		111.5
I	Industrial	1183.2	104.4	242.1	1529.7
BP	Business Park			396.0	396.0
OS	Open Space	310.8	164.5	51.2	526.6
PQP	Public/Quasi-Public	6.7	38.4		45.2
DMU	Downtown Mixed Use	89.3			89.3
MC	Mixed Use Corridor	466.7	34.0		500.7
W	Water	67.0			67.0
	Total Acres	6212.9	1485.4	851.4	8549.6
Source: City of Lodi, Engineering Department, GIS Division					

Figure 1-3: Williamson Act Lands in the Planning Area

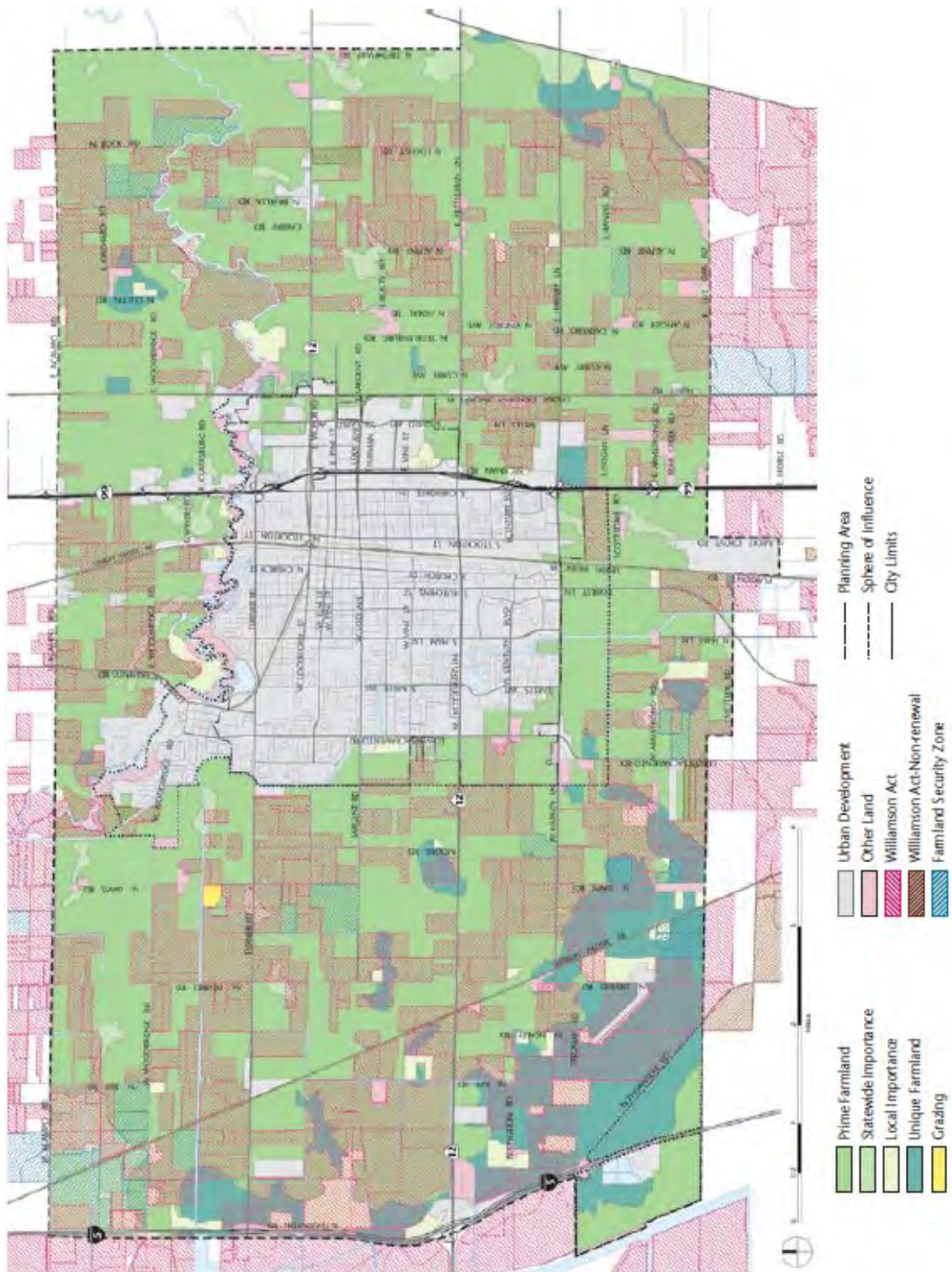
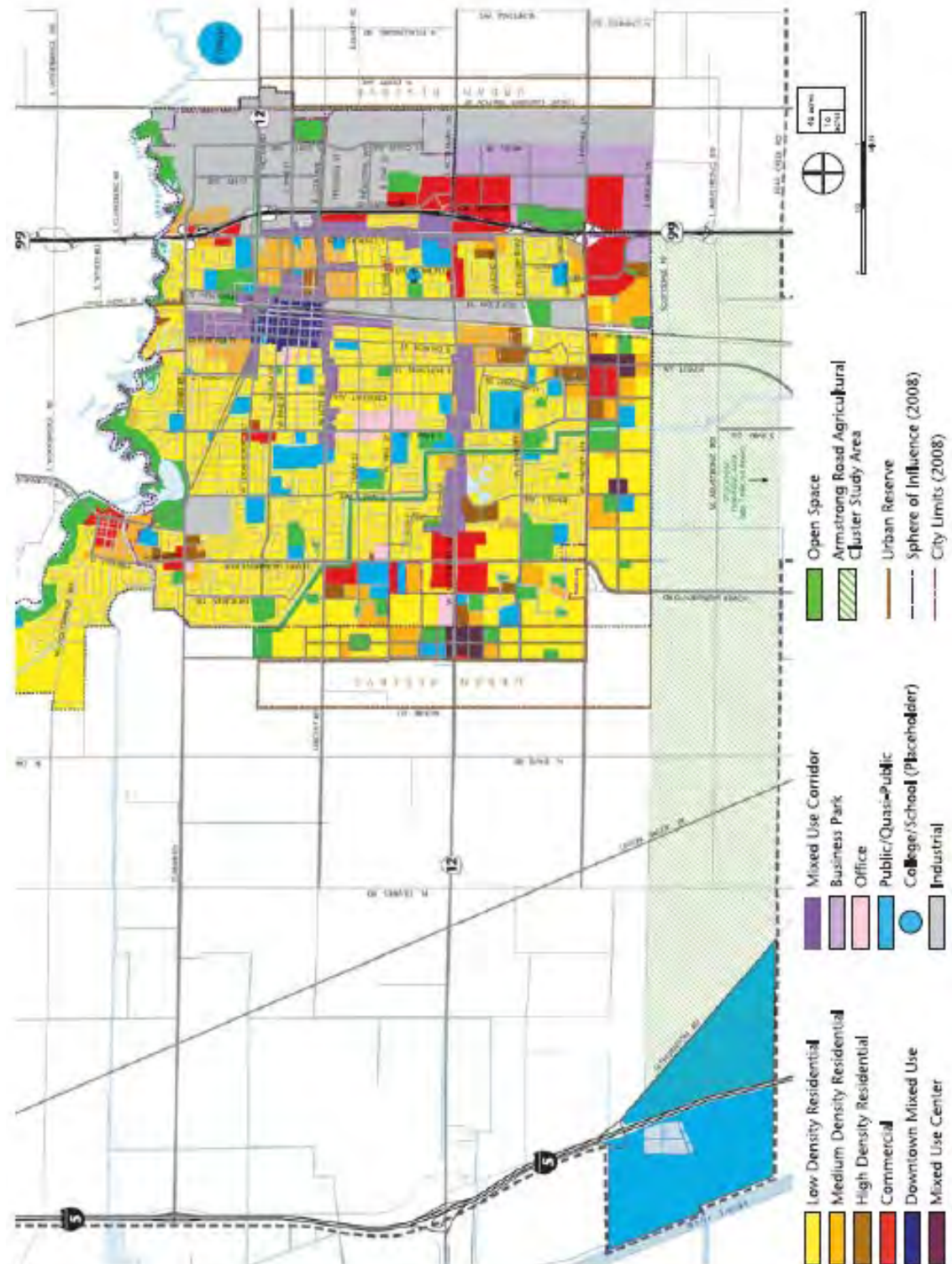




Figure 1-4 illustrates the City of Lodi General Plan Land Use Map for the entire Planning Area, including the City and SOI boundaries.

**Figure 1-4: General Plan Land Use Map**



This 2022 MSR and SOI plan will modify the existing SOI to include an area in the south-east quadrant of the 2010 Lodi General Plan (see Figure 1-2) for economic and jobs growth which is designated Commercial, Business Park and Industrial in the 2010 Lodi General Plan.

The Cortese-Knox-Hertzberg Act requires LAFCO to make nine written determinations. Following the SOI plan in Chapter 2, this MSR dedicates a chapter to each of these determinations in the order listed below.

- ◆ Infrastructure Needs and Deficiencies
- ◆ Growth and Population Projections for the Affected Area
- ◆ Financing Constraints and Opportunities
- ◆ Cost Avoidance Opportunities
- ◆ Opportunities for Rate Restructuring
- ◆ Opportunities for Shared Facilities and Determinations of Disadvantaged Unincorporated Communities
- ◆ Government Structure Options
- ◆ Evaluation of Management Efficiencies
- ◆ Local Accountability and Governance

### ***C. LAFCo and the Sphere of Influence***

Government Code Section 56076 defines a SOI as a “plan for the probable physical boundaries and service area of a local agency, as determined by the Commission.” An SOI is an area within which a city or district may expand through the annexation process. In simple terms, an SOI is a planning boundary within which a city or district is expected to grow over time.

In determining a sphere of influence, the Commission is required to consider and make written determinations with respect to the following factors (Government Code Section 56425):

1. The present and planned land uses in the area, including agricultural and open space lands.
2. The present and probable need for public facilities and services in the area.
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.
4. The existence of any social or economic communities of interest in the area if the Commission determines that they are relevant to the agency.

5. For an update of a sphere of influence of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, which occurs pursuant to subdivision (g) on or after July 1, 2012, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

The purpose of a SOI is to encourage “logical and orderly development and coordination of local governmental agencies so as to advantageously provide for the present and future needs of the county and its communities.” SOI serves a similar function in LAFCo determinations as general plans do for cities and counties.

In order to prepare or update a SOI, a MSR must be conducted which addresses the nine factors previously outlined. LAFCo must conduct the MSR and adopt written determinations with respect to those nine factors either prior to, or in conjunction with, any action to establish or update a SOI. Adopted LAFCo policies emphasize the use of existing plans, data and information currently available for the preparation of MSR documents rather than requiring preparation of new service documents.

#### ***D. California Environmental Quality Act***

The LAFCO procedures for CEQA compliance are authorized by Section 21083 of the California Public Resources Code which requires that the Secretary of the Resources Agency to adopt guidelines for the implementation of the California Environmental Quality Act of 1970 (CEQA) by public agencies. The guidelines which have been adopted, are set forth in the California Code of Regulations (Chapter 3, Title 14 Sections 15000, *et. seq.*) Section 15022 of the guidelines requires that each public agency adopt objectives, criteria, and specific procedures for administering its responsibilities under CEQA. The purpose of these regulations is to comply with the requirements of Section 15022. This MSR has been completed in full compliance with CEQA and LAFCO procedures.

Because this MSR is an informational document used for future actions that LAFCo or the City have not approved, adopted or funded, it is considered to be statutorily exempt from the California Environmental Quality Act (CEQA) pursuant to Section 15262 of the CEQA Guidelines. A notice of exemption pursuant to CEQA will be prepared by LAFCo.

The Lodi City Council certified the Environmental Impact Report (EIR), State Clearinghouse No. 20009022075, for the City of Lodi 2010 General Plan on April 7, 2010. The EIR was certified by Resolution No. 2010-41. Because the boundaries of the SOI and the General Plan boundary are the same, LAFCo may approve this MSR update as an addendum to the General Plan EIR.

## 2 SPHERE OF INFLUENCE PLAN

The Sphere of Influence (SOI) Plan for the City of Lodi described in this chapter analyzes the City's ability to serve existing and future residents within the proposed SOI. LAFCo is responsible for the sufficiency of the documentation and the Plan's consistency with State law and LAFCo policy.

This SOI plan has been completed in compliance with all applicable LAFCo policies as prescribed by the state legislature to:

1. Promote orderly growth and urban development.
2. Promote cooperative planning efforts among cities, the county and special districts to address concerns regarding land use and development standards, premature conversion of agriculture and open space lands, efficient provision of services, and discouragement of urban sprawl.
3. Serve as a master plan for future local government reorganization by providing long range guidelines for efficient provision of public services.
4. Guide consideration of proposals and studies for changes of organization or reorganization.
5. For cities and special districts that provide public facilities or services related to sewers, municipal and industrial water, or structural fire protection, the present and probable need for those public facilities and services within any disadvantaged unincorporated communities (DUCs) within the sphere of influence.

According to Government Code 56425 of the Cortese-Knox-Hertzberg Act, LAFCo must consider and prepare determinations for the following five factors.

1. The present and planned land uses in the area, including agricultural open space lands.
2. The present and probable need for public facilities and services in the area.
3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.
4. The existence of any social or economic communities of interest in the area if the Commission determines that they are relevant to the agency.
5. For an update of a sphere of influence of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, that occurs pursuant to subdivision (g) on or after July 1, 2012, the present and prob-

able need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.

LAFCo guidelines for determining SOI requires that “sphere horizons,” or planning increments, depict a city’s logical boundaries at time periods of between five and ten years, and up to thirty years. SOI areas must be consistent with general plan land use elements, and with the municipal services review (MSR). LAFCo also encourages general plan policies for implementing ordinances and programs that address smart growth principles, infill and redevelopment strategies, mixed use and increased densities, community buffers, and conservation of habitat, open space, and agricultural land.

LAFCo has established procedural guidelines for determining SOIs, including a Timeframe guideline which states “Territory that is currently receiving services from a local agency, or territory that is projected to need a local agency’s services within a 0–30-year timeframe may be considered for inclusion within an agency sphere. “Sphere horizons” or planning increments should depict the agency’s logical boundary at a time period of between 5 and 10 years and at the end of the 30-year time period.”

Detailed determinations as to the City’s ability to provide adequate services to existing and future residents within the existing SOI are contained in the subsequent chapters of this MSR.

#### ***A. Sphere of Influence***

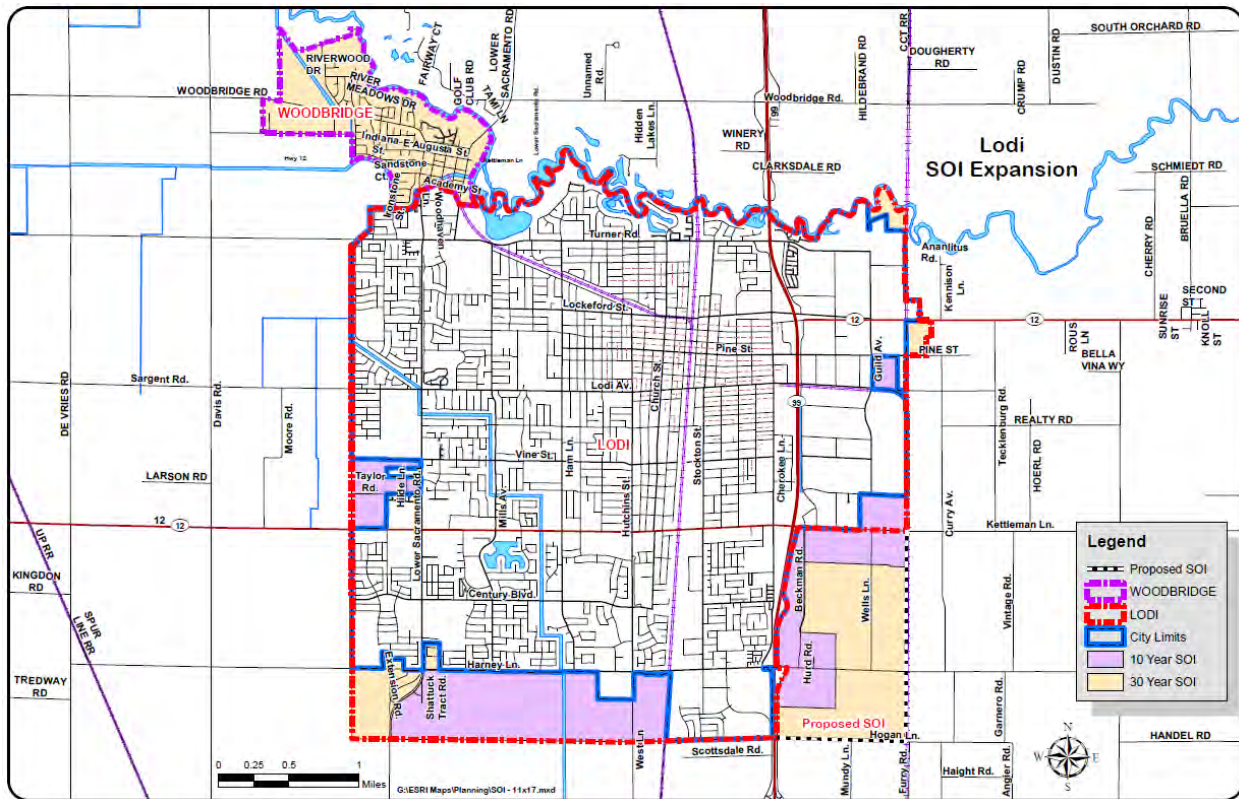
Development potential is calculated based on assumptions of new commercial and residential development that could be built under the General Plan land use designation and densities/intensities. These assumptions enable calculation of projected population and employment and allow the City to plan for growth and infrastructure accordingly. Development potential is reported by SOI as shown in Figure 2-1 below.

- 10 Year SOI represents a reasonable level of development given current market conditions and recent trends. This SOI includes approved and under construction development projects; infill development and redevelopment downtown, along the City’s major corridors, and in the eastern industrial areas; new growth areas just south of Harney Lane and around the Kettleman and Harney Lane interchanges of SR-99. The boundaries of the 10-year horizon include areas in the south-east quadrant which is generally bound by East Kettleman Lane to the north, East Hogan Lane to the south, Curry Avenue to the east, and Golden State (Hwy 99) to the west.
- 30 Year SOI represents the next most contiguous areas that will be made available once the land area depicted in the 10 Year SOI has been largely built out. The 20 Year SOI includes the areas just west of the western city limits and in the southeastern portion of the city, between SR-99 and the Central California Traction (CCT) Railroad line. The boundaries of the 30 Year SOI include the areas in the south-east quadrant which is generally bound by East



Kettleman Lane to the north, East Hogan Lane to the south, CCTTR to the east, and Golden State (Hwy 99) to the west.

**Figure 2-1: Sphere of Influence**



### **1. Unincorporated Areas of the SOI**

Dwelling unit estimates for unincorporated areas of the SOI are based upon Chapter 2 of the Lodi 2010 General Plan land use plan. General Plan development potential identifies the Unincorporated SOI as containing approximately 4,000 dwelling units along with approximately 3,816 units within the existing City limits and with approved projects. The Department of Finance estimates 2015 demographics to include 23,830 dwelling units for the City. The current buildout of the City and SOI boundary would include 7,816 dwelling units. The existing City Limits and Unincorporated SOI would ultimately contain approximately 31,646 housing units.

### **B. Sphere Analysis**

The following section describes the City of Lodi's projected development for 10-Year and 30-Year Horizons.

#### **1. Existing and Projected Population**

The population projections shown in Table 2-1 are based on a 1.5 percent growth rate, and an estimated 2019 population of 68,595. This growth rate represents a middle ground between Lodi's historical growth rate of 1 percent and the maximum growth rate of 2 percent allowed by the General Plan. The assumed annual growth rate is 1.5 percent.

**Table 2-1 Population Projections**

2019	67,581	68,595
2020	68,595	69,624
21	69,624	70,668
<b>2022</b>	<b>70,668</b>	<b>71,728</b>
23	71,728	72,804
24	72,804	73,896
25	73,896	75,004
26	75,004	76,129
27	76,129	77,271
28	77,271	78,431
29	78,431	79,607
2030	79,607	80,801
31	80,801	82,013
<b>32</b>	<b>82,013</b>	<b>83,243</b>
33	83,243	84,492
34	84,492	85,759
35	85,759	87,046
36	87,046	88,351
37	88,351	89,677
38	89,677	91,022
39	91,022	92,387
2040	92,387	93,773
41	93,773	95,180
42	95,180	96,607
43	96,607	98,056
44	98,056	99,527
45	99,527	101,020
46	101,020	102,535
47	102,535	104,073
48	104,073	105,635
49	105,635	107,219
2050	107,219	108,827
51	108,827	110,460
<b>2052</b>	<b>110,460</b>	

The population projections from 2000 and 2010 are based upon census numbers. The population numbers from 2005 and 2015 come from the Department of Finance.

## **2. Sphere Capacity**

The existing City limits, shown in Figure 2-1, reflect the 2006 and 2007 annexations of Reynold's Ranch, Westside, and Southwest Gateway project areas. These annexations are expected to play a significant role in accommodating population growth in Lodi. Due to the down economy from 2007 to 2013, projects that were annexed in 2007 and 2007 did not begin construction until 2014. In 2015 housing units started being built within the Westside area.

The estimated capacity of Lodi's SOI is based upon the existing built units within the City, approved projects within the City and development potential in the SOI. City of Lodi development potential is identified in Chapter 2 of the City of Lodi 2010 General Plan and based upon updated demographic numbers from the California Department of Finance and what is currently built.

The Lodi 2010 General Plan uses 2.7 persons per household to generate population estimates from projected housing units. The 2022 numbers from the American Community Survey/US Census uses 2.85 persons per household. For the purpose of this MSR, the updated 2.85 number is used. This does create different population estimates for the City.

The estimated capacity of Lodi's SOI is shown in Table 2-2. Population capacity estimates in Table 2-2 are based on a 2.85 person/unit ratio, in accordance with the 2022 American Community Survey/US Census demographic estimates of household size. The total sphere capacity is estimated based upon the existing housing units in the City, approved plans within the City limits and the unincorporated SOI. Based upon land use projections in Chapter 2 of the General Plan, it is anticipated that there are 7,816 potential undeveloped housing units in the SOI, accommodating a population of 22,275. Capacity estimates for recently annexed areas and unincorporated areas of the SOI are described below.

## **3. 2006, 2007, and 2022 Annexed Areas**

Dwelling unit estimates for the Reynold's Ranch, Westside and Southwest Gateway projects are derived from development plans and environmental impact reports. Development of these project areas will include approximately 3,084 dwelling units, accommodating an estimated population of 8,789. The table below provides the current population and population projections for the 10-year and 30-year horizons. The previously annexed properties and underutilized vacant properties within the City Limits expects a development potential of 3,816 housing units. Previously annexed areas are described in further detail below.

**Table 2-2 Estimated Sphere Capacity**

Current:	70,668
10 year (2032):	83,243
30 year (2052):	110,460

◆ **Reynolds Ranch.** The Reynolds Ranch/Blue Shield project area consists of approximately 220 acres, bounded by Harney Lane to the north, Highway 99 to the east, and the Union Pacific Railroad to the west. The project area's southern boundary runs approximately 650 feet north of Scottsdale Road. The entire property was annexed by the City of Lodi on December 8, 2006, and the City's current General Plan has been amended to reflect the resulting change in city boundaries. The proposed development of Reynolds Ranch includes 1,084 residential units on 97-acres, 20-acres for office development, and 40-acres for retail development and was planned to take place in two phases. The first phase includes the office development and 150 units and was originally expected to reach build out by 2008. The second phase includes all of the remaining development for the project, and for the purposes of this analysis was expected to be reached no later than 2015, but because of the down economy, residential development did not begin in Reynolds Ranch until 2016. Assuming 2.85 Person/Unit, this project area will accommodate 3,089 people at build out.

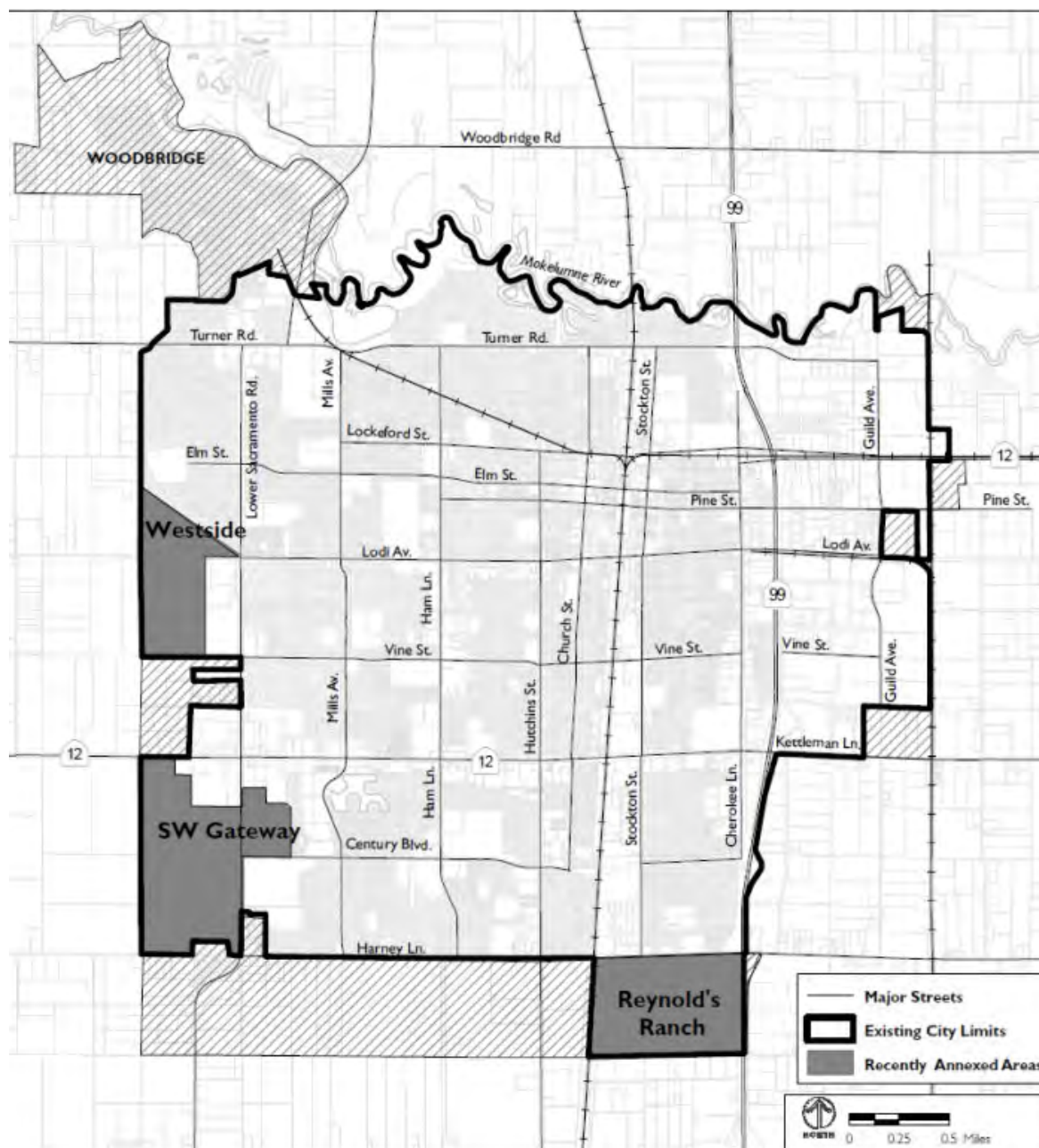
◆ **Westside.** The Westside project area was annexed by the City on July 26, 2007. The project area consists of 151 acres located along the City of Lodi western edge. The project area is bounded by the Woodbridge Irrigation District Canal to the north, agricultural land to the west and south, and existing City development to the east of Lower Sacramento Road. The proposed project includes 719 residential units, a 10.6-acre school site, and approximately 20 acres of parks and park basins. Assuming 2.85 person/unit, this project area will accommodate 2,049 people at build out.

The Westside project is expected to be completed in three phases, with completion anticipated by 2020. The timing of these phases will depend upon infrastructure design and residential demand. The first phase will include infrastructure development for sewer and water connections, street improvements, and development of 230 low- and medium-density units. The school site will be available for development by Lodi Unified School District during a second phase. During the second phase, high-density townhomes and approximately 100 additional medium- and low-density units will be developed. Remaining development will be completed during the third phase.

◆ **Southwest Gateway.** The Southwest Gateway (SW Gateway) project was annexed by the City on July 16, 2007. The SW Gateway project area consists of 257 acres, and planned development of up to 1,281 units, a school site, a fire station, and parks and park basins. Located south of the Westside project area, the SW Gateway project area is generally bounded by Highway 12 to the north, Van Ruiten Vineyard to the west, Harney Lane to the south, and Lower Sacramento Road to the east. The project is expected to reach completion by 2025, at which time it will accommodate a population of 3,650.

The SW Gateway project is expected to be completed in four phases. Similar to the development of the Westside project, actual timing will depend upon infrastructure design and market demand. The initial phase of development would establish and enhance critical infrastructure, develop 120 high-density townhome units, 104 medium-density units, and approximately 300 low-density residential units. This phase would also include coordination with LUSD regarding development of the school site. During the second phase, medium- and low-density lots would be constructed to complete development between Century Boulevard and Kettleman Lane, and 240 high-density apartments would be developed. The third phase would include development of medium- and low-density lots, a park/basin, and critical roadway connection. The final phase would complete remaining development of medium- and low-density lots and necessary infrastructure.

**Figure 2-2: Annexed Area**



#### **4. Phases I, II, and III**

The City of Lodi General Plan Growth Management Element (GM Element) provides guidance for the orderly development of the community. The GM Element describes development in

three Phases. Phase 1 of the GM ordinance generally corresponds with 10-year growth projections and Phases 2 and 3 of the GM Element generally describe 30-year build out.

Development Residential land: Phase I of the General Plan accommodates approximately 4,400 new housing units, as shown in Table 2-3. The boundaries of Phase I are the same as the 10 Year SOI boundaries in Figure 2-1. Low-density housing (primarily single-family detached units) continues to be the most prevalent housing type under the General Plan, comprising nearly half of all housing units. Medium-density housing constitutes 27% of all housing; mixed-use developments represent 20%; and high-density units represent 7%.

An additional 5,700 units could be developed in Phases II, the boundaries of Phase II are the same as the 30 Year SOI boundaries in Figure 2-1. Phase II would include a similar mix of residential densities, while Phase III is excluded from the 10 Year and 30 Year SOI and will not include any new development. In sum, existing housing units, approved development projects, and net new units could result in 37,200 housing units.

**Table 2-3: Potential Housing Units**

PHASE	HOUSING UNITS
Phase 1	4,400
Low-Density	2,000
Medium-Density	1,200
High-Density	300
Mixed Use Residential	900
Phase 2	1,900
Phase 3 (Urban Reserve)	3,800
Approved Projects	3,711
Existing (2008)	23,353
<b>Total General Plan</b>	<b>37,200</b>
Total does not sum exactly due to rounding.	

Non-residential land: Table 2-4 summarizes the overall acreage calculations by land use, within the city limits, existing SOI, and proposed SOI. Industrial and commercial represent the largest non-residential land uses, with proposed development concentrated on the eastern portion of the city. Across all three phases, the plan accommodates 1529.7-acres of industrial development, 111.5-acres of office development, and 620.6-acres of commercial development (primari-

ly General Commercial with some Neighborhood Commercial in Mixed-Use Centers). In addition, approximately 350 hotel rooms are included on the General Commercial square footage area.

Open space total 526.6-acres, resulting in a combined ratio of 4.8-acres of open space per 1,000 residents at the 30-year horizon (year 2052).

**Table 2-4: Land Uses (acres)**

Overall Acreage Calculations					
		City Limits	Existing SOI	Proposed SOI	Total Acres
LDR	Low Density Residential	2911.5	893.1		3804.6
MDR	Medium Density Residential	470.5	166.6		637.0
HDR	High Density Residential	208.5	13.1		221.5
C	Commercial	406.1	52.4	162.1	620.6
O	Office	92.6	18.9		111.5
I	Industrial	1183.2	104.4	242.1	1529.7
BP	Business Park			396.0	396.0
OS	Open Space	310.8	164.5	51.2	526.6
PQP	Public/Quasi-Public	6.7	38.4		45.2
DMU	Downtown Mixed Use	89.3			89.3
MC	Mixed Use Corridor	466.7	34.0		500.7
W	Water	67.0			67.0
	Total Acres	6212.9	1485.4	851.4	8549.6

Source: City of Lodi, Engineering Department, GIS Division

Projected growth represents an annual growth rate of 1.5%, consistent with the American Community Survey/US Census.

Accounting for the current population, new residents anticipated from recently approved projects, and potential future residents, reasonable development of all of the phases in the General Plan could result in 110,460 residents at the 30-year horizon (year 2052). These projections will allow the City to plan for growth and infrastructure accordingly.



**Table 2-5: Housing Units per Phase**

PHASE	HOUSING UNITS BY PHASE	CUMULATIVE HOUSING UNITS	POPULATION BY PHASE	CUMULATIVE POPULATION	JOBS BY PHASE	CUMULATIVE JOBS
Existing (2008)	23,353	23,353	63,400	63,400	24,700	24,700
Approved Projects	3,711	27,100	9,700	73,100	2,900	27,600
Phase 1	4,400	31,500	11,400	84,500	11,600	39,200
Phase 2	1,900	33,400	5,000	89,500	8,600	47,800
Phase 3	3,800	37,200	10,000	99,500	3,200	51,000
<b>Total General Plan</b>	<b>37,200</b>		<b>99,600</b>		<b>61,000</b>	

#### Within the 10-Year Planning Horizon

The boundaries of the 10-year horizon will be expanded to include the Phase I areas in the south-east quadrant which is generally bound by East Kettleman Lane to the north, East Hogan Lane to the south, CCTTR to the east, and Golden State (Hwy 99) to the west. The potential build-out of the 10-year horizon is summarized in Table 2-5.

#### Within the 30-Year Planning Horizon

The boundaries of the 30-year horizon will be expanded to include the Phase II areas in the south-east quadrant which is generally bound by East Kettleman Lane to the north, East Hogan Lane to the south, CCTTR to the east, and Golden State (Hwy 99) to the west.

### ***C. Development Projections***

Lodi's economic base has historically been concentrated on agriculture and manufacturing. Agriculture and manufacturing businesses have been attracted by the city's access to transportation routes and facilities as well as a location that is central to the markets of the western United States. Today, tourism is a growing sector of the basic economy as well: visitors are attracted primarily by Lodi's premium wine industry.

The 2010 General Plan seeks to provide balanced land uses that generate adequate revenue to pay for the cost of services provided. A combination of office, retail, and visitor's services and attractions, provide a range of jobs for local workers and revenue streams for the City government. The new growth areas provide land for potential large employment opportunities, similar to the Blue Shield call center for industrial users. Highway adjacent commercial designations may attract commercial users who favor highway accessibility.

The City has designated the area east of Highway 99 as an area for economic growth. The City looks to further develop commercial, industrial and business park uses. This economic growth

area will not affect the SOI residential capacity. This area does not include any residential uses and will not generate population growth directly.

Figure 2-2 shows the existing City limits, including recently annexed areas. Build out of these project areas is expected to be reached by 2025, providing for a new total population of 75,004 residents. As these project areas are expected to accommodate population growth through 2025, the existing City limits and SOI are not proposed to be modified to accommodate more residential growth, however the City does propose a sphere modification to accommodate economic growth opportunities for the City.

Figure 2-1 shows the Lodi 2010 General Plan land use map. This MSR / SOI plan is intended to expand the SOI boundary into the southeast area of the General Plan map.

Figure 2-1 depicts the areas of the City's 10-year sphere and 30-year horizons. The boundaries of the 10-year horizon will be expanded to include the Phase I areas in the south-east quadrant which is generally bound by East Kettleman Lane to the north, East Hogan Lane to the south, CCTTR to the east, and Golden State (Hwy 99) to the west. The boundaries of the 30-year horizon will be expanded to include the Phase II areas in the south-east quadrant.

Population: Phase I of the General Plan could add 11,400 new residents to Lodi. An additional 5,000 and 10,000 residents could be expected if Phase II and Phase III were developed, respectively. Accounting for the current population as well as new residents anticipated from recently approved projects, the General Plan could result in 110,460 residents, representing an annual growth rate of 1.5% (see Table 2-6).

Table 2-6: Population by Phase

<b>Population Growth Projections</b>	
Assumed annual growth rate: 1.5%	
Current:	70,668
10 year (2032):	83,243
30 year (2052):	110,460

The City's total population is expected to increase by 12,575, reaching a population of 83,243 by 2032. By comparison, the City population is projected to reach 110,460 by 2052. Therefore, it is expected that the 30 Year SOI will provide for projected population growth through 2052.

#### ***D. Determinations***

This section includes the five determinations required by State law for SOI's. This sphere plan proposes to change the existing SOI to include the 10-year horizon boundaries which will be expanded to include the Phase I areas in the south-east quadrant which is generally bound by East Kettleman Lane to the north, East Hogan Lane to the south, CCTTR to the east, and Golden State (Hwy 99) to the west, and the boundaries of the 30-year horizon which will be expanded to include the Phase II areas in the south-east quadrant. The proposed SOI expansion areas are identified within the General Plan as Commercial, Business Park, Industrial, and Open Space land uses – +/- 851.4-acres. This area does not include any residential uses and will not generate population growth directly, as this is an economic growth area for the City.

Written determinations are included for each of the required areas and are provided below. The San Joaquin LAFCo "Service Review Policies" document dated December 14, 2012, prepared by the San Joaquin LAFCo was used as a guide in the preparation of this MSR. The following determinations are based on a comprehensive review of services contained in this MSR. These determinations affirm the City's ability to provide services to existing and future populations within its SOI in accordance with Government Code section 56425:

**Determination 1:** The present and planned land uses in the area, including agricultural open space lands.

Present and planned land uses are appropriate for serving existing and future residents of Lodi. The City of Lodi 2010 General Plan includes goals, policies, and implementing programs that address growth, development, and conservation of open space. Planned land uses in the Lodi 2010 General Plan include Low Density Residential, Medium Density Residential, High Density Residential, Commercial, Business Park, Office, Downtown Mixed-Use, Mixed-Use Center, Mixed Use Corridor, Industrial, Open Space, Public/Quasi-Public, and Urban Reserve. Land designations applicable to the 10 and 30-year horizons are identified within the General Plan as Commercial, Business Park, Industrial, and Open Space land uses – +/- 851.4-acres. This area does not include any residential uses and will not generate population growth directly, as this is an economic growth area for the City. (see Table 2-7).

**Determination 2:** The present and probable need for public facilities and services in the area.

The City of Lodi provides adequate services to meet the needs of the existing population. Services provided by the City include fire, police, water, wastewater, stormwater drainage, and electrical utility. The City also provides public facilities including transportation, libraries, and recreational facilities. New development within the SOI will lead to population growth and the need for additional service provision.

The City created an additional source of revenue to fund the provision of public services such as police, fire, parks, and public works by forming a Citywide Services Community Facilities District (“Services CFD”) pursuant to the California Mello-Roos Act. The Services CFD is another tool for securing a revenue source to fund the expansion of services as the City grows and continues to develop. CFD 2007-1 was formed on May 15, 2007, and the services provided includes police, fire prevention, parks and recreation, flood and storm protection, environmental and hazardous substance cleanup and administration. A new CFD, to replace CFD 2007-1, will be formed as part of the current annexation process, and the annexation will be conditioned on the formation of the new CFD to cover the same services with an updated rate to reflect full cost recovery for the services. The new CFD would become effective prior to any annexation. NBS Financial Services, Inc. (NBS) will be working to form the new CFD on the City's behalf.

The expanded tax base and fees that result from new development, as well as establishment of Community Facilities Districts where appropriate, will provide funding for these services. Development and connection fees will address the capital costs and user charges will address the infrastructure and operating expenses of new development.

New development within the SOI will lead to population growth and the need for additional service provision. The expanded tax base and fees that result from new development, as well as establishment of Community Facilities Districts where appropriate, will provide funding for these services. Development and connection fees will address the capital costs and user charges will address the infrastructure and operating expenses of new development. General Plan policies are in place to ensure adequate service provision for current and future populations and require the City to address any gaps in funding that present themselves in the future.

Existing public facilities and services are adequate for serving the needs of Lodi's population. Lodi's fire department has adequate staff and facilities to provide for existing populations and is in the process of developing new facilities to better serve growing populations. Lodi's police department has adequate staff and facilities. The City's water supply, wastewater and storm drainage services meet the needs of current population and are currently being updated and expanded to meet the needs of future populations. The determinations included in Chapter 3 of this MSR show that public facilities and services are adequate to meet needs of current population and are being improved so as to meet needs of future populations.

**Determination 3:** The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.

The determinations included in Chapter 3 this MSR show that public facilities and services are adequate to meet the needs of the current population. In addition, public facilities and services are being improved over time, and specific timeframes and policies have been established to meet the projected demand from the City's future growth.

**Determination 4:** The existence of any social or economic communities of interest in the area if the Commission determines that they are relevant to the agency.

The existing SOI includes the community of Woodbridge, which is a social and economic community of interest for the City of Lodi, and Flag City, an unincorporated commercial center at the junction of I-5 and SR-12. The City of Lodi does not propose any change to its existing SOI in that area and is not looking to annex any lands in that area. Therefore, adjacent communities will not be impacted at this time.

**Determination 5:** For an update of a sphere of influence of a city or special district that provides public facilities or services related to sewers, municipal and industrial water, or structural fire protection, that occurs pursuant to subdivision (g) on or after July 1, 2012, the present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence must be analyzed.

SB 244 (Chapter 513, Statutes of 2011) made changes to the Cortese-Knox-Hertzberg Local Government Reorganization Act related to “disadvantaged unincorporated communities.” Disadvantaged unincorporated communities are inhabited territories (containing 12 or more registered voters) where the annual median household income is less than 80 percent of the statewide annual median household income.

Cortese-Knox-Hertzberg Local Government Reorganization Act Section 56375(a)(8)(A) prohibits LAFCo from approving a city annexation of more than 10 acres if a disadvantaged unincorporated community is contiguous to the annexation territory but not included in the proposal, unless an application to annex the disadvantaged unincorporated communities has been filed with LAFCo, or if the Commission finds that a majority of the registered voters are opposed to annexation. The legislative intent is to prohibit “cherry picking” by cities of tax-generating land uses while leaving out under-served, inhabited areas with infrastructure deficiencies and lack of access to reliable potable water and wastewater services. Disadvantaged unincorporated communities are recognized as social and economic communities of interest for purposes of recommending SOI determinations pursuant to Section 56425(c).

There are no identified Disadvantaged Unincorporated Communities within the Lodi SOI. The Disadvantaged Communities Mapping tool maintained by the California Department of Water Resources (<https://gis.water.ca.gov/app/dacs/>) was reviewed and did not show any disadvantaged communities within the proposed SOI, however the mapping tool did identify one pocket that qualifies as a Disadvantaged Communities under the SB 244 definition. The Harney Lane pocket includes approximately 23 homes located on approximately 22.3 acres. However, there are no Disadvantaged Unincorporated Communities located within the Lodi SOI, therefore no further discussion of this determination is provided within this MSR.

### **3 INFRASTRUCTURE NEEDS AND DEFICIENCIES**

The purpose of this section is to evaluate infrastructure needs and deficiencies for services provided by the City of Lodi as they relate to current and future users. Infrastructure needs and deficiencies will be evaluated in terms of supply, capacity, condition of facilities, and service quality with correlations to operational, capital improvement, and finance plans.

This section of the MSR will address the provision of public services within the existing City boundaries which include the annexed Reynold's Ranch project area and within the recently approved annexation areas of the Westside and SW Gateway project areas, and the provision of public services within the 10-year and 30-year horizon boundaries. The following services are provided by the City of Lodi, and will be evaluated in this section:

- ◆ Fire Protection and Emergency Medical Services
- ◆ Law Enforcement
- ◆ Water Supply and Treatment
- ◆ Wastewater Collection and Treatment
- ◆ Stormwater Drainage
- ◆ Electrical Utility
- ◆ Public Services (Libraries)

In order to approve a change in the SOI and annexation of land into the City of Lodi, LAFCO must determine that the necessary infrastructure and public services exist to support the new uses at comparable service levels. The information put forward in this MSR supports the City of Lodi's requested 10-year and 30-year horizons.

#### ***A. Fire Protection and Emergency Medical Services***

The Lodi Fire Department covers the city (12.69 square miles) from four fire stations: Fire Station 1 is located in the downtown area, Fire Station 2 is located on the eastside of Lodi, Fire Station 3 is located in the southwest section of town, and Station 4 is in the northwest section of town. A fifth station has been contemplated to serve development in the southern portion of the City but a specific location has not yet been identified. In addition, the City of Lodi Fire Department utilizes the State Master Mutual Aid System under CAL OES (Office of Emergency Services), which utilizes resources from municipal fire departments to provide fire protection throughout the State.

The Lodi Fire Department Fire Prevention Division is responsible for enforcing the California Fire Code under the direction of the Fire Marshal (Battalion Chief). The Fire Marshal evaluates, schedules, and records all residential, commercial, industrial, and educational inspections. In addition to building inspection the Fire Prevention Division issues fire operational permits and special use permits for events. **The City also has a mutual aid agreement with the Woodbridge Fire Protection District, Stockton Fire Department, and Cosumnes Fire District.**<sup>1</sup>

The Fire Department provides a wide range of emergency and non-emergency services, including hazardous materials response, public education, and related safety services. The Emergency Operations Center, located at the Police department building, serves as the center of the city's emergency operations. The Lodi Police department is the primary public safety access point (PSAP) for all 911 calls within the jurisdiction of Lodi. Fire and EMS calls for service are routed to the Stockton Regional Dispatch Center (SRDC). Lodi, Stockton, Manteca, Lathrop-Manteca, and South County Fire Authority are all dispatched from the SRDC. City operations remain in compliance with the National Incident Management System (NIMS), a comprehensive national approach to incident management, applicable to federal, state, and local governments and the Standardized Emergency Management System (SEMS), which provides a strategy and framework to address multi-agency and multijurisdictional emergencies in California.

The City of Lodi has adopted a resolution to abide by the California Disaster and Civil Defense Master Mutual Aid Agreement. As shown in Figure 3-1, the Lodi Fire Department is bordered by the Woodbridge, Mokelumne and Liberty Fire Protection districts. Lincoln and Waterloo-Morada Fire Protection Districts are also in proximity of the City. The Lincoln Fire District, however, is served by the City of Stockton Fire Department under a contract agreement. The Lodi Fire Department has established mutual aid agreements with the following fire districts in order to increase cost effectiveness and efficiency in responding to emergencies in San Joaquin County:

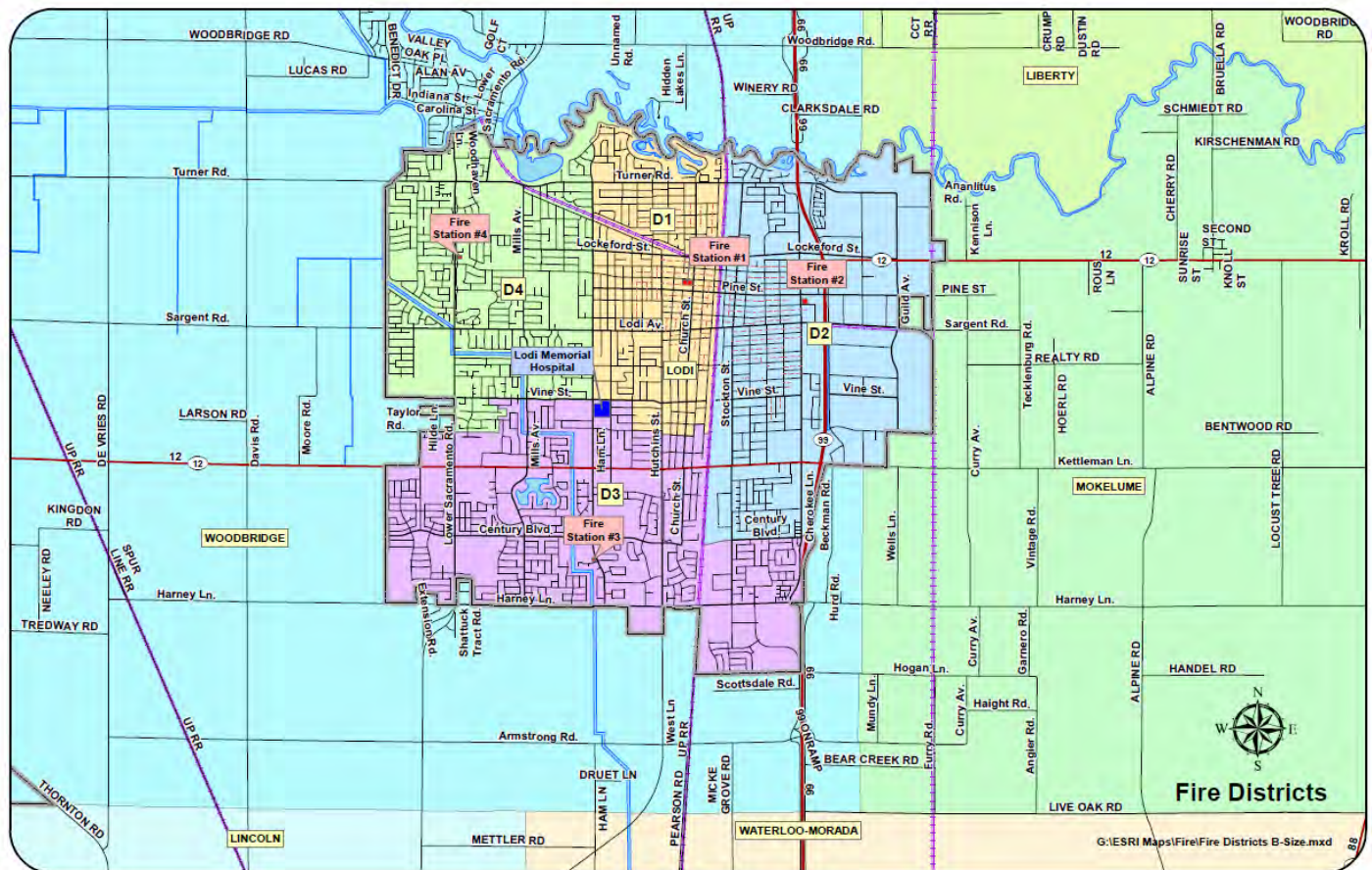
- ◆ Lathrop Manteca Fire District
- ◆ Woodbridge Rural Fire Protection District
- ◆ Ripon Consolidated District
- ◆ Mokelumne Fire Protection District
- ◆ Linden-Peters Rural County Fire Protection District
- ◆ Clements Rural Fire Protection District
- ◆ Escalon Consolidated Fire Protection District
- ◆ Waterloo-Morada Fire District
- ◆ Thornton Fire Protection District

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<sup>1</sup> Pacific Municipal Consultants, Lodi Shopping Center Draft Environmental Impact Report, prepared for the City of Lodi, August 2004.

- ◆ Stockton Fire Department
- ◆ Farmington Fire District
- ◆ French Camp McKinley Fire District
- ◆ Manteca Fire Department
- ◆ Montezuma Fire District
- ◆ South County Fire Authority

**Figure 3-1 County Fire Districts, Lodi Fire Stations, and Hospital**



### **1. Existing Facilities and Services**

Administrative offices of the Lodi Fire Department, including Fire Administration and Fire Prevention, are located at 210 W. Elm St. Fire Administration houses the Fire Chief, Deputy Chief of Operations, Fire Marshal, Chief of Training, and Department Administration Assistants. The Fire Prevention division includes the Fire Marshal, and Administrative Clerk. In addition to the administrative office, the fire department operates four fire stations which are distributed



throughout the City. All of the fire stations are located within City boundaries. Table 3-1 shows the location, equipment, and services provided at each location. Fire station locations are also shown in Figure 3-3.

**Table 3-1: Lodi Fire Stations and Equipment**

<b>Station</b>	<b>Location</b>	<b>Equipment</b>
1	210 W Elm Street	Battalion 2011, Truck 2051, Engine 2031, and a reserve engine.
2	2 S Cherokee Lane	Engine 2032, State of California Office of Emergency Services (OES) Engine 338, Hazmat 2081, USAR Trailer, Public Education Trailer, and the Santa Fire Truck
3	2141 S Ham Lane	Engine 2033 and a reserve engine
4	180 N Lower Sacra- mento Road	Engine 2034 and a reserve truck

Source: <http://www.lodi.gov/fire/> accessed 10/19/21.

The department is the City's second largest General Fund department with 56.6 positions and a FY 2021-22 operating budget of \$16,392,350. A summary of expenditures and staffing are shown below.

**Table 3-2: Lodi Fire Department Budgets**

Fire Department Expenditure Summary	2018/19 Actuals	2019/20 Actuals	2020/21 Budget	2020/21 Estimated Actuals	2021/22 City Council Adopted
71 - Salaries & Benefits	10,624,260	11,630,988	12,749,720	12,694,530	13,944,010
72 - Supplies & Services	1,013,862	1,033,598	989,260	1,014,260	1,272,940
74 - Insurances	122,085	262,320	267,900	267,900	320,400
77 - Operating Transfers	519,180	839,180	640,750	640,750	855,000
78 - Capital Projects	0	11,984	0	0	0
<b>Fire Department Total</b>	<b>12,279,386</b>	<b>13,778,069</b>	<b>14,647,630</b>	<b>14,617,440</b>	<b>16,392,350</b>

STAFFING SUMMARY	2018-19 Positions	2019-20 Positions	2020-21 Positions	2021-22 Positions
<b>FIRE DEPARTMENT</b>				
Administrative Assistant	1.0	1.0	1.0	1.0
Deputy Fire Chief	1.0	1.0	1.0	1.0
Fire Battalion Chief	4.0	4.0	4.0	4.0
Fire Captain	16.0	16.0	16.0	16.0
Fire Chief	1.0	1.0	1.0	1.0
Fire Engineer	19.0	19.0	19.0	19.0
Firefighter I/II	14.0	14.0	14.0	14.0
Management Analyst	0.6	0.6	0.6	0.6
<b>Fire Department Total</b>	<b>56.6</b>	<b>56.6</b>	<b>56.6</b>	<b>56.6</b>

The department received a total of 7,521 calls in 2021, averaging 28.4 calls per day.<sup>2</sup> The General Plan establishes a travel time goal of 3:00 minutes or less for emergency calls. Actual average response time in 2021 was 4.8 minutes, with drive time to the southwest and southeast corners of the City being 4.41 and 5.19 minutes respectively.

## **2. Provisions for Future Growth and Systems Improvement**

The Growth Management Element of the City's 2010 General Plan includes policies to ensure that adequate fire personnel related facilities are funded and provided to meet future growth. These policies include:

- GM-G4: Provide public facilities including police and fire services, schools, and libraries commensurate with the needs of the existing and future population.
- GM-P27: Maintain sufficient fire and police personnel and facilities to ensure maintenance of acceptable levels of service. Provide needed facilities concurrent with phased development.

<sup>2</sup> R. Penix, City of Lodi Fire Department, 5/13/22.

In order to achieve continued compliance with the National Fire Protection Association's response time criteria of 6 minutes for 90% of all calls, the Fire Department expand operations and construct new fire stations as appropriate to serve new development. Additional fire stations will be proposed to address the ultimate sphere boundaries. The expanded tax base that results from new development, as well as the continuation of the residential Community Facilities Districts, will provide funding for fire services. Development fees will address the capital cost of new fire facilities and equipment.

## ***B. Law Enforcement***

### **1. Existing Facilities and Services**

Police protection services in the City of Lodi are provided by the Lodi Police Department. The Department has operated out of the Lodi Police Facility at 215 West Elm Street since the facility's completion in February 2004. The facility includes 51,000 square feet for police and jail services, and 8,000 square feet for future use by the San Joaquin County Superior Court.<sup>3</sup>

The Lodi Police Department is divided into three districts, encompassing five geographical areas or "patrol beats," as shown in Figure 3-2. The Sunset District's geographical borders are generally east to Hutchins Street, north to city limits, west to the city limits, and south to city limits. The Heritage District's geographical borders are generally west to Hutchins Street, north to the city limits, east to the city limits and south to city limits but excluding the area of the Central District. The Central District's geographical borders are generally west to Hutchins Street, north to Elm Street, south to Vine Street and East to Cherokee lane.

The department is divided into 2 divisions. The Operations Division responds to the majority of calls for service and is made up of Patrol, Traffic, Parks, School Resource, Community Liaison, and Community Service Officers. The Chaplains, Partners, and Crime Prevention are also a part of the Operations Division. The Support Services Division is comprised of the Office of Professional Standards, Investigations, Dispatch/Jail, Animal Services, and Records. The General Investigations Unit is responsible for the majority of follow-up investigations which include homicide, assaults, robbery, and child abuse. The Special Investigations Unit focuses on drug, gang, and vice offenses.

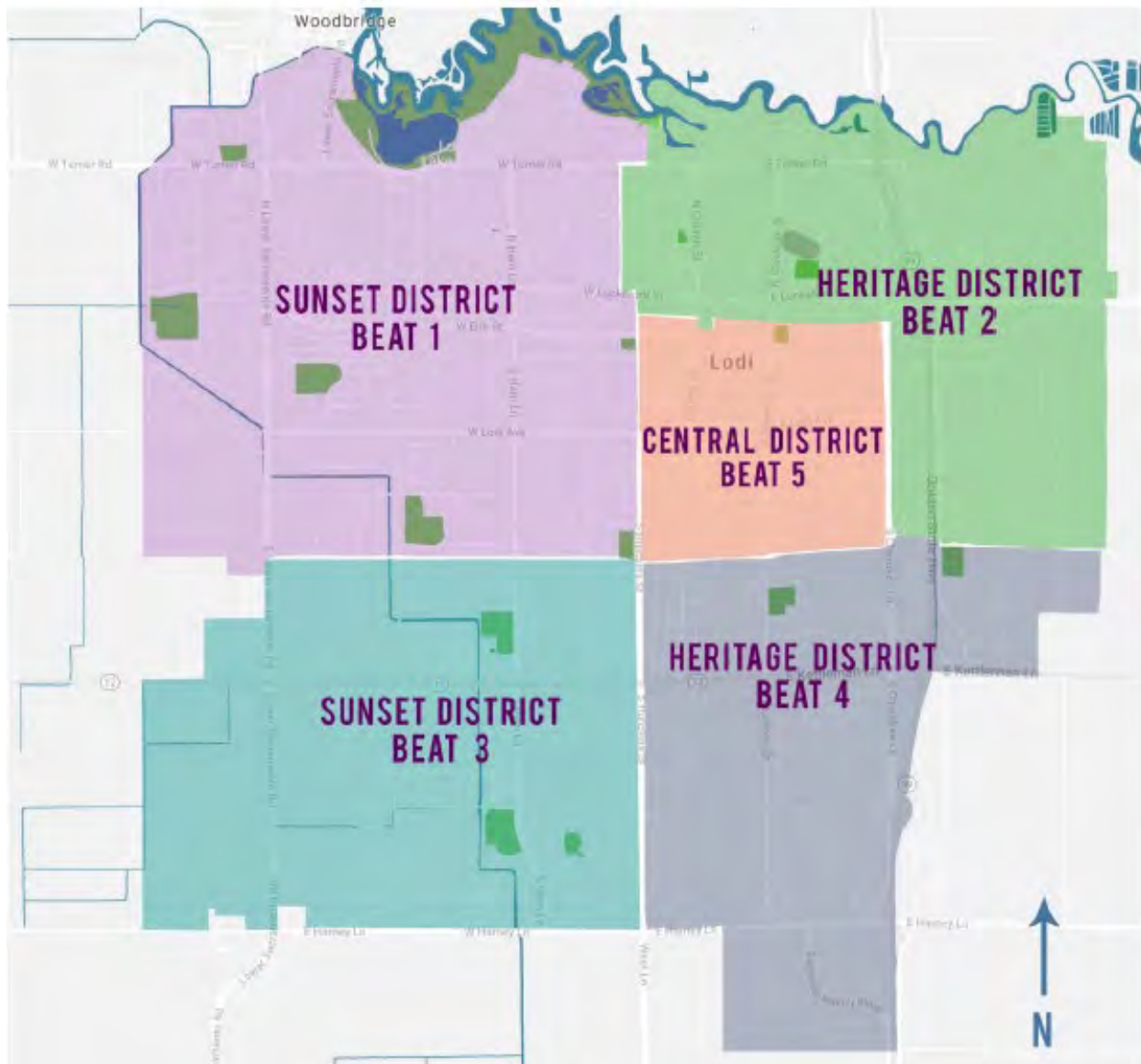
The Lodi Police Department defines offenses for statistical purposes using the Uniform Crime Reporting Code of California which classifies crimes as Part 1 or Part 2 based on their severity. Part 1 Crimes include homicide, rape, robbery, aggravated assault, burglary, larceny, auto theft,

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<sup>3</sup> City of Lodi Police Department, <http://www.lodi.gov/police/index.htm>, accessed on 10/19/21.

and arson, Part 2 Crimes affect property. In 2021, 1,923 Part 1 crimes were reported, and the following crime rates per 1,000 residents: violent 3.28; property 24.59; overall 27.87. It should be noted that overall crime rates per 1,000 residents have decreased 35 percent since 2011 which had the following crime rates: violent 3.7; property 39.2; overall 42.9.<sup>4</sup> The Lodi Police Department's ratio of officers to 1,000 population is 1.2.

**Figure 3-2: Lodi Police Department and Service Districts**



<sup>4</sup> Lodi Police Department 2021 Annual Report

The department is the City's largest General Fund department with 111 positions and a FY 2021-22 operating budget of \$27,157,950. A summary of expenditures and staffing are shown below.

**Table 3-3: Lodi Police Department Budgets**

	2018/19	2019/20	2020/21	2020/21	2021/22 City
Police Department Expenditure Summary	Actuals	Actuals	Budget	Estimated Actuals	Council Adopted
71 - Salaries & Benefits	17,376,484	19,994,567	21,791,530	21,277,750	22,968,530
72 - Supplies & Services	2,346,125	2,979,292	2,594,700	2,697,090	2,768,730
74 - Insurances	237,260	501,630	512,300	512,300	612,690
77 - Operating Transfer O	100,000	336,000	210,000	210,000	808,000
78 - Capital Projects	23,085	115,089	56,921	56,930	0
<b>Police Department Total</b>	<b>20,082,954</b>	<b>23,926,578</b>	<b>25,165,451</b>	<b>24,754,070</b>	<b>27,157,950</b>

	2018-19	2019-20	2020-21	2021-22
STAFFING SUMMARY	Positions	Positions	Positions	Positions
<b>POLICE DEPARTMENT</b>				
Administrative Assistant	1.0	1.0	1.0	1.0
Animal Services Supervisor	1.0	1.0	1.0	1.0
Assistant Animal Services Officer	2.0	2.0	2.0	2.0
Code Enforcement Officer	2.0	2.0	2.0	
Dispatcher Supervisor	1.0	1.0	1.0	1.0
Dispatcher/Jailer	13.0	13.0	13.0	13.0
Lead Dispatcher/Jailer	4.0	4.0	4.0	4.0
Management Analyst	1.0	1.0	1.0	1.0
Police Captain	2.0	2.0	2.0	2.0
Police Chief	1.0	1.0	1.0	1.0
Police Corporal	7.0	7.0	7.0	7.0
Police Lieutenant	5.0	5.0	5.0	5.0
Police Officer	53.0	53.0	53.0	53.0
Police Records Clerk	3.0	3.0	3.0	4.0
Police Records Clerk Supervisor	1.0	1.0	1.0	1.0
Police Sergeant	9.0	9.0	9.0	9.0
Property/Evidence Technician	1.0	1.0	1.0	1.0
Senior Administrative Clerk	1.0	1.0	1.0	1.0
Senior Police Administrative Clerk	1.0	1.0	1.0	1.0
<b>Police Department Total</b>	<b>109.0</b>	<b>109.0</b>	<b>109.0</b>	<b>108.0</b>

The General Plan policies below are required to prevent crime and to ensure the adequate provision of police services.

- GM-G4: Provide public facilities including police and fire services, schools, and libraries commensurate with the needs of the existing and future population.
- GM-P27: Maintain sufficient fire and police personnel and facilities to ensure maintenance of acceptable levels of service. Provide needed facilities concurrent with phased development.

- S-P7: Site critical emergency response facilities such as hospitals, fire stations, police offices, substations, emergency operations centers and other emergency service facilities and utilities to minimize exposure to flooding and other hazards.

Funding for these capital improvements is to be provided through development impact mitigation fees on all new residential, commercial, office and industrial developments.

The City of Lodi funds its law enforcement exclusively through the General Fund, a portion of these funds being generated by Measure L sales tax revenues. Forty percent of Lodi's General Funds are allocated to the Lodi Police Department for the 2022 budget cycle, providing a yearly budget of \$27,157,950.

As outlined in the Lodi General Plan Health and Safety Elements, the goal for Lodi Police Department response time is an average of three minutes for emergency calls (Priority 1) and 30 minutes for non-emergency calls (Priority 2). This year (2022), the actual average response times are 4.42 minutes for emergency calls, and 26.39 minutes for non-emergency calls.

## **2. Provisions for Future Growth and Systems Improvement**

The development of recent annexations will result in additional demand for police service. The additional operations costs that result will be provided by the expanded tax base that results from new development, as well as the continuation of the residential Community Facilities Districts. Capital costs for facilities and equipment will be funded by development impact mitigation fees.

All areas outside of the City boundaries are currently under the jurisdiction of the San Joaquin County Sheriff's Department. Once annexed, the City of Lodi Police Department will expand police services in order to provide service to the project areas. As mentioned above, funding will be provided by the expanded tax base, Community Facilities Districts, and development impact mitigation fees.

## ***C. Public Services (Libraries)***

### ***1. Libraries***

The City of Lodi library, located at 201 West Locust Street, provides family programs, adult literacy programs, free public internet access, informational material, and other community services. Figure 3-3 shows the library's location relative to other public services.

As of 2022, the library had holdings of approximately 89,000 books, 25 magazine subscriptions, 8 newspapers, as well as audio books, videos, music CDs, and CD-ROM media. The Lodi Public Library serves 27,149 registered borrowers, who check out approximately 200,000 items a year. The library offers a number of services and programs to assist its users, including computer services, performances, workshops and classes, and special programs for youth.

Given Lodi's compact form, a central main library branch is appropriate, though additional neighborhood branches may be desirable. Locations for new library branches would include mixed-use centers and the Eastside, which currently has poor access to the existing library. Additionally, while most of the Public/Quasi-Public designation in the General Plan is attributed to new schools, an estimated 10-acres are assumed to be used for other public uses, such as library branches. Sites identified in the 2002 Lodi Public Library Facilities Management Plan should also be considered. The following 2010 General Plan policies are applicable to library facilities.

- GM-G4: Provide public facilities including police and fire services, schools, and libraries commensurate with the needs of the existing and future population.
- GM-P25: Locate any additional library branches to ensure all neighborhoods are served, in particular in the Eastside neighborhood and in proposed mixed-use centers.

The library is open 64 hours a week and is staffed by eight full time employees and a FY 2021-22 operating budget of \$1,666,850. A summary of expenditures and staffing are shown below.

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**Table 3-4: Lodi Library Budgets**

Library Expenditure Summary	2018/19 Actuals	2019/20 Actuals	2020/21 Budget	2020/21 Estimated Actuals	2021/22 City Council Adopted
71 - Salaries & Benefits	802,254	841,054	924,390	787,960	927,820
72 - Supplies & Services	336,886	307,130	473,000	426,600	475,700
74 - Insurances	16,125	33,000	32,900	32,900	39,350
77 - Operating Transfers	185,620	159,050	254,000	254,000	162,980
78 - Capital Projects	10,233	0	80,000	86,000	61,000
<b>Library Total</b>	<b>1,351,119</b>	<b>1,340,234</b>	<b>1,764,290</b>	<b>1,587,460</b>	<b>1,666,850</b>

STAFFING SUMMARY	2018-19 Positions	2019-20 Positions	2020-21 Positions	2021-22 Positions
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**LIBRARY**

Librarian	0.0	1.0	1.0	1.0
Library Assistant	2.0	2.0	2.0	2.0
Library Services Director	1.0	1.0	1.0	1.0
Library Technician	1.0	1.0	1.0	1.0
Literacy/Volunteer Manager	1.0	1.0	0.0	0.0
Literacy/Program Manager	0.0	0.0	1.0	1.0
Senior Library Assistant	2.0	2.0	2.0	2.0
<b>Library Total</b>	<b>7.0</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>



**Legend:**

- HS High School
- MS Middle School
- ES Elementary School
- OS Other School
- PL Planned School
- PR Private School
- Fire Station
- Police Station
- Library
- Sphere of Influence (2008)
- City Limits (2008)

**Scale:** 0 1/2 1 2 MILES

**North Arrow:** 40 acres, 10 acres

#### **D. Water Supply, Conservation and Treatment**

This section summarizes findings from City documents regarding the City's ability to provide adequate water service to the City including recent annexations. These documents include the 2020 Urban Water Management Plan (UWMP), 2012 Wastewater Master Plan, 2010 General Plan, 2012 Water Master Plan, and the 2020 Water Quality Report.

The City of Lodi Water Utility is the sole water purveyor for the City. The City's water service area is contiguous with City boundaries and covers approximately 13.6 square miles. There are a few minor connections outside the City. The service area includes a mix of residential, commercial, and industrial land use, and is characterized by an essentially flat terrain.

The City provides a small volume of water to Sunnyside Estates and Henderson School, which are located outside of the City boundary but within the General Plan boundary, in the vicinity of Harney Lane and Lower Sacramento Road. The City has been providing a small volume of water to Sunnyside Estates for potable use since 2002 through an agreement between the City and San Joaquin County Department of Public Works. Over the past year, approximately 19 AF of water (6.2 million gallons) was supplied to Sunnyside Estates. Even though the City sells water to Sunnyside Estates outside of the City service area, the volume of water is small and well below the reporting threshold of 3,000 AFY for the City to be considered a wholesale supplier.

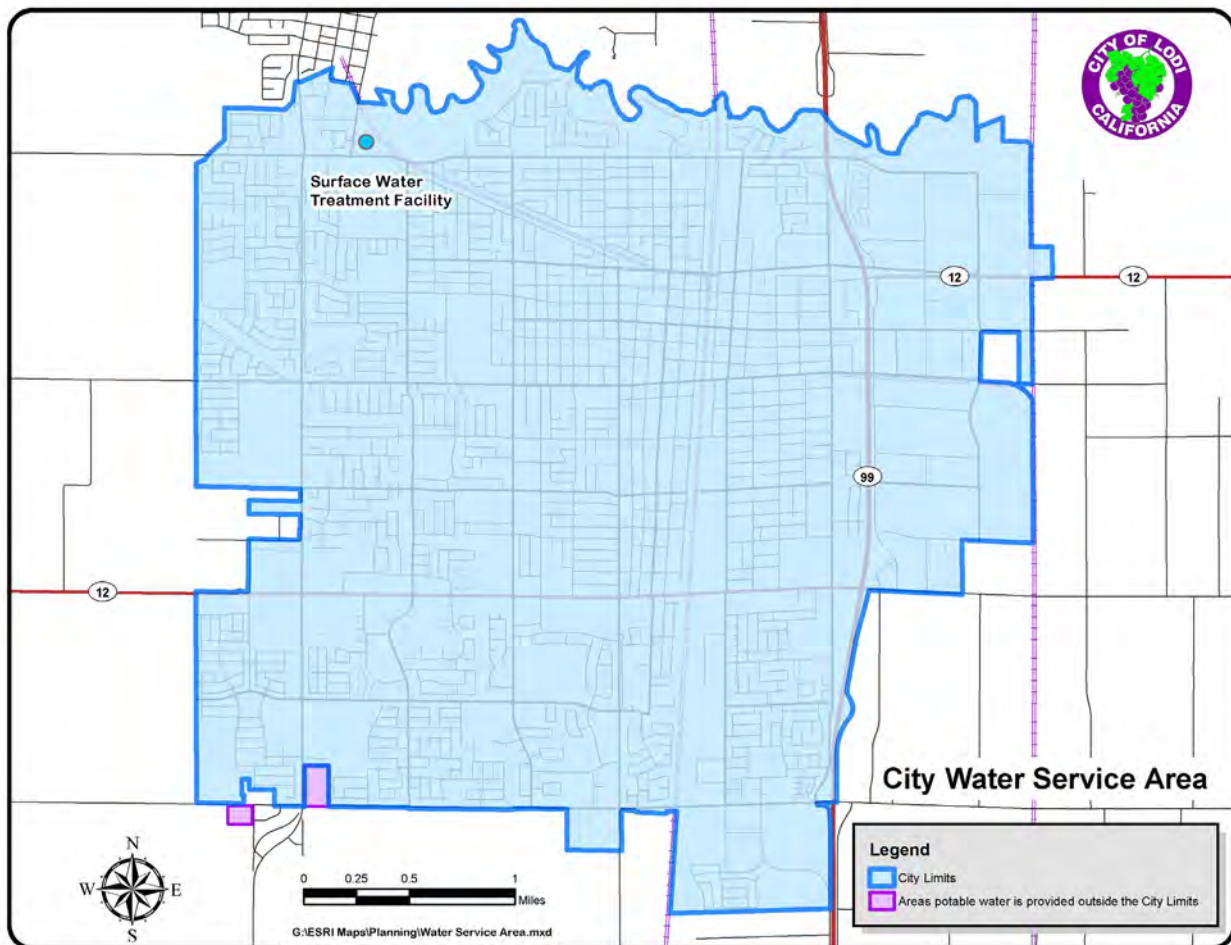
The City's Surface Water Treatment Facility (SWTF) began operation in November 2012 and is located near Lodi Lake on four acres of City-owned property. The City currently serves 26,230 metered, unmetered, and inactive municipal connections and delivers approximately 13,978 AF to its customers (Table 3-5). The City is a public water system (PWS) in accordance with the CWC and the California Health and Safety Code. The service area of the City (i.e., city boundaries) is served by one PWS, as depicted on Figure 3-4.

Table 3-5: Public Water Systems

<b>Table 2-1: Public Water Systems (DWR Table 2-1)</b>			
Public Water System Number	Public Water System Name	Number of Municipal Connections 2020	Volume of Water Supplied 2020
3910004	City of Lodi	26,230	13,978
<b>TOTAL</b>		<b>26,230</b>	<b>13,978</b>

Source: 2020 UWMP

**Figure 3-4: City Water Service Area**



## **1. Existing Supply and Demand**

### **Supply**

This section discusses the City of Lodi's two primary water sources: groundwater from the Eastern San Joaquin Basin and surface water purchased water from the Woodbridge Irrigation District (WID).

#### Groundwater

The City relies on local groundwater from the Eastern San Joaquin Subbasin and surface water supplies from the Mokelumne River purchased from Woodbridge Irrigation District (WID). The City's primary source of water is groundwater that it pumps using 28 groundwater production wells distributed throughout the water service area.

### Surface Water

From the completion of the SWTF in November 2012 through FY 2016, an average of 26 percent of the monthly water supply came from surface water instead of groundwater and an average of 300 acre-feet (AF) less water was pumped from the wells each month. (One acre-foot of water is the amount of water that covers an area one acre in size to a depth of one foot and provides sufficient supplies for three to four families annually.) Since FY 2016, surface water has provided around 50 percent of the total water supply with an associated reduction in groundwater use.

### Irrigation District Water

In May 2003, the City entered into an agreement with WID to purchase 6,000 acre-feet per year (AFY) of surface water from the Mokelumne River (with delivery via WID canal facilities near Woodbridge Dam) for a period of 40 years. In the future, the City will continue to pump groundwater and utilize treated surface water per its agreements with WID, as seen in Table 3-6. The City also has access to a banked surface water supply under its agreement with WID. The City had an agreement with North San Joaquin Water Conservation District (NSJWCD) from October 2015 through October 2020 for up to 1,000 AFY of Mokelumne River water, but no water was provided under this agreement in FY 2020.

**Table 3-6: Total Water Supplies**

<b>Table 2: Total Water Supplies – Actual and Projected (AF)</b>						
<b>Water Supply Source</b>	<b>Year</b>					
	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
Purchased Water from the Mokelumne River	6,503	6,000	6,000	6,000	6,000	6,000
Groundwater	7,475	15,000	15,000	15,000	15,000	15,000
<b>Total Water Supply</b>	<b>13,978</b>	<b>21,000</b>	<b>21,000</b>	<b>21,000</b>	<b>21,000</b>	<b>21,000</b>

### **Demand**

This section discusses the City of Lodi's potable and raw water demand, and recycled water demand.

Water production is the volume of water measured at the source (i.e., SWTF outflows and City groundwater wells), and includes all water delivered to residential, government, commercial, and industrial connections, as well as unaccounted-for water (e.g., water lost from leaking



pipes). All of the City's water came from groundwater wells before November 2012 (FY 2013) when the SWTF came online; the SWTF presently provides, on average, approximately 50 percent of the annual water production.

In 2020, 33 percent of the accounts that the City delivers water to remain unmetered and consist primarily of residential, government, and commercial customers. There is recycled water used in the vicinity of the wastewater treatment plant (WWTP); however, this water is not included as a water demand since it is not replacing water that would have otherwise been provided by the City. The recycled water is used to irrigate crops for cattle, power plant cooling, and pond replenishment.

Future water demand estimates are based on the assumptions that the City's population and housing units will increase at a consistent 1.16 percent annually and water demand per capita will stay relatively stable. By 2045, average annual water demands are expected to have increased from current demands by approximately 24 percent, from about 14,000 AFY in 2020 to about 18,300 AFY in 2045 (shown in Table 3-7).

**Table 3-7: Total Water Demands**

<b>Table 3: Total Water Demands – Actual and Projected (AF)</b>						
<b>Water Demand Sector</b>	<b>Year</b>					
	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
Potable and Raw Water	13,979	14,663	15,512	16,410	17,360	18,365
Recycled Water Demand	4,746	4,746	4,746	4,746	4,746	4,746

## **2. Existing Water Distribution System**

The City currently utilizes groundwater as its primary source of supply. The City's existing water distribution system is a 245-mile grid network of 6, 8, 10, 12 and 14-inch diameter mains, four-water storage tanks with a combined storage capacity of 5.1 million gallons and a total of 28 groundwater wells spaced at half-mile intervals throughout the City. The City built a new storage tank at Well 23 (Maggio Circle) that has been in operation since 2020. In addition, a storage tank at Well 28 (Kettleman Lane and Westgate Drive) is scheduled to be completed by 2025.

The capacity of the wells range from 1.2 to 3.0 mgd and the total capacity of the 28 existing wells is 54.8 mgd. All wells are equipped with chlorination equipment which provides system-

wide disinfection. The 28 wells have a combined capacity of 37,910 gpm or 19.9 billion gallons per year.

(Sources: 2012 Water Master Plan; 2020 UWMP)

### **3. *Water Quality***

An assessment of the drinking water sources for the City of Lodi's distribution system was completed in February 2003 and water treatment plant in August 2011. The sources are considered most vulnerable to the following activities:

- ◆ Gas stations (historic and current)
- ◆ Chemical/petroleum processing and storage
- ◆ Metal plating/finishing/fabricating
- ◆ Plastic/synthetic producers
- ◆ Dry cleaners
- ◆ Known contaminant plumes
- ◆ Sewer collection systems
- ◆ Fleet/truck/bus terminals
- ◆ Machine shops
- ◆ Utility stations and maintenance areas
- ◆ Agricultural drainage
- ◆ Photo processing/printing

The City has incorporated management measures to help maintain high groundwater quality, including cleanup work that is ongoing for PCE (Tetrachloroethylene) and TCE (Trichloroethylene), as these chemicals have been detected in wells in north and central Lodi area. The City's consultants have developed a computer model of the groundwater, which will enable the City to optimize the number, size and location of wells to accomplish the cleanup in an efficient manner.

### **4. *Demand Management and Conservation Measures***

In compliance with the Urban Water Management Act, the City's 2020 UWMP identifies a series of Demand Management Measures (DMM), also known as Best Management Practices (BMPs). These measures are designed to maximize the efficient use of water and minimize water waste.

#### **Water Waste Prevention Ordinances**

The City's ongoing Water Conservation Ordinance (Lodi Municipal Code, Chapter 13.08, Article III), first implemented in 1977 with the most recent update going into effect on December 18, 2015, defines water waste prohibitions for the City's customers. The Ordinance provides sever-

al definitions of the “waste of water,” outlines watering days and hours, describes the City’s enforcement procedures, and discusses the violations and infractions process.

The Water Conservation Ordinance has been actively enforced for ten years resulting in adjusted customer water use. In the future, the Water Conservation Ordinance will continue to set a baseline level for conservation in the City due to enforceable restrictions on water wasting activities.

### **Metering**

The City’s primary means for achieving and sustaining the urban use targets is through its Water Meter Program. The City currently meters and bills for actual water used for its metered customers and is currently implementing a program to install water meters on all unmetered commercial and residential customers and is estimated to be completed by 2025.

The City has completed all phases of the residential metering program with conversion to usage volumetric-based water rates occurring at least several months after the meter is installed. It is estimated that all customers will be transitioned to usage-based water rates by January 2025.

Various studies have estimated water savings as a result of metering and commodity pricing. Past studies have indicated that metering results in a 10 to 40 percent reduction in water use, with 15 percent as most typical.

### **Conservation Pricing**

As previously mentioned, the City is currently implementing its Water Meter Program. Water meters for all customers will be installed through 2025 with implementation of usage-based billing for all customers occurring by the beginning of 2025. The City is also working on meter installation for currently unmetered commercial customers which should also be completed by 2025. The City continues to use a water rate structure that includes a fixed service charge and a three-tier usage rate structure which is intended to help encourage water conservation.

### **Programs to Assess and Manage Distribution System Loss**

In 2001, the City implemented a capital improvement program to replace water lines, averaging one percent replacement annually. The Water Meter Program that began in 2011 included water main evaluation and replacement of mains (including relocation) that did not comply with the City’s six-inch minimum diameter criteria. The City has since completed the residential metering program.

### **Other Demand Management Measures**

The effectiveness of this program is based upon the number of rebates issued for water conservation devices (currently tracked by the City) and the percentage of customers that install the equipment after purchasing the devices. As the City becomes fully metered, the effectiveness of this DMM may be evaluated by comparing metered water use for customers before and after installation of water saving devices.

## ***5. Future Demand, Supply, and Water Projects***

### **Demand**

Water demand projections provide the basis for sizing and staging future water supply facilities. Water use and production records, combined with projections of population and urban development, provide the basis for estimating future water requirements. In addition, projected water use and supplies are also projected under the assumption that years 2021 through 2025 are drought conditions.

Future water demands were projected based on actual water use from 2015 through 2020, as measured by production rates at the City's groundwater well sites and the SWTF as well as average metered water use by customer class. Future water demand estimates are based on assumptions that the City's population and housing units will increase at a consistent 1.16 percent annual increase and water demand per capita will stay relatively stable. By 2045, average annual water demands are projected to increase from current demands by approximately 24 percent, from about 14,000 AFY in 2020 to about 18,300 AFY in 2045. Demand projections by water use sector are presented in Table 3-8.



**Table 3-8: Potable and Non-Potable Water Use**

<b>Table 4-5: Use for Potable and Non-Potable Water - Projected (DWR Table 4-2)</b>						
Use Type	Additional Description	Projected Water Use				
		2025	2030	2035	2040	2045
Single Family	Metered and unmetered accounts	7,780	8,231	8,707	9,211	9,745
Multi-Family	Metered and unmetered accounts	2,170	2,296	2,429	2,570	2,718
Commercial	Metered and unmetered accounts	3,108	3,288	3,478	3,679	3,892
Institutional/Governmental	Metered and unmetered accounts	878	929	983	1,040	1,100
Industrial	Metered and unmetered accounts	270	285	302	319	338
Losses	Calculated using AWWA software	456	482	510	540	571
<b>TOTAL</b>		<b>14,663</b>	<b>15,512</b>	<b>16,410</b>	<b>17,360</b>	<b>18,365</b>

Source: 2020 UWMP

**Supply**

The City currently uses groundwater as its primary source of supply, pumping 7,475 AF from its 28 wells in 2020, as shown in Table 3-9. The City currently has the capacity to store approximately 12.6 AF of water (5.1 million gallons) in four different storage tanks - one at the SWTF and three in key areas of the City's distribution system.

Limited recycled water is used in the vicinity of the WWTP, primarily for the City-owned agricultural fields, and at power-generating facilities owned by NCPA. Approximately 4,746 AF of recycled water was beneficially applied to or used on the City-owned lands surrounding the WWTP in 2020. This recycled water supply does not help meet potable demand and all projections would be used within the vicinity of the WWTP.

**Table 3-9: Water Supplies**

<b>Table 6-8: Water Supplies — Actual (DWR Table 6-8)</b>				
Water Supply	Additional Detail on Water Supply	2020		
		Actual Volume	Water Quality	Total Right or Safe Yield (AF)
Purchased or Imported Water	WID from Mokelumne River	6,503	Drinking Water	6,000
Purchased or Imported Water	NSJWCD from Mokelumne River	0	Drinking Water	1,000
Groundwater (not desalinated)	From 28 municipal wells	7,475	Drinking Water	15,000
Recycled Water		4,746	Recycled Water	
<b>Total</b>		<b>18,724</b>		<b>22,000</b>

Table 3-10 summarizes the projected future water supplies through 2045, including purchased water from WID, groundwater, and recycled water. In the future, the City will continue to pump groundwater and utilize treated surface water per its agreements with WID. From WID, the agreement allotment of 6,000 AF is assumed, though the supply volume may increase when the City decides to use its banked supply. The SWTF currently has a treatment capacity of 10 MGD (approximately 11,200 AFY) and is expandable to up to 20 MGD (approximately 22,400 AFY), so the City has the opportunity to expand its surface water use in the future. The potential for an increase in storage capacity in the City's distribution system, and two additional storage tanks, increases the City's reliability for providing water to its customers.

With a safe yield of 15,000 AFY estimated for the portion of the groundwater subbasin underlying the City, the City is able to reasonably project having access to that same amount of groundwater in the future. Table 3-10 notes the total amount of recycled water reasonably available is the total amount of wastewater influent from the municipal sewer line. Municipal wastewater is estimated to increase as the City's population increases.

**Table 3-10: Water Supplies - Projected**

Table 6-9: Water Supplies — Projected (DWR Table 6-9)											
Water Supply	Additional Detail on Water Supply	Projected Water Supply									
		2025		2030		2035		2040		2045	
		Reasonably Available Volume	Total Right or Safe Yield	Reasonably Available Volume	Total Right or Safe Yield	Reasonably Available Volume	Total Right or Safe Yield	Reasonably Available Volume	Total Right or Safe Yield	Reasonably Available Volume	Total Right or Safe Yield
Purchased or Imported Water	WID from Mokelumne River	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000	6,000
Groundwater (not desalinated)	From 28 municipal wells in the Eastern San Joaquin Subbasin	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000
Recycled Water		5,844		5,912		5,980		6,049		6,119	
<b>Total</b>		<b>26,844</b>	<b>21,000</b>	<b>26,912</b>	<b>21,000</b>	<b>26,980</b>	<b>21,000</b>	<b>27,049</b>	<b>21,000</b>	<b>27,119</b>	<b>21,000</b>

Source: 2020 UWMP

### Water Projects

The City, which solely relied on groundwater historically, has increased its use of surface water such that it accounts for almost half of the City's supplies. The City plans to expand SWTF capacity from 10 MGD (or 36.1 AFD) to 20 MGD (or 61.4 AFD) around 2030 or demand when needed to meet demands. This project would include new water supply agreements to increase the City's surface water supplies beyond 6,000 AFY. The SWTF expansion project is included in Table 3-8.

Since the completion of the 2015 UWMP, the City has built a new storage tank at Well 23 and is in the process of building an additional storage tank at Well 28 which should be completed in 2025. These storage tanks push back or potentially eliminate the need to construct new wells, which were determined to be needed by 2035 to meet demands in the City's Water Master Plan.

**Table 3-11: Water Supply Projects**

<b>Table 6-7: Expected Future Water Supply Projects or Programs (DWR Table 6-7)</b>					
<input type="checkbox"/>	No expected future water supply projects or programs that provide a quantifiable increase to the agency's water supply. Supplier will not complete the table below.				
<input checked="" type="checkbox"/>	Some or all of the supplier's future water supply projects or programs are not compatible with this table and are described in a narrative format.				
Page 6-23	Provide page location of narrative in the UWMP				
Name of Future Projects or Programs	Joint Project with other suppliers?	Description	Planned Implementation Year	Planned for Use in Year Type	Expected Increase in Water Supply to Supplier
SWTF Expansion	No	Expand SWTF capacity from 10 MGD (or 36.1 AFD) to 20 MGD (or 61.4 AFD) somewhere around 2030 or as demand approaches supply	2030	All Year Types	5,200 to 6,000 AFY

Source: 2020 UWMP

## **E. Wastewater Collection and Treatment**

The City of Lodi Department of Public Works provides wastewater collection and treatment for the incorporated area of the City of Lodi. The City's Wastewater Master Plan was prepared in 2012 and is the primary source for the information included in this section. This Master Plan outlines a long-term strategy for meeting future discharge and capacity requirements in order to meet community needs for a planning horizon that extends to 2020. Population projections used for wastewater facility planning were based on a 1.5 percent growth rate, which is the City's assumed annual growth rate.<sup>5</sup>

### **1. Wastewater Collection Facilities**

The City's wastewater system currently consists of about 191 miles of collection system pipelines ranging in sizes from 4 to 42 inches in diameter, with 6 inches being the predominant size. The pipelines discharge into a 48-inch sewer outfall line that was rehabilitated in 2008 reducing the pipe diameter from 48 inches to 42 inches, which flows southwest to the City's White Slough Water Pollution Control Facility (WSWPCF) located approximately six miles west of town.

<sup>5</sup> West Yost and Associates, 2001, *City of Lodi Wastewater Master Plan*, June 2012.

There are six wastewater trunk lines (Hutchins Street, Mills Avenue, Ham Lane, Lower Sacramento Road, Stockton Street/Washington Street, Beckman Road) serving the city that generally flow from the north to the south. The six wastewater trunk lines connect to the Century Boulevard Trunk Line that flows east to west, and into the 42-inch trunk sewer to the WSWPCF.

There are five lift stations located in the northern area of the city, Evergreen Pump Station, Woodlake Pump Station, Rivergate Pump Station, Mokelumne Pump Station and Cluff Pump Station, and three lift stations located in the southern area of the City, Tienda Pump Station, Harney Lane Pump Station and Reynolds Ranch Pump Station.

## ***2. Wastewater Treatment Plant Permitting and Capacity***

The wastewater treatment facility has a current average dry weather flow capacity of 8.5 million gallons per day (mgd). Current dry weather flow is 4.4 mgd. The wastewater treatment facility was originally constructed in 1966 with a capacity of 5.8 mgd. In the late 1980's and early 1990's the City expanded the treatment capacity to 6.3 mgd, and also improved the level of treatment. Between 2003 and 2009 the City again expanded the dry weather treatment capacity to the current 8.5 mgd and added denitrification, tertiary treatment and ultraviolet light disinfection improvements.

## ***3. Wastewater and Recycled Water***

The City manages about 7,800 acre-feet per year of influent flows to the WSWPCF, and about 3,500 acre-feet per year is treated to secondary level and used for agricultural irrigation near the WSWPCF for growing animal feed and fodder crops that are not for human consumption. The City uses this industrial and/or domestic recycled water to irrigate about 790 acres of agricultural land owned by the City.

## ***3. Future Wastewater Demand and System Improvements***

In accordance with the General Plan's Land Use and Growth Management Element, the City shall develop new facilities for water, wastewater and drainage as needed for development, and shall fund necessary systemwide improvements in compliance with these policies:

- GM-G2 Provide infrastructure including water, sewer, stormwater, and solid waste/recycling systems that is designed and timed to be consistent with projected capacity requirements and development phasing.
- GM-P5 Update impact fee system to balance the need to sufficiently fund needed facilities and services without penalizing multifamily housing or infill development.



- GM-P8 Ensure that public facilities and infrastructure including water supply, sewer, and stormwater facilities are designed to meet projected capacity requirements to avoid the need for future replacement and upsizing, pursuant to the General Plan and relevant master planning.
- GM-P9 Coordinate extension of sewer service, water service, and stormwater facilities into new growth areas concurrent with development phasing. Decline requests for extension of water and sewer lines beyond the city limit prior to the relevant development phase and approve development plans and water system extension only when a dependable and adequate water supply for the development is assured.

The WWTP has adequate capacity to treat all wastewater flows to Title 22 standards for recycled water (California Code of Regulations, Division 4, Chapter 3, Section 60301). The industrial wastewater, the majority of which comes from a fruit canning facility, is blended with treated flows and is stored for agricultural irrigation of neighboring City-owned land. Table 3-9 shows the volume of municipal (residential and commercial) plus industrial wastewater collected in the service area during 2020.

**Table 3-12: Collected Wastewater**

<b>Table 6-3: Wastewater Collected Within Service Area in 2020 (DWR Table 6-2)</b>						
<input type="checkbox"/>		There is no wastewater collection system. The supplier will not complete the table below.				
		Percentage of 2020 service area covered by wastewater collection system <i>(optional)</i>				
		Percentage of 2020 service area population covered by wastewater collection system <i>(optional)</i>				
<b>Wastewater Collection</b>			<b>Recipient of Collected Wastewater</b>			
Name of Wastewater Collection Agency	Wastewater Volume Metered or Estimated? <i>Drop Down List</i>	Volume of Wastewater Collected from UWMP Service Area 2020	Name of Wastewater Treatment Agency Receiving Collected Wastewater	Treatment Plant Name	Is WWTP Located Within UWMP Area?	Is WWTP Operation Contracted to a Third Party?
City of Lodi	Metered	5,787	City of Lodi	White Slough Water Pollution Control Facility	Yes	No
<b>Total Wastewater Collected from Service Area in 2020:</b>		5,787				

Improvements to the WSWPCF are currently underway. Improvements include proposed lift stations, and two new trunk lines are expected to be added to the existing wastewater system.

Current improvement plans are guided by the Phase 3 Improvements Project 2007 which calls for installation of new influent screens (two), screening washers, influent pumps (two), and new diffusers in Aeration Basins 1 and 2 and the construction of two new aeration basins and a secondary clarifier. Flow modifications are also planned for aeration basins. These improvements will increase the treatment capacity of WSWPCF to treat up to 8.5 mgd of average dry weather flows. The City's most recent permit, issued in September 2007, allows for an effluent limit of 8.5 mgd upon completion of the WSWPCF Phase 3 Improvements.<sup>6</sup>

**Table 3-13: Projected Wastewater Flow**

	<b>2001 (mgd)</b>	<b>2021 (mgd)</b>
Average	7.5	4.4
Peak Month	8.5	7.4
Peak Day	9.7	7.1
Peak Hour	14.4	15.3
Peak Day, dry weather	8.9	15.5
Peak Hour, dry weather	12.7	7.4

Source: C West Yost and Associates, January 15, 2001, City of Lodi Wastewater Master Plan.

## ***F. Stormwater Drainage***

Lodi's stormwater drainage system is managed by the City's Public Works Department. The gravity-based stormwater system consists of trunk lines, retention basins, pump stations, and surface infrastructure such as gutters, alleys, and storm ditches. Most of the basins are used as parks and recreational facilities during non-runoff periods. Stormwater is disposed by pumping into the Woodbridge Irrigation District (WID) Canal, Lodi Lake, and the Mokelumne River.

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<sup>6</sup> Swimley, Charles, Water Services Manager, City of Lodi. Written communication with Isby Swick, DC&E, October 11, 2007.



## 1. Existing Stormwater Drainage System

The City's storm drain infrastructure includes catch basins, manholes, 18 storm outlets, 227.9 acres of detention basins, 14 electrically powered pumping stations, and 110 miles of stormwater collection and conveyance piping. As of 2002-2003, the City had 2,750 catch basins and 1,600 manholes. On average, these numbers increase by 33 and 28 each year, respectively.

A significant portion of the City's stormwater runoff is released into the WID Canal. In accordance with the Storm Drainage Discharge Agreement between the City and WID, the City can discharge a maximum of 160 cubic feet per second (cfs) in the winter and 40 cfs in the summer into the WID canal. Maximum discharge rate per site is 60 cfs in the winter and 20 cfs in the summer. However, maximum discharge rates can be increased with twelve-hour notice if approved by WID. The City's most recent agreement was approved by City Council on Oct 20, 1993 and extends for 40 years. This agreement includes the City's right to modify existing Beckman and Shady Acres pump stations and to construct additional discharge points.

Excess stormwater is temporarily stored in retention basins, from where it is gradually released into the Mokelumne River, WID Canal and Lodi Lake to reduce potential flooding impacts. Many of the City's detention basins function as sports facilities during dry conditions. Table 3-11 further describes the storm drain system basin data.

**Table 3-14: Storm Drain Data**

Basin/Park	Tributary Area (acres)	Site Land Area (acres)	Detention Capacity (ac.ft.)
A-1, Kofu	491	12 <sup>1</sup>	41.5
A-2, Beckman	564	16.2 <sup>2</sup>	60.0
B-1, Vinewood	964	16.0	41.5
B-2, Glaves <sup>3</sup>	450	13.2	31.1
C, Pixley <sup>4</sup>	1,091	27.3	128.7
D, Salas	790	21.0	94.0
E, Peterson	340	20.9	61.0
F (at Kettleman)	369	30.0	68.5
F (near Tokay)		30.0	68.5
G (DeBenedetti)	866	46.3	202.0
H (Discharge to River)	428		
I (Undeveloped)	320	25.0	
<b>Total</b>	<b>6,673</b>	<b>227.9</b>	<b>728.3</b>

*Italics indicate future or partially complete facilities. 1: Kofu acreage includes park south to tennis courts, excludes Municipal Service Center (MSC) & MSC parking. 2: Beckman acreage excludes Fire Station. 3: Glaves Park formerly Twin Oaks Park. 4: Pixley volume does not include 7 ac. ft. in Beckman Rd. ditch*

Stormwater quality concerns include suspended solids and high nitrate levels (most likely from lawn fertilizers). Algal blooms below City outlets following pumping evidence this problem. The City's stormwater pumps, and detention basins are adequate for existing runoff volume. However, localized flooding has occurred at the 1700 block of Lockeford Street and residential streets southwest of Peterson Park. Improvements have been made to improve flooding problems at Lockeford Street; minor flooding in the area southwest of Peterson Park due to under-sized pipes has not yet been addressed. Systemwide modeling has not been completed to confirm and predict operation of the system as it expands.

## ***2. Future Stormwater Drainage Demands and System Improvements***

The stormwater plan for the reasonable development of the General Plan includes the division of the City's growth areas into 16 drainage watersheds. For each of these watershed areas, the tributary trunk drain, detention basin, discharge rate (gravity flow or pump station), and outfall pipeline have been preliminarily sized. These facilities are briefly described in General Plan Table 3-6, though facility planning, and sizing will need to be refined and verified through preparation of a detailed stormwater master plan.

Proposed development of recent and approved project areas will necessitate expansion and improvements to the existing Stormwater system. These improvements include:

- ◆ Lumina Subdivision is required to deepen the existing basin and construct an outlet structure.
- ◆ Gateway South subdivision is required to build a new detention basin.
- ◆ Rose Gate II subdivision is required to build a new detention basin and pump station.

## ***G. Electrical Utility***

Electrical service to the city is provided by the Lodi Electric Utility. The Lodi Electric Utility is a customer-owned and City-operated utility that provides electrical services for residential, commercial, and industrial customers in the city.

Since 1968, the Lodi Electric Utility has been a member of the Northern California Power Agency (NCPA), which is a California Joint Powers Authority comprised of seventeen public utilities. Through NCPA, Lodi Electric Utility is able to obtain electricity at cost, facilitating low energy prices for customers.

In 2007, 53% of the city's power came from renewable energy sources, primarily geothermal and small and large hydroelectric; natural gas (29%) and coal (18%) composed the remaining

power sources. Natural gas service for the Planning Area is provided by Pacific Gas and Electric Company (PG&E) and is piped from gas fields in Tracy and Rio Vista.

In calendar year 2021, Lodi used 446 gigawatt-hours (GWH) of electricity. On average, between 6,700 and 7,060 kW-hours of electricity are consumed per household per year.<sup>7</sup>

### **1. Energy Conservation**

The City currently administers and implements a variety of local energy conservation and waste reduction programs, including:

- Low-voltage LED lighting equipment in traffic signals.
- Solar assisted equipment at all new bus shelters/stops.
- Curbside recycling (which has allowed the city to meet the California Integrated Waste Management Act of 1989 requirement to divert at least 50% of waste from landfills).
- Energy education programs for children and students.
- Standards for photovoltaic panel installation.
- Lighting, heating, solar, and air conditioning rebate programs for residential and non-residential customers through the City's Electric Utility.

The General Plan seeks to reduce energy consumption through conservation efforts and renewable energy sources, as well as through land use, transportation, water, and green building and construction strategies.

Title 24 of the California Electrical Code provides energy conservation standards for residential and commercial construction. The City enforces these standards through the local building permit process.

### **2. Future Demand and Infrastructure Improvements**

The Utility projects that electrical demand will grow 11.2% from year 2020 (132.5 MWh) to year 2030 (147.3 MWh). As areas are annexed into the City, the electrical service provider will shift from PG&E to the Lodi Electric Utility. Infrastructure needs related to annexations are discussed below:

Provision of electrical service to the new residential sub-divisions in the South and West part of the City will require expansion of existing primary distribution lines and establishment of ser-

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<sup>7</sup> H. Shariar, Lodi Electric Utility, 5/13/22.

vice connections and would be funded by the developer. Power provided to the project areas would be derived from the Henning and Industrial Substations.

Provision of electrical service to industrial load growth in the East part of the City will require building a new distribution line and expansion of existing lines and would be funded by the developer. Power provided to the project areas would be derived from the Industrial Substation.

## ***H. Determination***

As the City of Lodi continues to grow, there will be a need to expand infrastructure services. The following is a summary of the major City actions that may be required to ensure adequate provision of infrastructure services for the five-year sphere horizon.

### ***1. Fire Protection***

Providing adequate service to the southern area of the City is currently a challenge faced by the Lodi Fire Department. Average response time of 4.8 minutes exceeds the three-minute goal largely due to high response times for the southern corners of the City. The new fire stations planned for the SW Gateway and Reynold's Ranch project areas will improve response times and level of service to the southern areas of the City and enable the department to provide service to the project areas.

Adequate fire service for the recently annexed areas and areas within the 10-year and 30-year horizons will be met by the development of new fire stations and increased staffing. The expanded tax base that results from new development, the continuation of the residential Community Facilities Districts, and development impact fees will provide funding for additional fire stations, equipment and personnel.

### ***2. Law Enforcement***

The City will implement policies under the General Plan Health and Safety Element which requires the City to ensure the adequate provision of police services.

- GM-G4 Provide public facilities—including police and fire services, schools, and libraries commensurate with the needs of the existing and future population.
- GM-P27 Maintain sufficient fire and police personnel and facilities to ensure maintenance of acceptable levels of service. Provide needed facilities concurrent with phased development.

### **3. Public Services**

#### Library

Additional neighborhood branches may be desirable. Locations for new library branches would include mixed-use centers and the Eastside, which currently has poor access to the existing library. The following 2010 General Plan policies are applicable to library facilities.

- GM-G4 Provide public facilities including police and fire services, schools, and libraries commensurate with the needs of the existing and future population.
- GM-P25 Locate any additional library branches to ensure all neighborhoods are served, in particular in the Eastside neighborhood and in proposed mixed-use centers.

### **4. Water Supply, Conservation and Treatment**

Future water demands were projected based on actual water use from 2015 through 2020, as measured by production rates at the City's groundwater well sites and the SWTF as well as average metered water use by customer class. Future water demand estimates are based on assumptions that the City's population and housing units will increase at a consistent 1.16 percent annual increase and water demand per capita will stay relatively stable. By 2045, average annual water demands are projected to increase from current demands by approximately 24 percent, from about 14,000 AFY in 2020 to about 18,300 AFY in 2045.

In order to provide water service to the existing population, the City will need to continue using existing supply sources including groundwater and recycled water. The estimated safe groundwater yield will increase as the City's surface area expands due to annexations within the SOI. However, the City will not approve new developments until adequate water supply is assured.

### **5. Wastewater Collection and Treatment**

Wastewater treatment for the City of Lodi is provided by the City operated White Slough Wastewater Pollution Control Facility (WSWPCF). The facility's current design capacity is 8.5 million gallons per day (mgd) and has adequate capacity to treat all wastewater flows to Title 22 standards. The service area currently generates an estimated 4.4 mgd of dry weather flow, and the plant is currently functioning at 75-percent of design capacity.

The *City of Lodi Wastewater Management Plan* projected that wastewater flow would reach 8.5 mgd in 2020, and the WSWPCF would be operating at 100-percent of design and RWQCB per-

mitted capacity. The significant infrastructure for wastewater collection and treatment needed for the development of recently annexed areas will be designed to connect to existing systems and will be funded by development fees. The City will utilize the Wastewater Master Plan update process to identify needed improvements to support additional growth within the SOI.

## **6. *Stormwater Drainage***

The stormwater plan for the reasonable development of the General Plan includes the division of the City's growth areas into 16 drainage watersheds. For each of these watershed areas, the tributary trunk drain, detention basin, discharge rate (gravity flow or pump station), and outfall pipeline have been preliminarily sized. These facilities are briefly described in General Plan Table 3-6, though facility planning, and sizing will need to be refined and verified through preparation of a detailed stormwater master plan.

## **7. *Electric Utilities***

Electrical services are provided to residential, commercial and industrial customers in the City of Lodi by the Lodi Electric Utility. The Utility is a member of the Northern California Power Agency (NPCA), a Joint Action Agency which enables the Utility to purchase and supply electricity at cost.

According to the Utility, peak demand in megawatt hours (MWh) increased 6.25 percent from 124.7 MWh in 2010 to 132.5 MWh in 2020. The Utility is planning to meet future energy needs by implementing conservation programs, as well as planning for new infrastructure. Increased energy demand generated by the development of the recent annexations is consistent with projected future energy demands, as both respond to regional growth forecasts and the City's General Plan. New infrastructure development will connect to the existing system.

Provision of electrical service to the new residential sub-divisions in the South and West part of the City will require expansion of existing primary distribution lines and establishment of service connections. Power provided to the project areas would be derived from the Henning and Industrial Substations. Provision of electrical service to industrial load growth in the East part of the City will require building a new distribution line and expansion of existing lines. Power provided to the project areas would be derived from the Industrial Substation.

The Lodi Utility has sufficient capacity to meet increased energy demand generated by recent and future annexations. Provision of electrical service to future annexations will require new infrastructure, including the expansion of existing primary distribution lines and establishment of service connections, which will be funded by the developer.

## **4 GROWTH AND POPULATION PROJECTIONS**

This chapter identifies future growth projections for the City of Lodi and its SOI that need to be taken into consideration when planning for the provision of services. A detailed discussion on existing and future municipal services to meet the future demand identified in this chapter is included in Chapter 3 of this MSR.

As discussed in Chapter 3, the City has plans and policies in place to ensure that if demand increases, as allowed by the General Plan, adequate public services will be provided, while existing levels of service are maintained.

### **A. *Population and Demographics***

The population and employment growth trends are identified in Table 4-1. This table identifies population trends within the County since 2000. The County experienced a great deal of growth in the early 2000's that slowed during the economic downturn from 2007 to 2012.

Lodi is the fourth largest city in San Joaquin County, with a population of 70,668. Between 2000 and 2015, the City of Lodi's population increased by 12 percent to 63,719 as shown in Table 4-2. The growth is consistent with the historical growth rate of 1% for the city. Growth was particularly slow between 2010 and 2015.

Neighboring cities in San Joaquin County experienced more dramatic population growth between 2000 and 2015, with the cities of Stockton and Tracy increasing 26 and 50 percent, respectively. Between 2000 and 2015, the population of San Joaquin County increased by 28 percent.

Demographic shifts experienced during this same time period in Lodi include an increase in percentage of children and 35 to 54-year-olds, and an increase in family size and non-family households, and an increase in residents of Hispanic/Latino origin. Table 4-2 identified household trends in Lodi.



**Table 4-1: Population Trends in San Joaquin County**

Cities	Years				Percent Change 2000 - 2021
	2000	2010	2015	2020	
Escalon	5,963	7,132	7,413	7,501	25.79
Lathrop	10,445	18,023	20,353	28,503	172.88
<b>Lodi</b>	<b>57,011</b>	<b>62,134</b>	<b>63,719</b>	<b>69,624</b>	<b>22.12</b>
Manteca	49,255	67,096	73,787	87,319	77.27
Ripon	10,158	14,297	14,922	16,292	60.38
Stockton	243,771	291,707	306,999	320,876	31.63
Tracy	56,929	82,922	85,296	98,601	73.19
Balance Of County	130,066	141,995	147,022	155,685	19.69
Total County	563,598	685,306	719,511	783,534	39.02

**Table 4-2: Population and Household Trends in Lodi**

	2000	2010	2015	2022
Population	57,935	62,134	63,719	68,751
Housing Units	21,442	23,792	23,830	24,383
Average Household Size	2.70 (3.4% vacant)	2.78 (7.1% vacant)	2.85 (7.2% vacant)	2.81
Single Family Units	14,468	16,446	16,483	
Multi-Family Units	6,475	6,908	6908	
Mobile Homes	499	438	439	458

Source: State of California, Department of Finance, E-1 Population Estimates for Cities, Counties and the State with Annual Percent Change — January 1, 2020, and 2021. Sacramento, California, May 2021.

The City of Lodi adopted a Growth Management Ordinance (GMO) in 1991 (Ordinance 1521, 1991). The intent of the GMO is to regulate growth in order that General Plan policies can be achieved, to ensure the adequate provision of public services and facilities, and to promote increased housing options for all segments of the population. The GMO limits the number of approved residential units to reflect a two-percent yearly population growth. This does not apply

to senior housing, commercial and industrial projects, on-site replacement housing, or projects of four units or less.

The Table 4-3 below summarizes the population growth from 2010 to 2019 with data provided by the American Community Survey and US Census.

**Table 4-3: 2010 – 2019 Population Growth**

Population Growth		
2010	62,225	
2019	67,581	
Change	5,356	
Straightline: 0.9% annual growth		
2010	62,225	62,785
2011	62,785	63,350
2012	63,350	63,920
2013	63,920	64,496
2014	64,496	65,076
2015	65,076	65,662
2016	65,662	66,253
2017	66,253	66,849
2018	66,849	67,451
2019	67,451	
ACS 2017 to 2019: 2.4% annual growth		
2017	64,403	65,949
2018	65,949	67,531
2019	67,531	
Source: ACS/US Census		

## **B. Population Projections**

There are several methods for projecting population growth. Table 4-4 below provides the population projections for the City of Lodi, from 2019 through the 30-year horizon in 2052. The table presents projections based on the assumed annual growth rate of 1.5 percent as it provides a middle ground between Lodi's historic growth rate and the maximum growth rate allowed by the General Plan. Assuming a 1.5 percent growth rate, the City population will reach 83,243 by 2032, and 110,460 by the end of the twenty-year sphere in 2052.

**Table 4-4: Projected Population Growth**

Assumed annual growth rate: 1.5%		
Current:	70,668	
10 year (2032):	83,243	
30 year (2052):	110,460	
2019	67,581	68,595
2020	68,595	69,624
21	69,624	70,668
<b>2022</b>	<b>70,668</b>	<b>71,728</b>
23	71,728	72,804
24	72,804	73,896
25	73,896	75,004
26	75,004	76,129
27	76,129	77,271
28	77,271	78,431
29	78,431	79,607
2030	79,607	80,801
31	80,801	82,013
<b>32</b>	<b>82,013</b>	<b>83,243</b>
33	83,243	84,492
34	84,492	85,759
35	85,759	87,046
36	87,046	88,351
37	88,351	89,677
38	89,677	91,022
39	91,022	92,387
2040	92,387	93,773
41	93,773	95,180
42	95,180	96,607
43	96,607	98,056
44	98,056	99,527
45	99,527	101,020
46	101,020	102,535
47	102,535	104,073
48	104,073	105,635
49	105,635	107,219
2050	107,219	108,827
51	108,827	110,460
<b>2052</b>	<b>110,460</b>	

The Lodi 2010 General Plan uses 2.7 persons per household to generate population estimates from projected housing units. The 2021 numbers from the California Department of Finance uses 2.81 persons per household. For the purpose of this MSR, 2.83 persons per household is used due the fact that most units are single-family residences. This does create different population estimates for the City.

**Table 4-5: Growth in Households**

Assumed Household Size:	2.83 persons per household
New Households 2022 - 2032	4,443
New Households 2022 - 2052	14,061

### ***C. Development Projections***

This section provides an overview of projected employment growth and residential development to accommodate new residents in Lodi. Further detail related to development projections is provided in Chapter 2.

#### ***1. Employment Growth***

Table 4-6 below summarize the City's employment growth from 2010 through 2019, and the County's projections for 2030 by employment type.

**Table 4-6: Historic and Projected Employment**

2010	25,631	
2019	28,917	
Change	3,286	
Annual Rate	1.35%	
2010	25,631	25,977
2011	25,977	26,328
2012	26,328	26,683
2013	26,683	27,043
2014	27,043	27,408
2015	27,408	27,778
2016	27,778	28,153
2017	28,153	28,534
2018	28,534	28,919
2019	28,919	
Source: ACS/US Census		
<b>San Joaquin County Projections</b>		
All Industries		
2020	2030	% Growth
330,917	379,830	14.8%
Ann. Growth Rate:		1.5%
Manufacturing		
2020	2030	% Growth
20,868	21,050	0.9%
Ann. Growth Rate:		0.1%
Professional and Business Services		
2020	2030	% Growth
32,332	36,856	14.0%
Ann. Growth Rate:		1.4%
Transportation and Warehousing		
2020	2030	% Growth
45,434	58,274	28.3%
Ann. Growth Rate:		2.8%
Construction		
2020	2030	% Growth
18,691	19,289	3.2%
Ann. Growth Rate:		0.3%

## **2. Recent Annexations**

Development of the Reynold's Ranch, Westside and SW Gateway project areas includes residential, commercial, and industrial development. These project areas are expected to accommodate population growth in Lodi until 2025.

Development of the Reynold's Ranch project site will induce population and housing growth, as it entails the conversion of existing agricultural land to urban uses. However, the initial phase of the project will emphasize retail and office development which will not substantially increase population. No displacement of housing will result from this development. The development of Reynolds Ranch project site would result in up to 1,084 units at buildout.

The land use designation for the Westside and SW Gateway project sites (including the 12 additional parcels discussed in Chapter 1) under the General Plan is Planned Residential (PR). The PR land use designation allows for single-family detached and attached homes, secondary residential units, multifamily residential units, parks, open space, public and quasi-public uses, and other compatible uses. According to the General Plan, residential development in PR designated areas will maintain a mix of residential densities, with a goal of 65 percent low-density, 10 percent medium-density, and 25 percent high-density. The development of these project sites is projected to result in 2,000 units at buildout.

## **3. Sphere of Influence**

As described in Chapter 2, the unincorporated areas of the SOI are based upon Chapter 2 of the Lodi 2010 General Plan land use plan. General Plan development potential identifies the Unincorporated SOI as containing approximately 4,000 dwelling units along with approximately 3,816 units within the existing City limits and with approved projects. The Department of Finance estimates 2015 demographics to include 23,830 dwelling units for the City. The current buildout of the City and SOI boundary would include 7,816 dwelling units. The existing City Limits and Unincorporated SOI would ultimately contain approximately 31,646 housing units.

### ***Determination***

The City of Lodi's General Plan, including the Growth Management Ordinance (GMO) discussed above, provides a framework for future growth within the City and its SOI. The GMO limits the number of approved residential units to reflect a two-percent yearly population growth. Historically, the City has experienced one percent yearly population growth. The City's 2021 population is estimated at 70,668 by the American Community Survey / US Census. Assuming a middle ground growth rate of 1.5 percent growth rate, the City will reach 87,046 by 2035.

The current City population is 70,668, 10 Year existing SOI will provide for a total additional population of 22,275, and the 30 Year SOI will provide for a total population of 110,460 which is a 56.3 percent increase above the current population. The City's ability to provide adequate service to new developments will be ensured prior to approval of new developments, in accordance with existing City policies and development regulations.



## 5 FINANCING CONSTRAINTS AND OPPORTUNITIES

This section of the MSR evaluates the funding mechanisms available for the provision of expanded services in the City of Lodi to meet future needs for fire, police, public services, water, wastewater and stormwater infrastructure, and electrical utilities. These fees and taxes ensure adequate service levels to meet the needs of the existing and projected population.

### **A.     *Development Fees***

The City of Lodi has negotiated Development Agreements for major development projects and will use the same process for future projects with the developer's consent. These agreements are relevant to all projects in which landowners agree to contribute to costs of facilities and services, and the City agrees to provide service as required. The landowner's contribution to these facilities and services is assessed by the City through Development Impact Mitigation Fees (Development Fees), which ensure that new development pays its fair share of capital improvement costs for public facilities and utilities needed to support additional growth. Development Fees are collected on a per acre basis, using Residential Acre Equivalents (RAE).

General Plan policies require the City to collect water, wastewater, drainage, and school development fees for all new residential, commercial, office, and industrial development sufficient to fund required system-wide improvements (Land Use and Growth Management Element, Goal J: Policy 2 and Goal I: Policy 7). Development fees are also collected from all new development for capital improvements and equipment for fire and police protection (Health and Safety Element, Goal C: Policy 10 and Goal D: Policy 7).

New developments that are consistent with the Circulation Element of the General Plan are required to pay their fair share of traffic impact fees and/or charges. In addition, developments that generate more traffic than assumed by the Circulation Element are required to prepare traffic studies and fund to any additional capital improvements identified by the study (Circulation Element Goal A; Policy 5).

The City also requires that new developments pay school impact fees or fulfill other commitments or obligations to the Lodi Unified School District (LUSD) as authorized by AB 2969, resolution of the LUSD Board of Education (Land Use and Growth Management Element).

### **B.     *Tax Assessment***

Previous to the passing of Proposition 13 in 1978, property taxes were the main source of local government revenue and were subject to adjustment based on local government needs.

Proposition 13 reduced property taxes by approximately 50 percent and gave the State of California the power to allocate funds gained from taxes.

Proposition 98, which passed in 1988, mandated that a minimum funding level be maintained by the State of California, which led to the Educational Revenue Augmentation Fund (ERAF) property tax shift. ERAF transferred revenues from city, county and special districts to schools. Between 1993 and 2005, ERAF resulted in the transfer of \$17.5 million from the City of Lodi to local schools.

The City of Lodi has a tax sharing agreement with San Joaquin County. This agreement addresses the adjustment of the allocation of property tax revenue between the City and County when a jurisdictional change occurs, such as annexation of unincorporated property into the City limits. The Agreement was most recently updated in June 2005. The agreement specifies property tax sharing for additional land annexed into the City, with allocations being determined by the detachment of fire districts. The City receives 20 percent of property taxes for annexations that involve a detachment from a fire district. Property tax for annexations that do not require a detachment from a fire district are shared as follows:

- ◆ If the fire district was established before June 15, 1996, the City receives 20 percent, and the County receives 80 percent.
- ◆ If the fire district was established between June 15, 1996 and June 15, 2003, the City receives 15 percent, and the County receives 85 percent.
- ◆ If the fire district was established after June 15, 2003, the City receives 10 percent, and the County receives 90 percent.<sup>1</sup>

The City of Lodi currently collects the following taxes:

- ◆ Property
- ◆ Sales and Use
- ◆ Transient Occupancy
- ◆ Franchise
- ◆ Documentary Transfer
- ◆ Motor Vehicle in Lieu
- ◆ Public Protection
- ◆ Business License

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<sup>1</sup> City of Lodi Council Communication, May 4, 2005, Agenda Item E-18: "Adopt a resolution approving Agreement for Property Tax Allocation..."

◆ In Lieu Franchise

In 2021, these taxes contributed over \$56.6 million dollars to the City's total revenue and are projected to provide for 80 percent of the General Fund for the 2021-2022 fiscal year.<sup>2</sup> As of 2022, the City has initiated negotiations with the County to restructure the existing tax sharing agreement, however a tax sharing agreement is not required for the MSR and SOI updates.

**C. *Connection and Usage Fees***

In addition to impact fees and property taxes, Lodi receives funds for the on-going provision of water, wastewater, and electricity service through connection fees and usage fees. The Lodi Department of Finance reviews these fees on an annual basis to ensure that they reflect the appropriate levels necessary to provide adequate levels of water, wastewater, and electricity service. These fees are also discussed in Chapter 7, Rate Restructuring, of this MSR.

**D. *Mello-Roos Community Facilities Districts***

The Mello-Roos Community Facilities Acts of 1982 was created in response to Proposition 13, which limited a local agency's ability to fund needed improvements and services with property tax increases based on assessed property value. This act provides an alternative financing method by allowing local government agencies to establish Mello-Roos Community Facilities Districts (CFDs) to finance needed improvements and services. CFDs are typically created in undeveloped areas and can finance streets, sewer systems, basic utility infrastructure, police and fire protection, schools, parks, libraries and other communities.

Mello-Roos CFDs are a requirement for the approval of residential maps, and therefore will be created for Reynold's Ranch, Westside and SW Gateway project areas as well as future developments within the SOI. These comprehensive CFDs will be used as a revenue source to offset the cost of ongoing maintenance for public facilities, including those for police, fire, parks/recreation, and public works.

**E. *Opportunities for Revenue Enhancement***

In November 2018, the voters in Lodi approved Measure L providing much needed revenue to maintain and enhance services in the community. Other revenue enhancing options are available, including Transient Occupancy, Business License, or additional Transactions and Use taxes. All require a vote of the Council and the public and can be considered at Council direction. Given the limited ability of the City to expand services in the face of known cost drivers, primarily CalPERS UAL increases, additional revenue may be needed to provide the level of service demanded by the community.

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<sup>2</sup> City of Lodi Annual Budget FY 2021-2022

***F. Determination***

The City of Lodi receives funds for the provision of public utilities and services through impact fees, property taxes, and connection and usage fees. These fees apply to all land that is annexed into the City. The City's Department of Finance reviews these fee structures on an annual basis to ensure that they provide adequate financing to cover the provision of city services.

The City has adequate fee structures and planning processes to ensure that the fee structures remain sufficient to cover costs of required services, and thus no financial constraints to service provision have identified. The General Plan includes policies that require new development to pay its fair share capital improvement costs for water, wastewater, electricity, schools, fire protection, and police protection facilities and services. The cost of providing on-going services for annexed land is offset by the increased tax base provided by new development. Taxes, including property and sales tax, are expected to provide 80 percent of the City of Lodi's General Fund for the 2021-2022 fiscal year.

## 6 COST AVOIDANCE OPPORTUNITIES

This chapter addresses methods that can be applied to minimize the cost-of-service provision for fire protection, law enforcement, public services, water, sewer and stormwater drainage, and electrical utilities, while still maintaining an adequate level of service.

### **A. Background**

The City of Lodi provides fire and police protection, public services (transportation, libraries and schools), water, wastewater, stormwater drainage, and electricity service within the City. The City also provides limited services to areas outside the City boundaries. As property is annexed into the City, the City will extend the service areas to include the annexed areas. The transfer of service from existing provider to the City of Lodi may be phased in order to reduce costs. This may increase overall cost to properties in the SOI, as residents and businesses in the SOI would be receiving access to additional services not currently provided. Service providers in the SOI are listed in Table 6-1.

Implementation of the City's General Plan and Growth Management Ordinance will ensure that no new development will be approved without demonstrating the required infrastructure to provide adequate levels of service is planned or in place. The cost of expanding infrastructure and services will be minimized when new development is able to connect to existing service systems.

Additional cost avoidance opportunities are being pursued by the Lodi Electric Utility and the Lodi Fire Department, as follows:

- In July 2015 the City of Lodi Fire joined a Joint Powers Agreement (JPA) with the City of Stockton Fire, Lathrop Manteca Fire District and the City of Manteca Fire Department. Benefits of forming a JPA and then develop a governance structure that meets the needs of the regional communications dispatch partnership. The formation of the group was specific to the City of Stockton provide contract services to the JPA for emergency and non-emergency dispatch services under an Operational Agreement between the JPA and the City. Each of these individual agencies is afforded equal representation on the JPA Board of Directors. The JPA is a legal public entity that is separate for the City of Stockton and all the member agencies. The JPA, is not limited to dispatch services alone, it could expand to cover fire training and equipment purchases. Furthermore, the JPA Board could engage additional fire agencies for contract dispatch services.
- The City is also studying the potential for consolidation and contraction with the five surrounding fire districts. The Lodi Fire Department Strategic Plan identifies consolidation of

fire districts as having the potential to reduce overhead costs, increase efficiency and spread cost of protection over a larger population area.

**Table 6-1 Summary of Service Providers**

<b>Service Provided</b>	<b>Before Annexation</b>	<b>After Annexation</b>
General Government	San Joaquin County	City of Lodi
Fire Protection	Woodbridge, Mokelumne, and Liberty Fire Protection Districts	Lodi Fire Department
Law Enforcement	San Joaquin County Sheriff's Department	Lodi Police Department
Schools	Lodi Unified School District (LUSD)	LUSD
Libraries		City of Lodi
Transportation	San Joaquin Regional Transit District (SJRTD)	City of Lodi, SJRTD
Water	Woodbridge Irrigation District	City of Lodi
Electrical Utilities	PG&E	Lodi Electric Utility

## **B. Determination**

As annexation occurs, duplication of costs will be avoided by ensuring that all services to be provided by the City will be removed from County responsibility. As discussed above, the City's General Plan and Growth Management Ordinance ensure that all new development plans provide the infrastructure and services necessary for population increases. Furthermore, the City does not approve new development unless the required infrastructure needed to provide adequate levels of service is planned for or is in place.

As property is annexed into the City, the City will extend their service areas to include annexed areas. While this may increase overall cost to properties in the SOI, residents and businesses in annexed area receive a higher level of service and/or provision of services not available in unincorporated areas of the SOI. The City is exploring ways to reduce the cost of transferring service providers through phasing.

Measures to reduce the cost-of-service provision and provide adequate services include selling underutilized assets, consolidating service districts, and connecting new infrastructure to existing systems. In addition to streamlining operations, retiring under-utilized equipment, and establishing a policy for full cost recovery from developers for new facilities, the Electric Utility

implemented the following rate actions to better align costs and charges. These efforts will reduce operation and maintenance costs. The potential for consolidation and contraction with the five surrounding fire districts is discussed in more detail in *Chapter 7. Rate Restructuring*. Such actions have the potential to reduce overhead costs, increase efficiency and spread cost of protection over a larger population area.

## **7 RATE RESTRUCTURING**

The purpose of this chapter is to determine the potential for minimizing the rates charged to customers for public services, while maintaining the same level of service or achieving a better level of service. As discussed in Chapter 3, the City of Lodi funds its fire and police departments exclusively through the General Fund as opposed to a fee charged for usage of the service. Therefore, these services are not included in the discussion below.

### **A. *Water and Wastewater***

The city provides annexed properties with water and wastewater services. As discussed in Chapter 5 of this MSR, development impact mitigation fees fund the capital improvements needed to connect new developments to the City's water and wastewater infrastructure. Service charges are collected by the City to pay for ongoing services. Fixed rates are established for single-family and multi-family residential units, based on the number of bedrooms per unit. Flat rates for commercial and industrial customers are based on meter size.

The City is installing water meters on un-metered properties in its service area. In accordance with California Assembly Bill 2572, the City must install water meters on all customer connections by 2025. Installation of meters will enable the City to charge water customers based on actual use, which is expected to result in a 10 to 40 percent reduction in water use, with 15 percent as most typical.

The City plans to expand SWTF capacity from 10 MGD (or 36.1 AFD) to 20 MGD (or 61.4 AFD) around 2030 or demand when needed to meet demands. This project would include new water supply agreements to increase the City's surface water supplies beyond 6,000 AFY. Additionally, new storage tanks at wells 23 and 28 push back or potentially eliminate the need to construct new wells, which were determined to be needed by 2035 to meet demands in the City's Water Master Plan.

### **B. *Electricity***

The Electric Utility Fund is used to account for all activities related to providing electric services to Lodi residents and businesses. Those services include the cost of purchasing electricity; design, construction, and maintenance of electric infrastructure (overhead and underground); customer service; engineering; administration; and debt service. The electric utility is funded by



rates charged for the electric services provided. A portion of the rates are designed to support infrastructure expenses and other rates are charged based on usage.

The Electric Utility implements a number of strategies to maintain affordable, equitable rates and ensure sufficient reserves are available to address emergencies or unplanned expenses. In addition to streamlining operations, retiring under-utilized equipment, and establishing a policy for full cost recovery from developers for new facilities, the Electric Utility implemented the following rate actions to better align costs and charges. In 2016, the utility eliminated the minimum bill, implemented a new fixed charge and reduced the number of energy tiers from 5 to 3. In an effort to avoid cost shifts associated with net energy metering, Lodi Electric implemented a new solar tariff (LMC Section 13.20.290) in 2017 whereby customers installing generation facilities of 1 megawatt or less would be required to pay all costs associated with the interconnection of their system and installation of a solar meter which will register “delivered” energy that will be charged to a customer at regular retail rates and “received” energy that will be credited at the avoided cost of said energy for excess energy delivered to the utility’s distribution grid from the customer-generator.

In addition, the electric utility has a City Council approved Reserve Policy, reviewed every three years, which requires the utility to maintain a level of reserves equal to 90 days operating cash, a \$1M capital contingency reserve as well a level of reserves included as part of the annual budget process for unexpected and/or extraordinary power supply expenses – the amount of which is calculated each year.

The electric utility’s current service rates are compared with PG&E rates in Table 7-1. The Utility’s rates are lower than PG&E rates for residential, commercial, industrial and systems users. Based on this comparison, the Utility is providing adequate service to Lodi residents for rates that are fair and reasonable.

**Table 7-1 Comparison of Expected Utility Rates (cent/kWh)**

	<b>Residential</b>	<b>Commercial</b>	<b>Industrial</b>
Lodi Electric Utility	17.6	18.4	13.4
PG&E	27	25	18
Lodi Utility rates as percent of PG&E rates	65.1%	73.6%	74.4%

Source: 2019 study completed by Michael Bell Management Consulting for Northern California Power Agency

### **C.      *Determination***

The City of Lodi sets rates and fees for water, wastewater, and electricity. The City's Finance Department is responsible for reviewing, analyzing and evaluating financial policies and procedures. The installation of water meters and implementation and exploration of an Energy Cost Adjustment evidence the City's commitment to minimizing rates charged to customers for utilities and public services. In addition, the comparative electricity rates shown in Table 7-1 show that Lodi Electric Utility is charging fair and reasonable rates to customers.

The City reviews the fees it charges for water, wastewater, and electricity on an annual basis to ensure that adequate services are provided in a cost-effective manner. Currently, fixed rates for water and wastewater are established for single-family and multi-family residential units, and flat rates for commercial and industrial customers are based on meter size. Installation of water meters, in accordance with Assembly Bill 2572, will enable the City to charge water customers based on actual use, which is expected to result in an average 15 percent reduction in water demand. Increased water rates for 2021-2022 are helping to cover the cost of PCE/TCE contamination.

## **8 OPPORTUNITIES FOR SHARED FACILITIES**

Currently, the City of Lodi provides the appropriate level of fire protection, police, schools, libraries, transportation, water, sewer, stormwater, and energy in a cost-effective manner within the City limits. In a few cases, the City provides services to areas outside the City limits. The Lodi Unified School District provides service to Lodi, North Stockton, and the unincorporated communities of Acampo, Clements, Lockeford, Victor and Woodbridge.

The focus of this section is to identify opportunities for reducing overall costs and improving services by sharing facilities and resources. The following outlines existing and potential opportunities for the City of Lodi to share facilities and resources.

### ***A. Background***

The City has already identified opportunities for reducing overall costs and/or meeting General Plan goals through sharing facilities with other agencies and establishing multi-use facilities.

#### ***1. Fire Department***

Additional fire stations will be proposed to address the ultimate sphere boundaries, as stated in the department's Strategic Plan, Strategic Planning Topic #5, Objective 1: Facilitate the planning and construction of a new Fire station facility. The expanded tax base that results from new development, as well as the continuation of the residential Community Facilities Districts, will provide funding for fire services. Development fees will address the capital cost of new fire facilities and equipment.

#### ***2. Police Department***

The development of recent annexations will result in additional demand for police service. The additional operations costs that result will be provided by the expanded tax base that results from new development, as well as the continuation of the residential Community Facilities Districts. Capital costs for facilities and equipment will be funded by development impact mitigation fees.

#### ***3. Water Supply and Distribution***

The City, which solely relied on groundwater historically, has increased its use of surface water such that it accounts for almost half of the City's supplies. The City plans to expand SWTF capacity from 10 MGD (or 36.1 AFD) to 20 MGD (or 61.4 AFD) around 2030 or demand when needed

to meet demands. This project would include new water supply agreements to increase the City's surface water supplies beyond 6,000 AFY.

#### ***4. Wastewater Treatment***

Consistent with the General Plan land uses, water, sewer, wastewater treatment, recycled water, and stormwater facilities are planned and sized assuming a reasonable growth rate and development potential, which for the Urban Reserve areas includes: the industrial areas reaching a 50% level of development and the residential areas reaching a 75% level of development. These facilities are briefly described in General Plan Table 3-6. Though facility planning and sizing will need to be refined and verified through preparation of a detailed wastewater master plan.

#### ***5. Stormdrain System***

The stormwater plan for the reasonable development of the General Plan includes the division of the City's growth areas into 16 drainage watersheds. For each of these watershed areas, the tributary trunk drain, detention basin, discharge rate (gravity flow or pump station), and outfall pipeline have been preliminarily sized. These facilities are briefly described in General Plan Table 3-6, though facility planning and sizing will need to be refined and verified through preparation of a detailed stormwater master plan.

### ***B. Determination***

As stated in Table 8-1, the City of Lodi has existing and planned shared facilities, both within the City and through relationships with other service providers, including San Joaquin County. These shared facilities include the Lodi Police Department Headquarters that will house the San Joaquin County Superior Court, the City's contracts with the Woodbridge Irrigation District (WID) for surface water from the Mokelumne River and use of the WID canal for stormwater drainage, the City's agreement to provide wastewater treatment services to Flag City, and combination stormwater basins and parks.

Multiple planning processes are in place to identify future opportunities for shared facilities that will improve levels of service in a cost-effective manner and contribute to meeting General Plan goals. These planning processes include the City's annual budgeting process, the planning processes for utilities (i.e., water services, wastewater services, electric utility), and for fire and police services.

**Table 8-1 Shared Detention Basin and Park Facilities**

<b>Description/ Park Amenities</b>	
<b>Existing Park/Basin</b>	
A-1, Kofu	Baseball fields, tennis and basketball courts, skate park, picnic area, restrooms
A-2, Beckman	Baseball and soccer fields, dog area, play area, picnic area, restrooms
B-1, Vinewood	Baseball and soccer fields, dog area, restrooms
B-2, Graves	Baseball and soccer fields, play area, picnic area, restroom
D, Salas	Baseball and soccer fields, play area, picnic area, restroom
E, Peterson	Baseball and soccer fields, inline hockey, tennis and basketball courts, play area, picnic area, restroom
<b>Planned Basins</b>	
C, Pixley	Approved Community Park
F (at Kettleman)	
F (near Tokay)	
G, DeBenedetti	Approved Community Park

Source: City of Lodi Stormwater Management Program, 2003.

## **9 GOVERNMENT STRUCTURE**

This section analyzes the benefits and constraints of the Lodi government structure in regard to the provision of public services. As previously noted in this MSR, the City of Lodi, San Joaquin County, and several special districts and municipal service districts provide services and infrastructure within the SOI.

As discussed in Chapter 6, the City is studying the potential to provide contract services for the Woodbridge Fire District and employ all firefighters currently employed by Woodbridge Fire District, in order to enhance the level of service provided to areas currently in the Woodbridge Fire District.

### **A. Background**

#### **1. City of Lodi**

The City of Lodi governs within its incorporated boundaries. Residents ultimately oversee the provision of public services within the City's jurisdiction as the City is run by an elected City Council who answer to the public through the electoral process. Annexed properties within the City's SOI are provided with a wide range of public services including municipal water, sewer, and stormwater drainage. Therefore, annexation increases the potential for services to be made available to unincorporated areas of the SOI. In the case of fire protection, the structure of the City's services includes several districts that may benefit from consolidation as annexation occurs.

#### **2. San Joaquin County**

San Joaquin County Service Maintenance Districts are governed by the San Joaquin County Board of Supervisors, which sets rates and fees within the service districts and ensures adequate service is provided to customers. These districts include parks, lighting and maintenance, drainage, wastewater collection and treatment. As annexation occurs, San Joaquin County services will be taken over by the City as it merges County services areas into its own service systems. Table 6-1 lists the County districts within the SOI that will be transferred to the City after annexation.

#### **3. Other Districts and Municipal Service Providers**

In addition to the City of Stockton and San Joaquin County, there are several other special districts and municipal infrastructure and service providers in the SOI (i.e., Woodbridge, Moke-

lumne, and Liberty Fire Protection Districts, San Joaquin Regional Transit District (SJRTD). These other service providers include water districts, wastewater collection and treatment districts, and fire districts.

#### ***4. Practices and Performance***

The City of Lodi, San Joaquin County, and several other special districts and private utility companies (i.e., PG&E) provide services and infrastructure within the incorporated and unincorporated areas of the SOI. Expansion of urban development within the SOI is dependent upon the extension of infrastructure and provision of services from the City of Stockton. As an incorporated city, the Lodi City Council establishes fee structures and directs the provision of police, fire, water, wastewater, and stormwater drainage services based on service level goals and standards.

The City intends to work with property owners and the County to annex all areas within its SOI to consolidate services and increase efficiencies and infrastructure and service deliveries. As planned development occurs within the SOI, the City will extend and expand infrastructure and services logically and efficiently pursuant to the City's General Plan and supporting master plans. Provision of infrastructure and services by the City within the SOI will not duplicate or conflict with the provision of infrastructure or services by other providers, as stated in General Plan Policy GM-P6 – "Annex areas outside the existing sphere of influence to conform with development needs for Phase 1, Phase 2, and Phase 3. Subsequent phases shall be annexed as current phases reach development thresholds."

Infrastructure and services that will be provided with annexation will, in most cases, enhance those services currently available; however, there may also be a corresponding increase in service fees. The City's General Plan goals and policies support the City's intention to annex and provide services within the SOI and provide services in a cost-effective manner. The City is committed to provide City services and facilities within the SOI upon annexation in conformance with City Council adopted policies and master plans. For unincorporated islands within the city limits, the City is committed to working in good faith with all stakeholders, including property owners, members of the public, and other government agencies, to prepare feasibility studies regarding the annexation of these islands.

#### ***B. Management Efficiencies***

The City undertakes long-range planning programs to better plan and budget for needed improvements to services and facilities. For example, the City's General Plan identified the potential for growth and establishes the baseline for other plans, such as water and sewer master

plans. Using these long-range plans as a basis, the City uses its annual budgeting process to balance expenditures for provision of needed services with anticipated income. During this process, the City analyzes the need for City staffing, equipment and facilities for the following year, and department heads are encouraged to continually explore methods to minimize the cost for services while maintaining a high level of service.

### ***C. Government Accountability***

The City of Lodi was incorporated in 1906 as a Charter City. Today Lodi operates under a Manager/Council form of government with 421 employees budgeted for Fiscal Year 2021-22.

The City of Lodi is a general law city, governed primarily by the laws of the State of California and by its own ordinances and regulations. The City Council establishes local laws, sets policies, approves programs, appropriates funds, supervises the operations of City government. City Council Members are elected on a by-district basis from five single-member Council districts by voters residing in the district in which the Council Member resides (learn more about Council Districts). Council Members hold four-year terms. Elections for members of the Council are held in November of even-numbered years. There is no limit to how many terms a person may serve as a Lodi City Council Member.

Actions of the City Council, including opportunities for public involvement and public hearing, are regulated in accordance with the Brown Act (California Government Code Section 54950 et seq.), other applicable statutes and regulations, and City procedures. The City Attorney is responsible for ensuring compliance with the Brown Act and the City's governing codes.

### ***D. Determination***

Since the City of Lodi is an incorporated city, the City Council will make final decisions concerning fee structures and provision of services. As discussed in previous chapters, the City of Lodi reviews its fee structures on a regular basis. The City's General Plan also has numerous goals, objectives, policies and actions to ensure that adequate services are provided in a cost-effective manner to accommodate new growth.

The residents of Lodi have a range of opportunities to oversee the activities of elected, appointed, and paid representatives responsible for the provision of public services to the community through elections, publicized meetings and hearings, as well as through the reports completed in compliance with State and federal reporting requirements.



The City has demonstrated the ability to work with other service providers and districts to ensure that adequate services are provided in a cost-effective manner. Efforts to ensure effective government structure for the provision of schools, fire protection, and water supply demonstrate the City's foresight to plan for future service needs as City boundaries expand due to annexations and population increases. Assuming that the City continues to evaluate the existing government structure and seeks opportunities for improvement, no significant barriers are expected in regard to government structure during the five-year sphere horizon.

The City has implemented successful mergers and continues to explore opportunities to work with other service providers. Since the merging of 18 elementary school districts and the Union High School District in 1996 to form LUSD, the district has obtained over \$100,000,000 in State bond funds for construction and renovation of school facilities. The City is currently exploring the potential to contract services for the Woodbridge Fire District. These efforts demonstrate the City's efforts to work with other districts to provide cost-efficient, high-level service within the City and its SOI.

## 10 EVALUATION OF MANAGEMENT EFFICIENCIES

Efficiently managed entities consistently implement plans to improve service quality while containing costs. The purpose of this section is to evaluate the City of Lodi's functions, operations, and practices as they pertain to the ability of the City to provide quality services to meet current and future demand.

LAFCo is required to consider the advantages and disadvantages of any options that might be available to provide the services. In reviewing potential government structure options, consideration may be given to financial feasibility, service delivery quality and cost, regulatory or government frameworks, operational practicality, and public reference.

### **A. Background**

The City of Lodi undertakes long-range planning programs to better plan and budget for needed improvements to services and facilities. The 2010 Lodi General Plan – Growth Management and Infrastructure Element, Parks Recreation and Open Space Element and the Safety Element include implementation programs which outline schedules for service review, as summarized in Table 10-1. The timeframe for service reviews ranges from ongoing to every 5-10 years.

**Table 10-1: Schedule for Service Review**

<b>Task</b>	<b>Responsibility</b>	<b>Time Frame</b>
Capital Improvement Program that identifies and sets priorities for water, wastewater, and drainage improvements	Planning Department Public Works Department	Ongoing
Urban Water Management Plan	City Council Public Works Department	Every 5 years
Water Master Plan Update	City Council Public Works Department	Every 5-10 years
Wastewater Master Plan Update	City Council Public Works Department	Every 5-10 years
Drainage Master Plan Update	City Council Public Works Department	Every 5-10 years
Review fee ordinance for funding needed for water, wastewater drainage, and other improvements	City Council Public Works Department	Every 5 years

Review of fee ordinance to provide funding for capital improvements and equipment for fire and police protection	City Council	Ongoing
	Fire Department	
	Police Department	
	Public Works Department	

Source: 2010 Lodi General Plan – Growth management and Infrastructure Element, Parks Recreation and Open Space Element and the Safety Element.

The City’s annual budgeting process is used to balance expenditures for provision of needed services with anticipated revenue. During this process, the City analyzes the need for City staffing, equipment and facilities for the following year, and department heads are encouraged to continually explore methods to minimize the cost for services while maintaining a high level of service. The annual budget is used as a planning tool by the City.

## ***B. Determination***

The 2010 Lodi General Plan identified a reasonable growth area for the 25-year planning horizon and the necessary infrastructure to serve this area and population. The 2010 General Plan sets a baseline for other planning documents, and the annual City Budget and regular service reviews will ensure that the City of Lodi continues to provide adequate levels of service in a cost-effective manner within its service area. The City’s annual budgeting process balances service expenditures and analyzes the need for City staffing, equipment and facilities for the following year.

The ability to serve the anticipated growth within the SOI is not expected to have a significant effect on governmental structure of the City or its ability to provide services. Mechanisms are in place within City departments to effectively provide for public participation in the planning and development process to address growth within the SOI. The City will continue to work with service providers such as the LUSD, SJRTD, PG&E and others, to address government structure options to provide efficient and cost-effective public facilities and services.

The City of Lodi General Plan has numerous goals, objectives, policies and actions to ensure that adequate services are provided in a cost-effective manner to accommodate new growth, and implementation programs that include schedules for review of capital improvement programs and fee ordinances for funding infrastructure improvements. Implementation programs also provide schedules for updating the City’s Water Master Plan, Wastewater Master Plan, and Drainage Master Plan. Timeframes for service reviews ranges from ongoing to every 5-10 years. These long-term planning processes for the City of Lodi are contributed to by city departments and community input. The City will continue to use these processes to ensure management effectiveness, and to meet goals, objectives and policies established by the General Plan.

The City's current management process is adequate and meets the needs of the City. The City has demonstrated the ability to work with other service providers and districts to ensure that adequate services are provided in a cost-effective and well-planned manner. Efforts to ensure effective government structure for the provision of fire and police protection, transportation, water supply, wastewater treatment, and storm drainage facilities demonstrate the City's foresight to plan for future service needs as City boundaries expand due to annexations and population increases. The City will continue to evaluate the existing government structure and seek opportunities for improvement. Therefore, no significant barriers are expected in regard to government structure during the 10 and 30-Year Horizons.

## **11 LOCAL ACCOUNTABILITY AND GOVERNANCE**

This section assesses the level of accountability provided by the City of Lodi to those it serves, focusing on the public accessibility and level of public participation offered in regard to the operation of the City.

### **A. *Background***

The City of Lodi was incorporated on December 6, 1906. The City of Lodi is a General Law city that operates under the City Council/City Manager form of municipal government with 391 employees budgeted for 2015-2016. This general law format allows for citizens to elect a governing body that will set policy, pass ordinances and resolutions, and approve fiscal spending.

The City of Lodi has five elected officials. The City Council consists of the Mayor (Mayor Pro Tempore) and three council members and is the City's governing body having primary responsibility for enacting legislation and policies. The City also has an elected City Treasurer. The Mayor is elected by fellow council members on an annual basis, and City Council Members are elected for four-year terms. However, there are no term limits for the Mayor or City Council Members. Regular City Council meetings are held on the first and third Wednesday of every month at 7:00 p.m. at the Carnegie Forum, located at 305 W. Pine Street. Council meetings are broadcast live on SJTV Channel 26 and rebroadcast the following Friday at 3:00 p.m. In addition to council meetings, informational sessions ("Shirtsleeve sessions") are held most Tuesdays at 7:00 a.m., also at Carnegie Forum.

The City Council appoints a seven-member Planning Commission, of which each member serves a four-year term. Established by State law, the purpose of the Planning Commission is to review changes to the City's General Plan and zoning regulations to ensure the development in Lodi is of the highest quality and to provide recommendations to Council on such matters dealing with community development. The Commission is responsible for holding public hearings that elicit public comment on development plans. The Commission meets the second and fourth Wednesday of every month at 7:00 p.m., also at the Carnegie Forum.

The City of Lodi has additional boards, commissions and committees that advise the City Council. Registered voters of San Joaquin County are invited by the City to apply for positions on boards, commissions and committees as they become available.

The official City Council meeting agenda is posted at least 72 hours before regular meetings and at least 24 hours before special meetings, according to Government Codes sections 54954.2 and 54956. The official City of Lodi posting location is at the Lodi Carnegie Forum, located at 305 W. Pine Street, where it is available to the public 24 hours a day. Additional posting locations include Lodi City Hall and the City Clerk's Office, both located at 221 W. Pine Street, and at the Lodi Public Library, located at 201 W. Locust Street. Agendas are also posted on the City's website.

City Council Guidelines allow for public comment during City Council meetings for both agenda and non-agenda items. However, public comment time for non-agenda items is limited to five minutes (Council Guideline #1). The public may contact the City Council via written correspondence, including e-mail, or verbal correspondence (voice mail). Written correspondence sent to any member of the City Council by a member of the public is forwarded to the Mayor, each Council Member, the City Manager, City Attorney, and any affected Department Heads (Council Guideline #2).

City Hall, the primary location for City administrative function, is located at 221 West Pine Street and is open from 7:30 a.m. to 5:30 p.m., Monday through Thursday and alternating Fridays from 8:00 am to 5:00 pm. The City provides its residents with information on City policy and upcoming opportunities for public involvement on its website and on SJTV Channel 26. In addition, residents are notified as required by law for public hearings.

The City prepares annual reports according to State and federal regulations on General Plan implementation process, water quality, growth for the Department of Finance, and Community Development Block Grant (CDBG) implementation. These reports are available to the public for review and comment.

## ***B. Determination***

The City of Lodi is a General Law city that operates under the City Council/City Manager form of municipal government, and therefore residents of Lodi are offered a range of opportunities to oversee the activities of elected, appointed and paid representatives responsible for the provision of public services to the community through elections, noticed meetings and hearings, as well as through the reports completed in compliance with State and Federal reporting requirements. The City's website provides up-to-date public access to meeting agendas, service departments, documents for public review, and other resources. Annual City reports on General Plan implementation process, water quality, growth, and Community Development Block Grant (CDBG) implementation are also made available for public review and comment.

The City has five elected officials, including the mayor and four council members, and holds council meetings twice a month. Additional informal sessions are held every week. Council guidelines allow for limited public comment during City Council meetings. The resident-elected City Council appoints a Planning Commission to provide recommendations to Council on such matters dealing with community development.

The City of Lodi is an incorporated city, and the City Council makes final decisions concerning fee structures and provisions of service. Actions of the City Council, including opportunities for public involvement and public hearings, are regulated in accordance with the Brown Act (California Government Code Section 54950 et seq.), other applicable statutes and regulations, and City procedures. The residents of Lodi are offered a wide range of opportunities to oversee and provide input on the activities of elected, appointed, and paid representatives responsible for the provision of public services to the community through elections, noticed meetings and hearings, as well as through the reports completed in compliance with State and Federal reporting requirements.