

# Wheeler Crest Community Services District (DRAFT)

## MUNICIPAL SERVICE REVIEW & SPHERE OF INFLUENCE REPORT

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# Executive Summary – Municipal Service Review

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## 1. Growth and Population Projections for the Affected Area

- ✓ The Mono County General Plan Land Use Element allows for additional development in the area served by the WCCSD.
- ✓ Growth is anticipated to occur primarily in existing developed areas.
- ✓ The population in Swall Meadows is projected to increase to 187 by 2030, creating an increased demand for services. This growth is based on a 0.5% population increase year over year. This figure was used as a conservative estimate based on the population declining slightly between 2010 and 2020.
- ✓ Policies in the **Wheeler Crest Area Plan** in the **Mono County General Plan Land Use Element** require the county to allow additional residential development only when adequate services, including water, are available.
- ✓ Recent changes to State law create a potential for increased density on residential parcels in Swall Meadows (up to three units: a main residence, an ADU and JADU). These changes have the potential to increase the demand for WCCSD's services.

## 2. Location & Characteristics of Disadvantaged Unincorporated Communities

- ✓ No part of Swall Meadows, nor any area contiguous to it, is designated as a DUC per the CaLAFCO statewide DUC map.
- ✓ Communities in Mono County are geographically isolated from one another, so it is rare for communities to be located within or adjacent to the SOI of service-providing district and not receive services from such district.

## 3. Infrastructure Needs and Deficiencies

- ✓ Development in Wheeler Crest is limited to the existing private land base and one community parcel for the fire department. The district has indicated that the physical infrastructure required for the area is largely in place and operating to the satisfaction of most residents.
- ✓ The district completed drilling and placing a new well into service between 2010 and 2012. The new well is referred to as Well 5 and provides redundancy in the system.
- ✓ The district analyzes water supply data and monthly water use data to provide for the area's projected buildout.

## 4. Financial Ability of Agencies to Provide Services

- ✓ The CSD's future financing will continue to rely on property assessments, excess water use charges, and hookup fees.
- ✓ The district has a long-term planning document that identifies needed capital facilities and the costs associated with developing those facilities.
- ✓ The district belongs to several water associations in California and these present low-cost financing opportunities for capital improvements.
- ✓ The Wheeler Crest area is a discrete geographic area within Mono County; there is no duplication of service efforts or overlapping or inefficient service boundaries.

- ✓ Integrated planning, especially long-range planning, is an important part of cost avoidance.
- ✓ Southwestern Mono County (Wheeler Crest and Paradise) includes other special district service providers that have administrative costs associated with the overall management of those districts. There could be some duplication of services among the districts, particularly in areas such as personnel management, insurance, risk management, financial management services, etc. Further studies would be necessary to determine whether there are opportunities to reduce costs.
- ✓ Customers in the district pay an annual assessment. Depending in which Zone of Benefit the customer is located, they also pay excess water use charges. The district periodically reviews and adjusts its fees and assessments in order to ensure that they are sufficient to cover present and future operating costs.

## 5. Opportunities for Shared Facilities and Resources

- ✓ Due to geographic distances between communities in the county, sharing facilities among water providers is not possible.
- ✓ Wheeler Crest includes other special district service providers that require facilities to support their services. There may be opportunities for shared facilities among the districts. Further studies would be necessary to determine whether there are opportunities to reduce costs.

## 6. Accountability for Community Service Needs, Including Governmental Structure and Operational Efficiencies.

- ✓ The CSD complies with the minimum requirements for open meetings and public records. The district maintains a website where the public can access overviews of the current systems, procedures, consumer confidence reports, recent correspondence, and information about recent projects.
- ✓ Per the results of the “Website Compliance Checklist” from the Golden State Risk Management Authority, there is room for improvement regarding the following elements:
  - Compliance with State Controller Reports:
    - (1) The Financial Transaction Report (a link to the controller’s “By The Numbers” website posted on the website);
    - (2) Compensation Report (a link to the controller’s public pay website posted in a conspicuous location on the website).A separate evaluation of compliance with CA Gov Code 7405 is needed. This code section requires state governmental entities to comply with the accessibility requirements of section 508 of the Federal rehabilitation act of 1973.
- ✓ The district seeks to inform the community of district activities and services. Technical and fiscal data for the district are provided to all customers on an annual basis as a minimum.
- ✓ The CSD is managed by an elected Board of Directors.
- ✓ The district plans for the future based on buildout of the service area, analysis of historical household water usage, and records of current usage within the district.

- ✓ In regions of the county with separate, distinct communities that are geographically remote from each other, public services are most logically provided by a combination of several single purpose special districts.
- ✓ If further study indicated that consolidation of services in Wheeler Crest under one service provider could save money and if Wheeler Crest residents were in favor of consolidation, fire protection, water services, and other local services could be provided by one multi-purpose agency in the future.

## Executive Summary - Sphere of Influence Findings

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### 1. Present and Planned Land Uses

Land use within Wheeler Crest is predominantly single-family residential. The planned land uses for the area are single-family residential uses. Development will occur within the existing developed area.

Recent changes to State law create a potential for increased density on residential parcels in Swall Meadows (up to three units: a main residence, an ADU and JADU). These changes have the potential to increase the demand for WCCSD's services.

### 2. Present and Probable Need for Public Facilities and Services

Wheeler Crest has an existing and continuing need for public facilities and services to serve the residential development in the area.

### 3. Present Capacity of Public Facilities and Adequacy of Public Services

The district currently provides a good level of service to its customers. As a Community Service District, it is authorized to provide a variety of other services.

### 4. Social or Economic Communities of Interest

The district area exhibits social and economic interdependence with communities in Inyo County. An interdependence with those communities has no relevance in determining the SOI for the district since special districts cannot provide services outside of their county.

### 5. Present and Probable Need for District Services of Any DUCs

The District provides domestic water and fire flow services to Swall Meadows. However, there are no DUCs, as defined by CaLAFCO DUC Map, within or adjacent to the existing SOI.

## Executive Summary - Sphere of Influence Recommendation

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The SOI for the WCCSD encompasses the existing district area along with additional private lands in the Wheeler Crest community.

# I. Introduction

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## Municipal Service Reviews

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (CKH) requires Local Agency Formation Commissions (LAFCOs) to conduct comprehensive reviews of all municipal services in each county in California and to periodically update that information. The purpose of the Municipal Service Reviews (MSR) is to gather detailed information on public service capacities and issues.

## Relationship Between MSRs and Spheres of Influence

The CKH requires LAFCOs to develop and determine the Sphere of Influence (SOI) for each applicable local governmental agency that provides services or facilities related to development. Government Code Section 56076 defines a SOI as “a plan for the probable physical boundaries and service area of a local agency.” MSRs must be completed prior to the establishment or update of SOIs (§56430(a)). SOIs must be reviewed and updated as necessary, but not less than once every five years (§56425).

The information and determinations contained in an MSR are intended to guide and inform SOI decisions. MSRs enable LAFCO to determine SOI boundaries and to establish the most efficient service provider for areas needing new service. They also function as the basis for other government reorganizations. Section 56430, as noted above, states that LAFCO can conduct these reviews “before, in conjunction with, but no later than the time it is considering an action to establish a SOI.”

The Wheeler Crest Community Service District (WCCSD) MSR is being conducted in response to, and in conjunction with, an update of the SOI for the district.

## Revised MSR Requirements

California Senate Bill 244, passed in 2011 and in effect since 2012, significantly revised the requirements for MSRs. Since the previous MSR for the district dates to 2009, this is the first review written to the new requirements.

The 2003 LAFCO MSR Guidelines detailed nine determinations necessary to an MSR, each consisting of between five and forty-nine elements. These requirements have been streamlined. The new requirements, pared down to a list of seven, still review land use, demographics, present and future service needs as compared with capacity, and the financial ability of agencies to provide services. They additionally require agencies to give special consideration to Communities of Interest and Disadvantaged Unincorporated Communities (DUCs) during the review.

## 2023-2025 MSR/SOI Update Process and Approach

The last comprehensive update of the MSRs & SOIs for all Special Districts in Mono County occurred in 2009. Due to the length of time between updates, LAFCO is using a unique approach to update the MSRs and SOIs of sixteen Special Districts in unincorporated Mono County (list below).

1. Antelope Valley Fire Protection District
2. Birchim Community Services District
3. Bridgeport Fire Protection District
4. Bridgeport Public Utility District
5. Chalfant Valley Fire/Community Services District
6. Hilton Creek Community Services District
7. June Lake Fire Protection District
8. June Lake Public Utility District
9. Lee Vining Fire Protection District
10. Lee Vining Public Utility District
11. Long Valley Fire Protection District
12. Mono City Fire Protection District
13. Paradise Fire Protection District
14. Wheeler Crest Community Services District
15. Wheeler Crest Fire Protection District
16. White Mountain Fire Protection District

This work was partially funded by a California Development Block Grant (CDBG) awarded to the County by the California Department of Housing and Community Development (HCD) in February 2021. Resource Concepts, Inc. (RCI) was awarded the contract for this work through an RFP process approved by the Board of Supervisors on May 10, 2022. The intent of this three-phase project was to better understand the exact opportunities and limitations of special districts, as these limitations are a potential barrier to housing production in unincorporated Mono County. The final CIP deliverable will be finalized in April 2024 and will go to the Board of Supervisors in May 2024 for review and potential approval. Approval of the final deliverables will go before the Board of Supervisors in June 2024. The deadline for grant funds to be expended is June 16, 2024.

- Phase One conducted extensive data gathering from Districts and summarize (in table form) the updates necessary for 2023/2024 Reports for sixteen Special Districts. Implementing the revisions was not part of RCI's scope of work so updates were made by LAFCO staff.
- Phase two included a needs assessment for the key sites (identified in the Mono County Housing Element) and communities within each special district. RCI performed a more thorough investigation of infrastructure barriers and opportunities within the communities of Bridgeport, Crowley Lake, June Lake, and Lee Vining, and the key sites identified in the Housing Element.
- Phase 3 included developing a key sites Capacity Improvement Plan (CIP) with recommendations for Bridgeport, Crowley Lake, June Lake, and Lee Vining communities.

The remaining eleven Special Districts in both the unincorporated County and the Town of Mammoth Lakes will be completed via a contract with Bauer Planning and Environmental Services, Inc. (BPES, Inc.) and LAFCO staff time (as needed).

1. Mammoth Community Water District
2. Mammoth Lakes Fire Protection District
3. Mammoth Lakes Mosquito Abatement District
4. Southern Mono Hospital District
5. Town of Mammoth Lakes
6. Mammoth Lakes Community Service Area



7. County Service Area #1
8. County Service Area #2
9. County Service Area #5
10. Countywide CSA
11. Antelope Valley Water District (LAFCO Staff)

## Community Services Districts

### Overview

A Community Services District (CSD) is a Special District, a form of local government created by a local community to meet a specific need or needs. Unlike most special districts that provide a single service, CSD's are formed via California Government Code §61000 (originally passed in 1951 and commonly referred to as "Community Services District Law") and can provide multiple services to a community. In fact, CSD's can provide up to 32 different services, such as water, garbage collection, wastewater management, security, fire protection, public recreation, street lighting, mosquito abatement services, library services, etc. CSD's are governed by a board of five directors, elected by resident voter to four-year terms. CSD's are particularly helpful as a local government option for communities in the unincorporated areas of California.

### Financing Tools

California Government Code §61115, grants CSD's the authority to establish rates or other charges for services and facilities that the district provides. Charges can be either collected on the tax roll in the same manner as property taxes or collected with the rates or charges for any other services and facilities provided by the district.

CSD's have two financing tools, the first is fees or charges for services provided by the district and the second are special assessments based on the specific benefit each parcel receives from the improvements. Assessments are a levy against district lands that receive special benefits from operation of the district works. The approval of Proposition 218 in 1997 requires any new or increased assessments may be imposed only if proportional to the special benefits provided supported by a detailed engineer's report, and approved by a majority vote of the affected landowners.

### Mono County CSD's

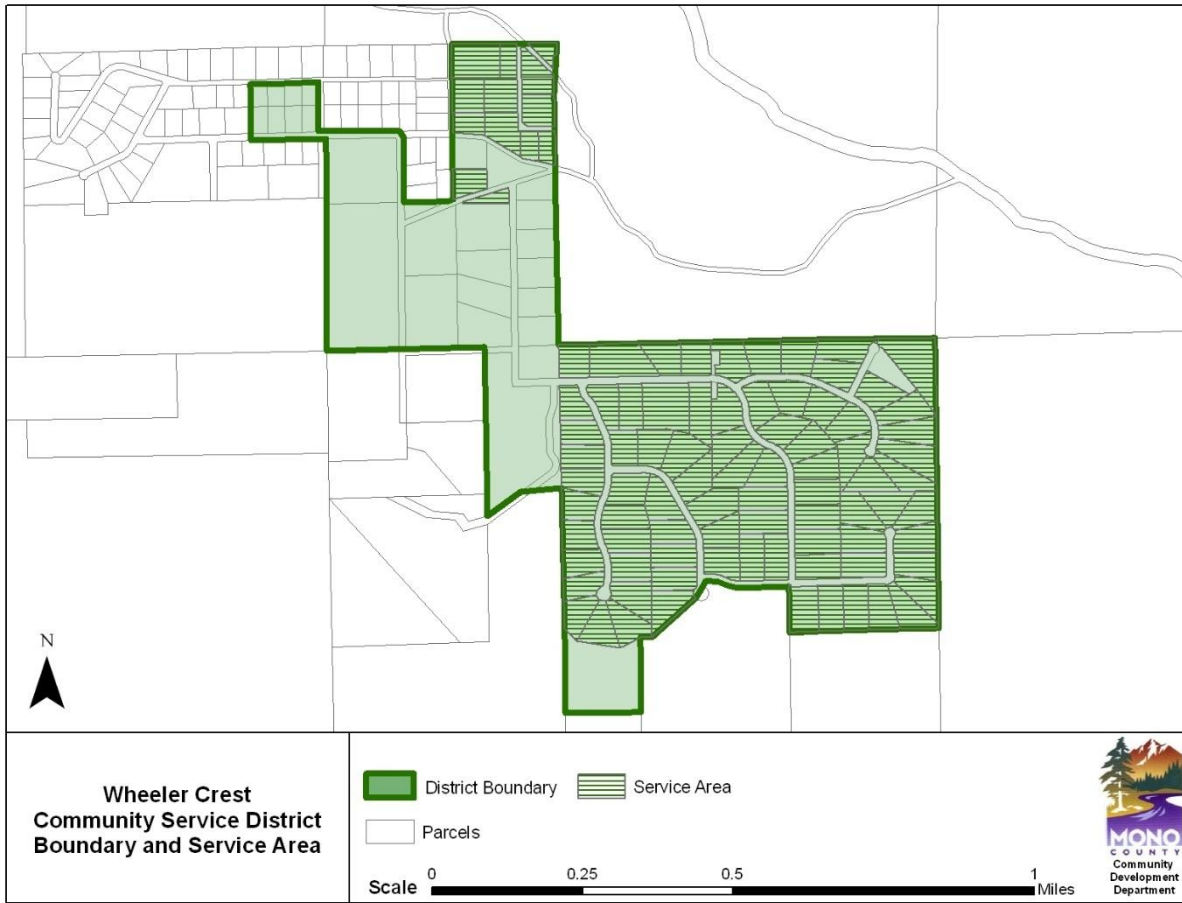
Mono County has five CSDs (listed below), four that provide services to the unincorporated communities of Sunny Slopes, Chalfant Valley, Crowley Lake, and Swall Meadows and one that provides service to the incorporated Town of Mammoth Lakes.

1. Birchim CSD
2. Chalfant Valley CSD & Fire
3. Hilton Creek CSD
4. Wheeler Crest CSD
5. Mammoth Lakes CSD

## II. District Overview

GENERAL INFORMATION	
<b>Agency Type</b>	Community Services District (CSD)
<b>Date Formed</b>	Established in 1984 to manage a new water system in the Pinon Ranch subdivision. The district expanded in 1988 to include the existing water system for the Hilltop Estates subdivision.
<b>Location/Community</b>	The district boundaries include portions of the development in Wheeler Crest and cover approximately 460 acres. The district's service areas are smaller than the district boundaries and cover approximately 250 acres (see Figure 1).
<b>Population Served</b>	Mono County GIS estimates there are 236 parcels in the district, including approximately 118 developed parcels. Population data from the 2020 US Census and California Department of Finance population estimates show the population of the Wheeler Crest area, including areas outside of the district's boundaries, to be 178 in 2020. (Census 2020).
<b>Last MSR/SOI Update</b>	2009
<b>Services Provided</b>	The district provides water service to a full- and part-time residential population in the community of Wheeler Crest. The district currently has 49 water connections, in two separate water systems.
<b>Other Services</b>	As a Community Service District, the district is authorized to provide a wide array of services, including water treatment and distribution, fire protection, parks and recreational services, street lighting, police protection, and library services.
<b>Website</b>	<a href="https://www.wheelercrestcsd.org/index.html">https://www.wheelercrestcsd.org/index.html</a>
<b>Independent/Dependent</b>	Independent
<b>District Personnel</b>	The district has no employees but relies on volunteers. The district has two Certified Water Distribution Operators. District personnel utilize California Rural Water Association classes for various training, as needed or available.
<b>District Issues/Concerns</b>	The district has indicated that its future growth is limited by the limited private land base in the area. Residents of the Wheeler Crest area who are not within one of the service areas of the district have individual wells and little incentive to pay to join the WCCSD systems. Over the long-term, the district is concerned about maintaining sources of safe, clean water for the region.

Figure 1 – District Boundaries



### III. Municipal Service Review Analysis and Determinations

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In order to prepare and to update SOIs in accordance with California Senate Bill 244, CKH §56425 & §56430(a) require the commission to conduct a service review of the municipal services provided in the county or other appropriate area designated by the commission. The commission shall include in the area designated for service review the county, the region, the subregion, or any other geographic area as is appropriate for an analysis of the service or services to be reviewed, and shall prepare a written statement of its determinations with respect to each of the following:

1. **Growth and population projections** for the affected area.
2. Location & characteristics of any **disadvantaged unincorporated communities** in or contiguous to the SOI.
3. Present and planned **capacity of public facilities, adequacy of public services, and infrastructure** needs or deficiencies including needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the SOI.
4. **Financial ability of agencies** to provide services.
5. Status of, and **opportunities for, shared facilities.**
6. Accountability for **community service needs, including governmental structure and operational efficiencies.**
7. **Any other matter** related to effective or efficient service delivery, as required by commission policy.

These seven factors are listed below and analyzed in the discussions that follow.

#### 1. Growth and Population Projections for the Affected Area

*Purpose: To evaluate service needs based on existing and anticipated growth patterns and population projections.*

##### Existing and Anticipated Residential Growth Patterns in Long Valley

The Wheeler Crest area is a small, contained area of residential development. There are currently 233 lots in the entire development, including areas outside of the district's boundaries; approximately 50 percent of the lots are developed. The remaining acreage is designated for single-family residential development with one or two-acre minimum lot sizes. The Mono County General Plan Housing Element 2019-2027 provides for the following buildout in Wheeler Crest:

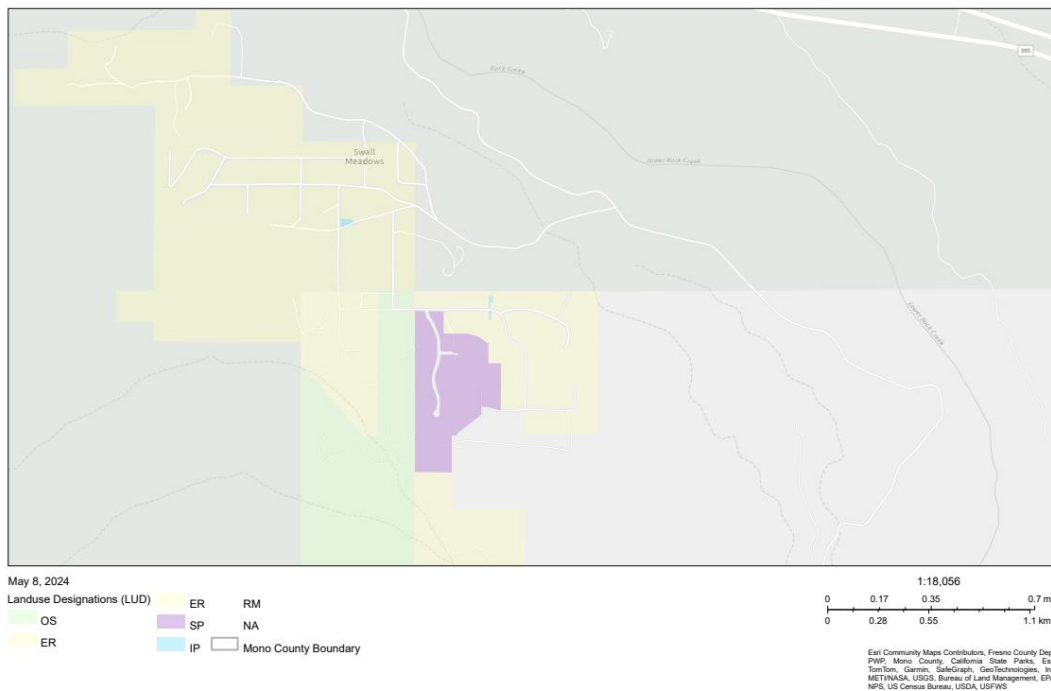
Table 1 – Buildout Figures

Quick Facts <sup>6</sup>	Wheeler Crest Buildout Potential		
<b>Communities:</b> Swall Meadows (pop: 220) Paradise (pop: 155)  <b>Housing Units: 216</b>  <b>Lowest average household size (2.13) and highest median age in County (53.4)</b>  <b>Highest percentage of owner-occupied units in County (93.8%)</b>	<b>Land Use Designation</b>	<b>Acres</b>	<b>Unit Potential</b>
	ER	719	232
	RM	3	2
	SFR	130	154
	<b>Total</b>	<b>852</b>	<b>389</b>
<b>Buildout Potential Remaining: 45.5%</b>			

Planned Land Uses

The Wheeler Crest area is a small, contained area of residential development (see Figure 2). There are currently 233 lots in the entire development, including areas outside of the district’s boundaries; approximately 50 percent of the lots are developed. Mono County GIS estimates that there are 126 parcels within the district’s boundaries, including approximately 63 developed parcels. Additional acreage in the area has a one- or two-acre minimum lot size that can be developed with single-family residential development.

Figure 2 – Land Use Designations Map



In response to the State-wide housing crisis, recent changes in State law have streamlined the regulations and simplified the process necessary to construct Accessory Dwelling Units (ADU). A new type of dwelling unit, a Junior Accessory Dwelling Unit (JADU) has been established in State law that would allow residential land use designated parcels to construct a total of three housing units: a main residence an ADU, and a JADU. Mono County General Plan Land Use Element, Chapter 16 – Accessory Dwelling Units reflects these changes and defines a JADU and ADU as:

*“Junior accessory dwelling unit” means a unit that is no more than 500 square feet in size and contained entirely within an existing single-family structure. A junior accessory dwelling unit may include separate sanitation facilities, or may share sanitation facilities with the existing structure. The junior accessory dwelling unit must contain cooking facilities.”*

*“Accessory Dwelling Unit” (also referred to as “dependent,” “Secondary Housing,” or “granny unit”) means residential occupancy of a living unit located on the same parcel as the primary residential unit. It provides complete, independent living facilities for one or more persons including permanent provisions for living, sleeping, eating, cooking, and sanitation on the same parcel as the primary unit is situated. An Accessory Dwelling Unit shall meet the minimum regulations for an efficiency dwelling unit in the California Building Code.”*

The implementation of these regulations has the potential to increase the demand for services in Swall Meadows.

### Area Plan Development Policies

The **Wheeler Crest Area Plan** in the **Mono County General Plan Land Use Element** contains several policies that address public facilities and services in Wheeler Crest, i.e.:

*“GOAL 24. Retain, as nearly as possible, the character and quality of life presently enjoyed in the community.*

*Objective 24.A. Prevent incompatible or conflicting uses within the Wheeler Crest community.*

*Policy 24.A.1. The timing and location of new residential developments shall be directed to areas with existing services or adjacent to areas with existing services (i.e., fire protection, water supply, sewage and utilities).*

*Action 24.A.1.a. In-fill, to the greatest extent possible, developed private land to the residential densities specified in this plan (i.e., Estate Residential designation, one-acre minimum lot size). Overall densities for areas outside existing developed areas shall not exceed one unit per two acres (Estate Residential designation, two-acre minimum lot size). As specified in the Plan EIR and other Plan policies, larger minimum lot sizes may be appropriate for sensitive resource areas.*

*Action 24.A.1.b. Require developers, at time of application submittal, to demonstrate adequate service availability (water supply, fire flow, sewage/septic, utilities).*

*Action 24.A.1.c. If any extension of services will be required for a proposed project, an economic analysis, including projected public costs, shall be required.*

*Action 24.A.1.d. Consider, and mitigate, the cumulative impact of any new development prior to project approval.*

*Objective 24.D. Ensure adequate public services (e.g., fire protection) and infrastructure (e.g., water supply, sewage treatment, utilities) for the area.*

*Policy 24.D.1. Ensure that necessary public facilities are planned for as new residential development is proposed. Ensure that adequate land, in appropriate locations, is set aside for public facilities.*

*Action 24.D.1.a. The Mono County Health Department and the Wheeler Crest Community Services District shall evaluate, as the community expands, the need for community water systems in the planning area.*

*Action 24.D.1.b. Maximize groundwater recharge by protecting natural drainage areas and encouraging their preservation as open space.*

*Action 24.D.1.c. Encourage use of all water saving devices, above and beyond CalGreen building code requirements at building construction.”*

## Population Projections

Population data from the 2020 US Census and California Department of Finance population estimates show the population of the Wheeler Crest area to be 178 in 2020. The population is projected to increase to 187 by 2030, creating an increased demand for services. This growth is based on a 0.5% population increase year over year. This figure was used as a conservative estimate based on the population declining slightly between 2010 and 2020.

## Determinations

- ✓ The Mono County General Plan Land Use Element allows for additional development in the area served by the WCCSD.
- ✓ Growth is anticipated to occur primarily in existing developed areas.
- ✓ The population in Wheeler Crest is projected to increase to 187 by 2030, creating an increased demand for services.
- ✓ Policies in the **Wheeler Crest Area Plan** in the **Mono County General Plan Land Use Element** require the county to allow additional residential development only when adequate services, including water, are available.
- ✓ Recent changes to State law create a potential for increased density on residential parcels in Swall Meadows (up to three units: a main residence, an ADU and JADU). These changes have the potential to increase the demand for WCCSD's services.

## 2. Location & Characteristics of Disadvantaged Unincorporated Communities

Senate Bill 244, passed in 2011, requires LAFCO identify Disadvantaged Unincorporated Communities (DUCs) when making MSR determinations (Government Code section 56430(a)), SOI determinations (Government Code section 56425(e)(5)) and certain city annexations. DUCs are defined in the bill as “a fringe, island, or legacy community in which the median household income is 80 percent or less than the statewide median household income.

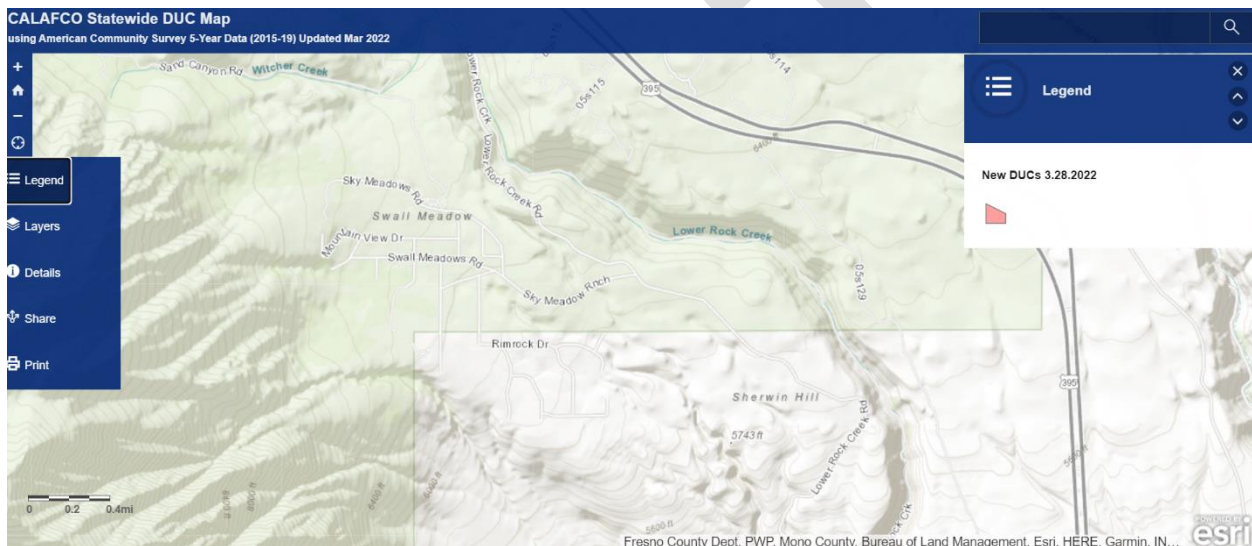
CaLAFCO created an online map identifying DUCs in every California county based on the most recent and accurate household income data released by the Census Bureau on December 10, 2020. The



purpose of CaLAFCO’s DUC Map is to enable any LAFCO that has not already identified DUCs within their respective county to utilize it as the source of the most recent household income data and DUC designations. No part of the Swall Meadows, nor any area contiguous to it, is designated as a DUC (See Figure 3, below).

The intent of SB 244 is “to encourage investment in these communities and address the complex legal, financial, and political barriers that contribute to regional inequity and infrastructure deficits within disadvantaged unincorporated communities.” As communities in Mono County are geographically isolated from one another, it is rare for communities to be located within or adjacent to the SOI of a service-providing district and not receive services from such district.

Figure 3: CaLAFCO Statewide DUC Map



### Determinations

- ✓ No part of Swall Meadows, nor any area contiguous to it, is designated as a DUC per the CaLAFCO statewide DUC map.
- ✓ Communities in Mono County are geographically isolated from one another, so it is rare for communities to be located within or adjacent to the SOI of service-providing district and not receive services from such district.

### 3. Infrastructure Needs and Deficiencies

*Purpose: To evaluate the infrastructure needs and deficiencies of a district in terms of capacity, condition of facilities, service quality, and levels of service and its relationship to existing and planned service users.*

#### Services Provided

The district provides water service to a full- and part-time residential population in the community of Wheeler Crest. The district currently has 49 water connections, in two separate water systems.



The Hilltop Estates water system serves 14 lots in Hilltop Estates, all of which are developed. Water from an artesian well in the west end of Swall Meadows is gravity fed to a 7,500-gallon underground reservoir and from there to individual residences.

The Lower Swall Meadows water system serves 81 lots in the Pinon Ranch and Rimrock Ranch subdivisions. Thirty-five of those lots are developed. The system includes 2 wells, a 100,000- gallon reservoir at the top of Pinon Ranch, a 120,000-gallon reservoir at the top of Rimrock Ranch, and a gravity-fed distribution system with 22 fire hydrants.

The district does not serve any areas outside of its boundaries but does donate water for the Wheeler Crest Fire Protection District's training exercises.

### Water Supply

All of the district's water is groundwater. Water for the Hilltop Estates water system is provided by an artesian well at the west end of Swall Meadows. Water for the Pinon Ranch water system is provided by two wells with capacities of approximately 55 and 95 gallons per minute. The district completed drilling and placing a new well into service between 2010 and 2012. The new well is referred to as Well 5 and provides redundancy in the system, to maintain capacity while providing flexibility in system maintenance.

### Water Storage & Distribution

The Hilltop Estates water system has a 7,500-gallon underground storage tank. The Pinon Ranch water system has one above ground storage tanks of 100,000 gallons and one underground storage tank of 120,000 gallons. Both systems utilize gravity fed distribution systems.

The district also has 22 fire hydrants, each fed by 6-inch mains and having one 4.5-inch outlet and two 2.5 inch outlets. The hydrants are operated and flow-cleaned twice a year.

### Water Quality & Treatment

Water is chlorinated monthly in the Hilltop Estates water system and quarterly in the Pinon Ranch water system. Both systems are monitored by the Mono County Health Department and are routinely sampled for water quality and characteristics.

### Water Demand

Annual water demand is approximately 5 million gallons.

### District Personnel

The district has no employees but relies on volunteers. The district has two Certified Water Distribution Operators. District personnel utilize California Rural Water Association classes for various training, as needed or available.

### District Planning

The district has established water supply data for development of new projects, and analyzes water supply data and monthly water use data to provide for the area's projected buildout. The district completed drilling and placing a new well into service between 2010 and 2012. The new well is referred to as Well 5 and provides redundancy in the system.

## District Issues of Concern

The WCCSD serves a small area of residential development that is surrounded by public lands and land owned by the Los Angeles Department of Water and Power. Future development in the area is limited by the small private land base. The district has indicated that the physical infrastructure required for the area is largely in place and operating to the satisfaction of most residents.

## Determinations

- ✓ Development in Wheeler Crest is limited to the existing private land base and one community parcel for the fire department. The district has indicated that the physical infrastructure required for the area is largely in place and operating to the satisfaction of most residents.
- ✓ The district completed drilling and placing a new well into service between 2010 and 2012. The new well is referred to as Well 5 and provides redundancy in the system, to maintain capacity while providing flexibility in system maintenance.
- ✓ The district analyzes water supply data and monthly water use data to provide for the area's projected buildout.

## 4. Financial Ability of Agencies to Provide Services

### Financing Constraints and Opportunities

*Purpose: To evaluate factors that affect the financing of needed improvements.*

*Overview: Expenses for special districts generally fall into one of three categories: (1) acquisition of facilities and major capital equipment, (2) employee expenses, and (3) ongoing operations and maintenance costs. The primary criteria that should be considered when evaluating adequacy of potential funding sources is availability, adequacy to meet the need, equity between existing and future residents, stability, and ability to cover on-going operating and maintenance costs.*

The district's main sources of revenue are annual assessments, excess water usage charges, and connection fees. The district considers its fiscal health to be good. The district does not participate in any joint financing, cost sharing or purchasing other than the Joint Powers Insurance Agency (JPIA—the insurance organization of the Association of California Water Agencies), nor does it utilize any shared facilities.

The CSD is dependent on property assessments, excess water use charges, and hookup fees for its revenue. These fees are reviewed periodically to ensure that they are adequate. The district has a long-term financial planning document to ensure that it will have adequate funding sources both in the short-term and long-term.

**Table 2 – Water Activity Revenues and Expenses – Fiscal Year 2019-2020**

<b>Operating Revenues</b>	
Charges for services	\$2,029
Assessments	<u>\$40,264</u>
<b>Total Operating Revenues</b>	<b>\$42,293</b>
<b>Operating Expenses</b>	
Services and supplies	\$46,817
Depreciation	<u>\$37,904</u>
<b>Total Operating Expenses</b>	<b>\$84,721</b>
Operating Income	(\$42,428)
<b>Non-Operating Revenues (expenses)</b>	
Interest and investment earnings	\$3,457
Interest expense	(\$2,569)
Grant revenues	<u>\$23,588</u>
<b>Total Non-Operating Revenues</b>	<b>\$24,476</b>
<b>Change in net position</b>	<b>(\$17,952)</b>
<b>Net position, beginning of year</b>	<b>\$503,297</b>
<b>Net position, end of year</b>	<b>\$485,345</b>

**Cost Avoidance Opportunities**

*Purpose: To identify practices or opportunities that may aid in eliminating unnecessary costs.*

*Overview: Cost avoidance opportunities are defined as actions to eliminate unnecessary costs derived from, but not limited to, duplication of service efforts, higher than necessary administration/operation cost ratios, use of outdated or deteriorating infrastructure and equipment, underutilized equipment or buildings or facilities, overlapping/inefficient service boundaries, inefficient purchasing or budgeting practices, and lack of economies of scale.*

Generally, in Mono County each community area is a discrete geographic area and, as a result, there is no duplication of service efforts or overlapping or inefficient service boundaries. Southwestern Mono County is its own discrete geographic area with distinct community areas in Wheeler Crest and Paradise.

The district has a long-term financial planning document to ensure that it will have adequate funding sources both in the short-term and long-term. Service demand projections for the future are based on historical usage, current usage, and buildout figures. The CSD is managed and administered by an elected board of directors and staffed by volunteers. The district has little equipment other than the components of the water system.

There are two other special districts within the area, the Wheeler Crest Fire Protection District and the Paradise Fire Protection District. Each of these districts is small with limited physical and financial resources. However, the focus of the FPDs and the CSD is very different and there is limited physical overlap of the district boundaries.

## Opportunities for Rate Restructuring

*Purpose: To identify opportunities to positively impact rates without decreasing service levels.*

*Overview: As noted in the Financing Constraints and Opportunities Section, the district's funding includes property taxes, connection fees, customer use/service charges, and grants. Each of these categories has inherent constraints that prevent an agency from restructuring them.*

## Customer Use/Service Charges

The district has two water systems, each of which operates under a separate Zone of Benefit for funding purposes. Residences in Zone 1 pay an annual water assessment that includes all water use. Residences in Zone 2 pay an annual water assessment that includes 15,000 gallons of water per month. Water meters are required for all lots in Zone 2 and the district charges a fee for excess water use. The district also charges connection fees.

The district periodically reviews and adjusts its fees and assessments in order to insure that the district is collecting sufficient funds to cover its operating costs. The district considers its fiscal health to be good.

## Grants

Grant money is a one-time source that is useful in funding certain special projects but may be too unreliable or variable for ongoing expenses or recurring needs.

## Determinations

- ✓ The CSD's future financing will continue to rely on property assessments, excess water use charges, and hookup fees.
- ✓ The district has a long-term planning document that identifies needed capital facilities and the costs associated with developing those facilities.
- ✓ The district belongs to several water associations in California and these present low-cost financing opportunities for capital improvements.
- ✓ The Wheeler Crest area is a discrete geographic area within Mono County; there is no duplication of service efforts or overlapping or inefficient service boundaries.
- ✓ Integrated planning, especially long-range planning, is an important part of cost avoidance.
- ✓ Southwestern Mono County (Wheeler Crest and Paradise) includes other special district service providers that have administrative costs associated with the overall management of those districts. There could be some duplication of services among the districts, particularly in areas such as personnel management, insurance, risk management, financial management services, etc. Further studies would be necessary to determine whether there are opportunities to reduce costs.
- ✓ Customers in the district pay an annual assessment. Depending in which Zone of Benefit the customer is located, they also pay excess water use charges. The district periodically reviews and

adjusts its fees and assessments in order to ensure that they are sufficient to cover present and future operating costs.

## 5. Opportunities for Shared Facilities

*Purpose: To evaluate the opportunities for a jurisdiction to share facilities and resources to develop more efficient service delivery systems.*

*Overview: Sharing facilities and resources can result in a more efficient and cost-effective delivery of resources.*

### Sharing Facilities with Other Water or Sewer Districts

Due to the geographic distance between most communities in the county, sharing facilities among water and sewer districts is not possible.

### Sharing Facilities with Other Entities within Wheeler Crest

Currently, the district does not share any facilities. Wheeler Crest includes other special district service providers that require facilities to support their services. There may be opportunities for shared facilities among the districts. Further studies would be necessary to determine whether there are opportunities to reduce costs.

## Determinations

- ✓ Due to geographic distances between communities in the county, sharing facilities among water providers is not possible.
- ✓ Wheeler Crest includes other special district service providers that require facilities to support their services. There may be opportunities for shared facilities among the districts. Further studies would be necessary to determine whether there are opportunities to reduce costs.

## 6. Accountability for Community Service Needs, Including Governmental Structure and Operational Efficiencies.

### Local Accountability and Governance

*Purpose: To evaluate the accessibility and levels of public participation associated with an agency's decision-making and management processes.*

*Overview: Districts are subject to the Ralph M. Brown Act for meetings, agendas and minutes. They are also subject to the Public Records Act. As such, Special districts are required to adopt budgets at open public meetings and to file their budgets with the county auditor. They are required to have annual or biennial independent audits. Complying with the minimum open meeting and information requirements is not sufficient to allow an adequate amount of visibility and accountability. Outreach efforts, including convenient meeting times, additional notice of meetings and dissemination of district information, are desirable.*

The CSD complies with the minimum open meetings and public information requirements. The district is governed by a five-member Board of Directors that meets quarterly. Meeting notices and agendas are posted at the fire station and on the community bulletin board. The district website meets the requirements of SB 929 (<https://www.wheelercrestcsd.org/index.html>).

The district disseminates information to its customers through a Consumer Confidence Report and a District Information Sheet sent annually to each customer. Customers are notified within 48 hours if a bacteria sample is out of tolerance.

Table 3 – Board Roster

BOARD MEMBER	POSITION	TERM EXPIRES
Charles Tucker	Chair	11/30/2022
Brent Miller	Treasurer	11/30/2024
Dale Schaub	Secretary	11/30/2024
Dan Connors	Director	11/30/2024
Brain Cashore	Director	11/30/2022

Special Districts are required to comply with a variety of local, State, and Federal requirements, including:

1. Adopting budgets at open public meetings;
2. Filing budgets with the County Auditor;
3. Annual or biennial independent audits;
4. Ralph M. Brown Act for meetings, agendas and minutes; and
5. Public Records Act.

Table 4 (below) is the “California Website Compliance Checklist” from the Golden State Risk Management Authority that outlines the various State and Federal transparency requirements.<sup>i</sup> Complying with the minimum open meeting and information requirements is not sufficient to allow an adequate amount of visibility and accountability. Outreach efforts, including convenient meeting times, additional notice of meetings and dissemination of district information, are desirable.

Table 4. Website Compliance Checklist

**PUBLIC RECORDS ACT**

YES  NO

**SB 929 – THE SPECIAL DISTRICT HAS CREATED AND MAINTAINS A WEBSITE**

- Passed in 2018, all independent special districts must have a website that includes contact information (and all other requirements) by Jan. 2020.
- Hardship exemptions are allowed but they are limited.<sup>ii</sup>

YES  NO

**SB 272 – THE SPECIAL DISTRICT’S ENTERPRISE SYSTEM CATALOG IS POSTED ON THEIR WEBSITE**

- All local agencies must publish a catalog listing all software that meets specific requirements – free tool at <https://www.getstreamline.com/sb272>

YES  NO

**AB 2853 (OPTIONAL) - THE SPECIAL DISTRICT POSTS PUBLIC RECORDS TO THE WEBSITE.**

- This bill allows Districts to refer PRA requests to your site, if the content is displayed there, potentially saving time and money.

## THE BROWN ACT

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YES  NO

**AB 392: AGENDAS ARE POSTED TO OUR WEBSITE AT LEAST 72 HOURS IN ADVANCE OF REGULAR MEETINGS, 24 HOURS IN ADVANCE OF SPECIAL MEETINGS.**

- This 2011 update to the Act, originally created in 1953, added the online posting requirement.

YES  NO

**AB 2257: A LINK TO THE MOST RECENT AGENDA IS ON OUR HOME PAGE, AND AGENDAS ARE SEARCHABLE, MACHINEREADABLE AND PLATFORM INDEPENDENT.**

- Required by Jan. 2019— text-based PDFs meet this requirement, Microsoft Word docs do not.

## STATE CONTROLLER REPORTS

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YES  NO

**FINANCIAL TRANSACTION REPORT: A LINK TO THE CONTROLLER'S "BY THE NUMBERS" WEBSITE IS POSTED ON OUR WEBSITE.**

- Report must be submitted within seven months after the close of the fiscal year. Districts can add the report to their website annually, but posting a link is easier.

YES  NO

**COMPENSATION REPORT: A LINK TO THE CONTROLLER'S PUBLICPAY WEBSITE IS POSTED IN A CONSPICUOUS LOCATION ON OUR WEBSITE.**

- Report must be submitted by April 30 of each year. Districts can also add the report to their website annually, but posting a link is easier.

## HEALTHCARE DISTRICT WEBSITES

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YES  NO  N/A

**AB 2019: IF THE SPECIAL DISTRICT IS A HEALTHCARE DISTRICT, A WEBSITE IS MAINTAINED THAT INCLUDES ALL ITEMS ABOVE, PLUS ADDITIONAL REQUIREMENTS.**

- Including budget, board members, MSR, grant policy and recipients, and audits.

## OPEN DATA

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YES  NO  N/A

**AB 169: ANYTHING POSTED ON THE SPECIAL DISTRICT'S WEBSITE THAT IS CALLED "OPEN DATA" MEETS THE REQUIREMENTS FOR OPEN DATA.**

- Defined as "retrievable, downloadable, indexable, and electronically searchable; platform independent and machine readable" among other things.

## SECTION 508 ADA COMPLIANCE

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YES  NO  TBD

**CA GOV CODE 7405: STATE GOVERNMENTAL ENTITIES SHALL COMPLY WITH THE ACCESSIBILITY REQUIREMENTS OF SECTION 508 OF THE FEDERAL REHABILITATION ACT OF 1973**

- Requirements were updated in 2018.



## Evaluation of Management Efficiencies

*Purpose: To evaluate the quality of public services in comparison to cost.*

*Overview: As defined by OPR, the term “management efficiency,” refers to the organized provision of the highest quality public services with the lowest necessary expenditure of public funds. An efficiently managed entity (1) promotes and demonstrates implementation of continuous improvement plans and strategies for budgeting, managing costs, training and utilizing personnel and customer service and involvement, (2) has the ability to provide service over the short and long term, (3) has the resources (fiscal, manpower, equipment, adopted service or work plans) to provide adequate service, (4) meets or exceeds environmental and industry service standards, as feasible considering local conditions or circumstances, (5) and maintains adequate contingency reserves. “Management Efficiency” is generally seen as organizational efficiency including the potential for consolidation.*

*The purpose of management is to effectively carry out the principal function and purpose of an agency. Good management will ensure that the agency’s mission is accomplished and that the agency’s efforts are sustainable into the future. Unfortunately, “good management” is a relatively subjective issue, and one that is hard to quantify.*

The CSD is managed by an elected Board of Directors. The district has a long-term planning document that considers future water usage/demand based on buildout of the service area, engineering analysis of historical household usage, and records of current usage within the district. Wheeler Crest, the area served by the CSD, is a small community limited by its physical boundaries. The CSD provides water only to some areas of the community; residences in the remaining areas have individual wells. The infrastructure necessary to serve residences in the areas served by the CSD is already in place.

## Government Structure Options

*Purpose: To consider the advantages and disadvantages of various government structures to provide service.*

*Overview: Government Code §56001 declares that it is the policy of the State to encourage orderly growth and development essential to the social, fiscal, and economic well being of the State. The Code further states that “this policy should be effected by the logical formation and modification of the boundaries of local agencies, with a preference granted to accommodating additional growth within, or through the expansion of, the boundaries of those local agencies which can best accommodate and provide necessary governmental services.”*

*For local agency consolidations to occur there has to be significant (and popularly desired) cost savings or an increase in service. Wheeler Crest is isolated from the nearest water district by approximately 15 miles and in winter is often isolated by severe winter weather. These geographic constraints make it infeasible to consolidate with another water provider.*

Wheeler Crest is currently served by two special districts with overlapping service boundaries, i.e.:

Wheeler Crest Fire Protection District	Fire protection and emergency medical services
Wheeler Crest Community Service District	Water services

LAFCO law and local LAFCO policies promote the consolidation of services under the authority of one multi-purpose agency in order to alleviate government overlap and fragmentation. The WCCSD is a multi-purpose district under which local services could be consolidated. A Community Services District might



also meet overall service needs for Wheeler Crest. If further study indicated that consolidation of services in Wheeler Crest under one service provider could save money and if Wheeler Crest residents were in favor of consolidation, fire protection, water services, and other local services could be provided by one multi-purpose agency in the future.

## Determinations

- ✓ The CSD complies with the minimum requirements for open meetings and public records. The district maintains a website where the public can access overviews of the current systems, procedures, consumer confidence reports, recent correspondence, and information about recent projects.
- ✓ Per the results of the “Website Compliance Checklist” from the Golden State Risk Management Authority, there is room for improvement regarding the following elements:
  - Compliance with State Controller Reports: Specifically posting the following items:
    - (1) The Financial Transaction Report (a link to the controller’s “By The Numbers” website posted on the website);
    - (2) Compensation Report (a link to the controller’s public pay website posted in a conspicuous location on the website).
  - A separate evaluation of compliance with CA Gov Code 7405 is needed. This code section requires state governmental entities to comply with the accessibility requirements of section 508 of the Federal Rehabilitation Act of 1973.
- ✓ The district seeks to inform the community of district activities and services. Technical and fiscal data for the district are provided to all customers on an annual basis as a minimum.
- ✓ The CSD is managed by an elected Board of Directors.
- ✓ The district plans for the future based on buildout of the service area, analysis of historical household water usage, and records of current usage within the district.
- ✓ In regions of the county with separate, distinct communities that are geographically remote from each other, public services are most logically provided by a combination of several single purpose special districts.
- ✓ If further study indicated that consolidation of services in Wheeler Crest under one service provider could save money and if Wheeler Crest residents were in favor of consolidation, fire protection, water services, and other local services could be provided by one multi-purpose agency in the future.

## IV. SOI Recommendation

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In determining the SOI for each local agency, Government Code §56425 requires the Local Agency Formation Commission to consider and prepare a written statement of its determination with respect to four required findings. Each of the required findings is discussed below as it pertains to the WCCSD.

### 1. Present and Planned Land Uses

#### Discussion

The Wheeler Crest area is a small, contained area of residential development. There are currently 233 lots in the entire development, including areas outside of the district's boundaries; approximately 50 percent of the lots are developed. Mono County GIS estimates there are 236 parcels in the district, including approximately 118 developed parcels. Population data from the 2020 US Census and California Department of Finance population estimates show the population of the Wheeler Crest area to be 178 in 2020. Table 1 (above) shows the build out figures for Wheeler Crest.

#### Finding

Land use within Wheeler Crest is predominantly single-family residential. The planned land uses for the area are single-family residential uses. Development will occur within the existing developed area.

Recent changes to State law create a potential for increased density on residential parcels in Swall Meadows (up to three units: a main residence, an ADU and JADU). These changes have the potential to increase the demand for WCCSD's services.

### 2. Present and Probable Need for Public Facilities and Services

#### Discussion

Increased development throughout the district's service area was taken into consideration at the time the district's facilities were developed. Adequate water capacity and distribution systems have been provided with all new developed parcels. The buildout allowed by the General Plan will not affect the basic facilities already in existence.

#### Finding

Wheeler Crest has an existing and continuing need for public facilities and services to serve the residential development in the area.

### 3. Present Capacity of Public Facilities and Adequacy of Public Services

#### Discussion

The district provides a good level of service to its customers. As a Community Service District, the district is authorized to provide a wide array of services, including water treatment and distribution, sewage collection and disposal, road maintenance, mosquito abatement, fire protection, parks and recreational services, street lighting, police protection, and library services.

#### Finding

The district currently provides a good level of service to its customers. As a Community Service District, it is authorized to provide a variety of other services.

#### 4. Social or Economic Communities of Interest

##### Discussion

Due to the physical geography of Southwestern Mono County, residents of the Wheeler Crest area and Paradise tend to interact socially and economically with adjacent communities in Inyo County. Interaction with other communities in Mono County is limited although increasing residential development in the area may provide housing for residents who work in other Mono County communities.

##### Finding

The district area exhibits social and economic interdependence with communities in Inyo County. An interdependence with those communities has no relevance in determining the SOI for the district since special districts cannot provide services outside of their county.

#### 5. Present and Probable Need for Public Facilities and Services of Any DUCs

##### Discussion

For an update of a SOI of a 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 SOI.

##### Finding

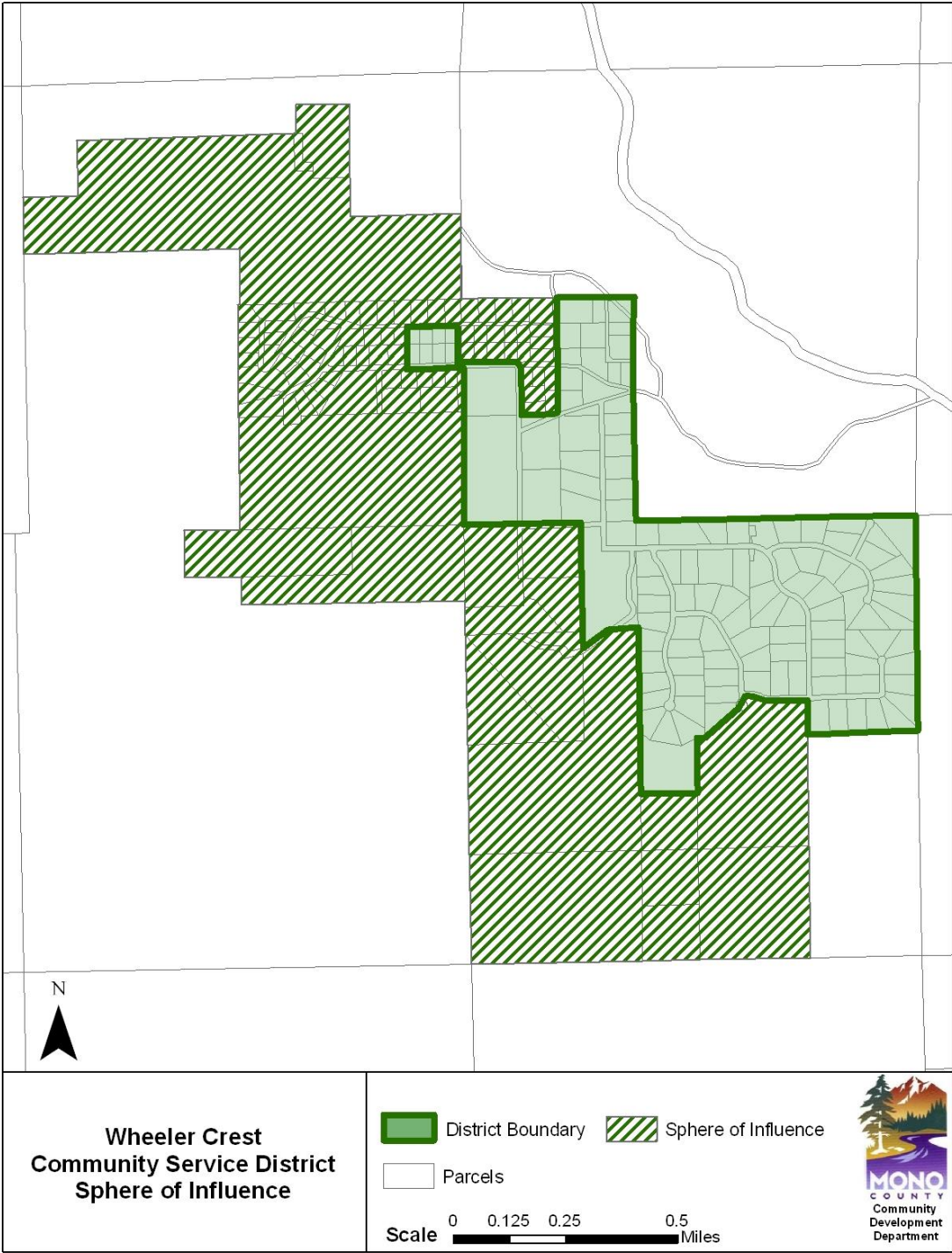
The District provides domestic water and fire flow services to Swall Meadows. However, there are no DUCs, as defined by CaLAFCO DUC Map, within or adjacent to the existing SOI.

### V. SOI Recommendation

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The SOI for the Wheeler Crest Community Service District encompasses the existing district area along with additional private lands in the Wheeler Crest community.

Figure 4 –District SOI



## VII. References

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### References Consulted

California State Controller

Special Districts Annual Report.

California State Department of Finance

*Demographic Research Unit, population and housing estimates and projections*

California Governor's Office of Planning and Research

*Cortese-Knox Act*

*Guidelines on Municipal Service Reviews*

California Local Agency Formation Commission

*CaLAFCO Statewide DUC Map using ACS 5-Year Data (2015-19) Updated March 2022.*  
<https://www.arcgis.com/apps/View/index.html?appid=4319a8066745442cbe7de6af1d13f98a>

CaLAFCO. <https://calafco.org/sites/default/files/resources/MSRGuidelines-FINAL.pdf>

California Regional Water Quality Control Board.

*Water Quality Control Plan for the Lahontan Region (Basin Plan). 1995.*

Mono County Local Agency Formation Commission

*Wheeler Crest Community Service District Sphere of Influence Report. June 1988.*

Mono County Planning Department

*Mono County General Plan. 2023.*

*Mono County General Plan, Revised Land Use Element and Land Development Regulations. 2001.*

*Mono County Housing Element. 2019-2027.*

*Mono County Master Environmental Assessment. 2009.*

U.S. Forest Service, Inyo National Forest

*Inyo National Forest Land and Resource Management Plan. 1990.*

Senate Bill 244, California Legislative Information:

[https://leginfo.ca.gov/faces/billTextClient.xhtml?bill\\_id=201120120SB244](https://leginfo.ca.gov/faces/billTextClient.xhtml?bill_id=201120120SB244)

U.S. Census. 2020 Decennial Census.

WCCSD Records

### Persons Consulted

Wheeler Crest Community Service District

Brent Miller, WCCSD

## VIII. Endnotes

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<sup>i</sup> Golden State Risk Management Authority “California Website Compliance Checklist”

<https://cdn2.hubspot.net/hubfs/4515944/website-compliance-8.5x11-single-side.pdf>

<sup>ii</sup> Golden State Risk Management Authority “California Website Compliance – SB 929” <https://gsrma.org/news-and-information/california-website-compliance-sb-929/>

DRAFT