



**LOCAL AGENCY FORMATION COMMISSION OF NAPA COUNTY**

**Political Subdivision of the State of California**

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*We Manage Government Boundaries, Evaluate Municipal Services, and Protect Agriculture*

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**MONTICELLO PUBLIC CEMETERY DISTRICT**

**MUNICIPAL SERVICE REVIEW AND SPHERE OF INFLUENCE  
UPDATE CHECKLIST**

July 2016



**Overseeing the**  
*logical formation and development*  
**of cities and special districts.**

**AGENCY PROFILE**

**OVERVIEW**

The Monticello Public Cemetery District (MPCD) was formed as an independent special district in 1936. MPCD was restructured in 1988 into a dependent special district and is now governed by the County of Napa Board of Supervisors serving as the Board of Trustees. MPCD owns and operates the Monticello Public Cemetery and provides interment services for property owners and residents within the District as well as eligible non-residents. Staffing is provided by the County Public Works Department and totals approximately one full-time employee. MPCD has a current operating budget of \$50,419 with an estimated resident service population of 1,347.

**BACKGROUND**

MPCD is located in northeast Napa County and serves the unincorporated communities of Berryessa Highlands, Berryessa Pines, and Spanish Flat. MPCD’s jurisdictional boundary is divided by Lake Berryessa and extends north and east to Lake and Yolo Counties. Land uses within the jurisdictional boundary generally comprises agricultural, open-space, and rural residential. Limited commercial and recreational land uses are also present along the southern and western shoreline of Lake Berryessa.

MPCD was formed in 1936 to assume control of the privately operated Monticello Cemetery. The cemetery was developed in 1879 and originally located in the unincorporated community of Monticello in the Berryessa Valley. The cemetery came under the control and ownership of MPCD at the petitioning of local residents after the cemetery’s private proprietors ceased operating in the early 1930s. In 1956, the United States Bureau of Reclamation relocated the cemetery to its present location in Spanish Flat as part of the “Solano Project.” Notably, the Solano Project involved the construction of the Monticello Dam, which led to the inundation of the Berryessa Valley and the creation of Lake Berryessa.

**ADOPTED BOUNDARIES**

MPCD’s jurisdictional boundary comprises approximately 140,211 acres or 219 square miles and includes 1,677 assessor parcels. A map of the District’s current jurisdictional boundary and sphere of influence is included as **Appendix A**. The Commission has approved one jurisdictional change involving MPCD since 1963. The approved change of organization involved the annexation of an approximate 293-acre portion of Berryessa Highlands in 1982.

MPCD's sphere of influence comprises approximately 165,543 unincorporated acres or 259 square miles and includes 2,437 assessor parcels. The sphere was established by the Commission in March 1985 to include MPCD's entire jurisdictional boundary along with nearly 23,000 acres of unincorporated land extending south into Wooden Valley, which includes the unincorporated community of Circle Oaks. The Commission also included in the sphere unincorporated lands to the west of MPCD that were already in the Pope Valley Cemetery District (PVCD). In adding these lands to the sphere, the Commission determined MPCD is the more appropriate service provider based on social communities of interest. In May 1985, the Commission modified MPCD's sphere to exclude an approximate 1,400-acre area already in the District's jurisdictional boundary and located along its western border after adding the same territory to PVCD's sphere. In making this change, the Commission determined the affected area would be better served by PVCD. In October 2008, the Commission updated the spheres for MPCD and PVCD to provide more consistent alignment with each of the Districts' jurisdictional boundaries. The 2008 update resulted in the Commission adding 904 acres to MPCD's sphere in the vicinity of Berryessa Estates as well as removing 1,724 acres from the District's sphere located along the eastern ridge of Pope Valley.

An approximate 490-acre portion of Berryessa Estates remains within MPCD's jurisdictional boundary but outside the District's sphere. These Berryessa Estates lands should be eventually detached from MPCD and annexed to PVCD in recognition of PVCD's established social and economic ties to the affected lands. This change would also establish a more transparent and effective method in delineating an appropriate line between MPCD and PVCD's respective service areas south of Putah Creek.

## **GROWTH AND POPULATION ESTIMATES**

There are no specific population counts within MPCD's jurisdictional boundary. However, a review of data collected by the United States Census identifies Tract 2018 generally correlates with MPCD's jurisdictional boundary with the exception of including portions of Chiles and Pope Valleys. For the purpose of this municipal service review, LAFCO assumes MPCD's jurisdictional boundary includes 75% of the total resident population in Tract 2018. LAFCO also assumes future population growth in MPCD will be consistent with the Association of Bay Area Governments projected annual growth rate in unincorporated Napa County of 0.6% over the next 20 years. It is anticipated the majority of new growth and development within MPCD's jurisdictional boundary will occur in Berryessa Highlands. Based on these assumptions, LAFCO estimates MPCD's resident service population is 1,355. The following table estimates recent and future population counts within MPCD.

Resident Service Population Estimates for MPCD  
(Estimates calculated by LAFCO)

2015	2020	2025	2030	2035
1,355	1,396	1,439	1,482	1,527

**GOVERNANCE**

MPCD operates under California Health and Safety Code Sections 9000 et seq., which is known as the Public Cemetery District Law. This law was originally enacted in 1909 and comprehensively rewritten in 2004. The law empowers MPCD to own, operate, and maintain cemeteries within its jurisdictional boundary. MPCD is authorized to provide interment services to District residents and property owners as well as eligible non-residents. Elections are based on a registered resident-voter system.

At the time of its formation in 1936, MPCD was organized as an independent special district with its own three-member Board of Trustees appointed by the County Board of Supervisors. In 1988, at the request of local residents, MPCD became a dependent special district with the Board of Supervisors appointing itself as the Board of Trustees. Regular meetings are calendared at the beginning of each year and required to occur at least once per quarter. Board meetings occur at the County of Napa’s Administration Building.

In 1989, MPCD’s Board of Trustees appointed a five-member Advisory Committee to help inform District activities and services. The Advisory Committee is responsible for reviewing and making recommendations on the annual budget, fees and charges, and capital improvements. Appointees serve staggered four-year terms and must be residents or property owners within MPCD or plot owners in the cemetery. The Advisory Committee holds an annual regular meeting on the third Wednesday in January with additional meetings scheduled as needed.

**ADMINISTRATION**

Administration of MPCD is the principal responsibility of the County Public Works Department. The Public Works Director serves as MPCD Manager and assigns staff to manage the day-to-day activities of the District. This includes monitoring the annual budget, administering burials, managing maintenance schedules, responding to public inquiries, and providing staff resources to the Advisory Committee. Public Works also provides guidance on developing and implementing policies and procedures. Accounting and legal services are provided by the Auditor-Controller’s Office and County Counsel, respectively.

**MUNICIPAL SERVICES**

MPCD owns, operates, and maintains the Monticello Public Cemetery. The cemetery is approximately 3.7 acres in size and located along Spanish Flat Loop east of its intersection with Knoxville Berryessa Road. MPCD does not provide burial services involving columbaria or mausoleums. Burial plots are offered for sale through the purchase of an “interment right” to residents and property owners within MPCD as well as eligible non-residents. MPCD’s current interment right fee for residents and property owners is \$1,050 and \$1,208 for eligible non-residents. MPCD reports there are a total of 1,089 plots in the cemetery. Of this amount, 270 plots remain available for purchase. Given the number of available plots, it appears MPCD has adequate capacity to meet future service demands within the timeframe of this review.

**FINANCIAL**

MPCD practices an annual budget process. The annual budget is prepared by the District Manager with input from the Advisory Committee and adopted by the Board of Trustees at a publicly noticed meeting. MPCD’s adopted budget for 2015-2016 includes total revenues and expenses at \$73,090 and \$108,686, respectively. The majority of MPCD’s revenues are drawn from property taxes, charges for service, and income earned on interest. All of MPCD’s expenditures relate directly to services and supplies with administration costs emerging as its largest single expense. These amounts include an intrafund transfer of \$35,000. Revenues and expenses for the previous five fiscal years are provided below.

***Operating Fund***

	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
Revenues	\$58,794	\$34,033	\$46,456	\$47,527	\$35,126
Expenses	\$50,269	\$35,694	\$39,447	\$49,686	\$28,929
Net	\$8,525	(\$1,661)	\$7,009	(\$2,159)	\$6,197

***Endowment Fund***

	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
Revenues	\$1,643	\$859	\$538	\$457	\$1,400
Expenses	\$13,000	\$0	\$10,330	\$10,000	\$0
Net	(\$11,357)	\$859	(\$9,792)	(\$9,543)	\$1,400

MPCD currently maintains a reserve balance of \$179,441. MPCD also maintains an endowment fund to address future cemetery care issues as provided under its principal act. The endowment fund currently stands at \$84,326.

***1. GROWTH AND POPULATION***

Growth and population projections for the affected area.	<b>YES</b>	<b>MAYBE</b>	<b>NO</b>
a) Is the agency's territory or surrounding area expected to experience any significant population change or development over the next 5-10 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b) Will population changes have an impact on the subject agency's service needs and demands?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c) Will projected growth require a change in the agency's service boundary?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Discussion:**

Existing and planned urban uses within MPCD are limited and primarily directed to the unincorporated communities of Berryessa Highlands, Berryessa Pines, Circle Oaks, and Spanish Flat. Any future development within MPCD will generally be limited to the remaining undeveloped lots within Berryessa Highlands. Based on ABAG estimates, an annual population growth rate for unincorporated Napa County of 0.6 percent over the next 10 years is expected. This will not impact service needs or demands and the boundary will not be affected.

**Determinations:**

1. The Monticello Public Cemetery District has an estimated resident service population of 1,355. It is expected the District will experience modest population growth over the next five years at an average annual rate of 0.6%.
2. It is expected the majority of new growth and population within the Monticello Public Cemetery District will occur in the unincorporated community of Berryessa Highlands. If developed to build-out, it is anticipated Berryessa Highlands will add another 501 residents to the District.

**2. CAPACITY AND ADEQUACY OF PUBLIC FACILITIES AND SERVICES**

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 sphere of influence.

	<b>YES</b>	<b>MAYBE</b>	<b>NO</b>
a) Are there any deficiencies in agency capacity to meet service needs of existing development within its existing territory?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b) Are there any issues regarding the agency's capacity to meet the service demand of reasonably foreseeable future growth?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c) Are there any concerns regarding public services provided by the agency being considered adequate?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d) Are there any significant infrastructure needs or deficiencies to be addressed?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
e) Are there changes in state regulations on the horizon that will require significant facility and/or infrastructure upgrades?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
f) Are there any service needs or deficiencies for disadvantaged unincorporated communities related to sewers, municipal and industrial water, and structural fire protection within or contiguous to the agency's sphere of influence?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Discussion:**

MPCD's infrastructure system is sufficient given the basic level of public interment services provided. MPCD has sufficient burial plot capacity to meet present and future service demands.

**Determinations:**

1. The Monticello Public Cemetery District's infrastructure system is sufficient given the basic level of public interment services provided.
2. The Monticello Public Cemetery District has sufficient burial plot capacity to meet present and future service demands within the timeframe of this review.

3. The Monticello Public Cemetery District has established an adequate maintenance schedule that includes regular lawn mowing and clean-up of the cemetery grounds.
4. There are no disadvantaged unincorporated communities located within or contiguous to the Monticello Public Cemetery District's sphere of influence.



**3. FINANCIAL ABILITY**

Financial ability of agencies to provide services.

	<b>YES</b>	<b>MAYBE</b>	<b>NO</b>
a) Does the organization routinely engage in budgeting practices that may indicate poor financial management, such as overspending its revenues, failing to commission independent audits, or adopting its budget late?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b) Is the organization lacking adequate reserve to protect against unexpected events or upcoming significant costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c) Is the organization's rate/fee schedule insufficient to fund an adequate level of service, and/or is the fee inconsistent with the schedules of similar service organizations?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d) Is the organization unable to fund necessary infrastructure maintenance, replacement and/or any needed expansion?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
e) Is improvement needed in the organization's financial policies to ensure its continued financial accountability and stability?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
f) Is the organization's debt at an unmanageable level?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Discussion:**

MPCD practices an annual budget process. The annual budget is prepared by the District Manager with input from the Advisory Committee and adopted by the Board of Trustees at a publicly noticed meeting. MPCD does not have financial policies but is managed by the same staff that manages the County of Napa. It is subject to an annual independent audit. Its budgets, Consolidated Annual Financial Reports, and audit reports are available online. On October 2, 2012 the MPCD Board of Trustees voted to amend the District's fee schedule. MPCD is a member of the California Association of Public Cemeteries. Reserves are adequate to protect against unexpected events or upcoming significant costs. Maintenance is performed on an as needed basis. Please refer to the Agency Profile for additional information.

**Determinations:**

1. The Monticello Public Cemetery District is dependent on its annual share of property tax revenues to fund its cemetery services. This revenue source has proven increasingly unreliable given that property tax revenues have decreased in three of the last five reported fiscal years.

**4. SHARED SERVICES AND FACILITIES**

Status of, and opportunities for, shared facilities.

	YES	MAYBE	NO
a) Is the agency currently sharing services or facilities with other organizations? If so, describe the status of such efforts.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b) Are there any opportunities for the organization to share services or facilities with neighboring or overlapping organizations that are not currently being utilized?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c) Are there any governance options that may produce economies of scale and/or improve buying power in order to reduce costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d) Are there governance options to allow appropriate facilities and/or resources to be shared, or making excess capacity available to others, and avoid construction of extra or unnecessary infrastructure or eliminate duplicative resources?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Discussion:**

MPCD does not share services or facilities but is staffed by employees of the County of Napa Public Works Department, and thus shares the County’s staff resources. Please refer to the Agency Profile for additional information.

**Determinations:**

1. The Monticello Public Cemetery District enjoys cost-savings by receiving reclaimed water from the Spanish Flat Water District.
2. The Monticello Public Cemetery District benefits from its status as a dependent special district of the County of Napa with respect to having access to resources that would otherwise be unavailable.
3. The Monticello Public Cemetery District should continue to be active in regional associations, such as the California Association of Public Cemeteries, whose annual conferences are important venues for identifying best management practices.
4. The Monticello Public Cemetery District should evaluate whether there are any shared resource opportunities with private cemeteries within its jurisdictional boundary.

**5. ACCOUNTABILITY, STRUCTURE, AND EFFICIENCIES**

Accountability for community service needs, including governmental structure and operational efficiencies.

	YES	MAYBE	NO
a) Are there any issues with meetings being accessible and well publicized? Any failures to comply with disclosure laws and the Brown Act?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b) Are there any issues with filling board vacancies and maintaining board members?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c) Are there any issues with staff turnover or operational efficiencies?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d) Is there a lack of regular audits, adopted budgets and public access to these documents?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
e) Is the agency involved in any Joint Powers Agreements/Authorities (JPAs)?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
f) Are there any recommended changes to the organization's governance structure that will increase accountability and efficiency?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
g) Are there any governance restructure options to enhance services and/or eliminate deficiencies or redundancies?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
h) Are there any opportunities to eliminate overlapping boundaries that confuse the public, cause service inefficiencies, unnecessarily increase the cost of infrastructure, exacerbate rate issues and/or undermine good planning practices?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Discussion:**

MPCD operates under the Public Cemetery District Law, which empowers MPCD to own, operate, and maintain cemeteries within its jurisdictional boundary. MPCD is authorized to provide interment services to District residents and property owners as well as eligible non-residents. Elections are based on a registered resident-voter system. MPCD is a dependent special district with the Board of Supervisors serving as the Board of Trustees. Regular meetings are calendared at the beginning of each year and are required to occur at least once per quarter. Board meetings occur at the County of Napa's Administration Building. All meetings are conducted in accordance with the Brown Act. MPCD is not involved in any JPAs and there are no governance restructure options that would enhance services. However, there is a potential opportunity to eliminate a boundary discrepancy involving 490 acres of territory located within

MPCD's jurisdictional boundary and outside the District's sphere. These lands should be eventually detached from MPCD and annexed to PVCD in recognition of PVCD's established social and economic ties to the affected lands. This change would also establish a more transparent and effective method in delineating an appropriate line between MPCD and PVCD's respective service areas south of Putah Creek. Please refer to the Agency Profile for additional information.

**Determinations:**

1. The restructuring of the Monticello Public Cemetery District into a dependent special district governed by the County of Napa Board of Supervisors has been positive and reflects the most cost-effective and efficient governance structure for the District.
2. Consolidating the Monticello Public Cemetery District with the adjacent Pope Valley Cemetery District does not appear appropriate given the sharp discrepancies in service levels and revenue sources existing between the two agencies.
3. Administration of the Monticello Public Cemetery District is provided by the County of Napa Public Works Department and helps to ensure a sufficient level of expertise is employed in the management of the District.
4. The Monticello Public Cemetery District serves an important role in providing for the respectful and cost-effective interment of human remains for property owners, residents, and eligible non-residents of the District.
5. The Monticello Public Cemetery District's Advisory Committee enhances community participation in District activities and helps to ensure service levels are consistent and accountable with the preferences of the constituents.

**6. OTHER ISSUES**

Any other matter related to effective or efficient service delivery, as required by commission policy.

	YES	MAYBE	NO
a) Are there any other service delivery issues that can be resolved by the MSR/SOI process?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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**Discussion:**

No other issues have been identified that can be resolved by the MSR/SOI process.

**SPHERE OF INFLUENCE STUDY**

It is recommended that the Commission affirm MPCD's existing sphere. Pursuant to Government Code Section 56425(e), the following statements have been prepared in support of the recommendation:

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

The present and planned land uses in the sphere are contemplated under the County General Plan. The County General Plan and supporting zoning ordinances help ensure the majority of land within the sphere will remain rural and support agricultural and open-space uses. Existing and planned urban uses are limited and primarily directed to the unincorporated communities of Berryessa Highlands, Berryessa Pines, Circle Oaks, and Spanish Flat. These present and planned land uses are compatible and supported by the Monticello Public Cemetery District's public interment services.

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

The Monticello Public Cemetery District serves an important role in addressing the present and probable need for the respectful and cost-efficient interment of human remains for property owners and residents within the sphere.

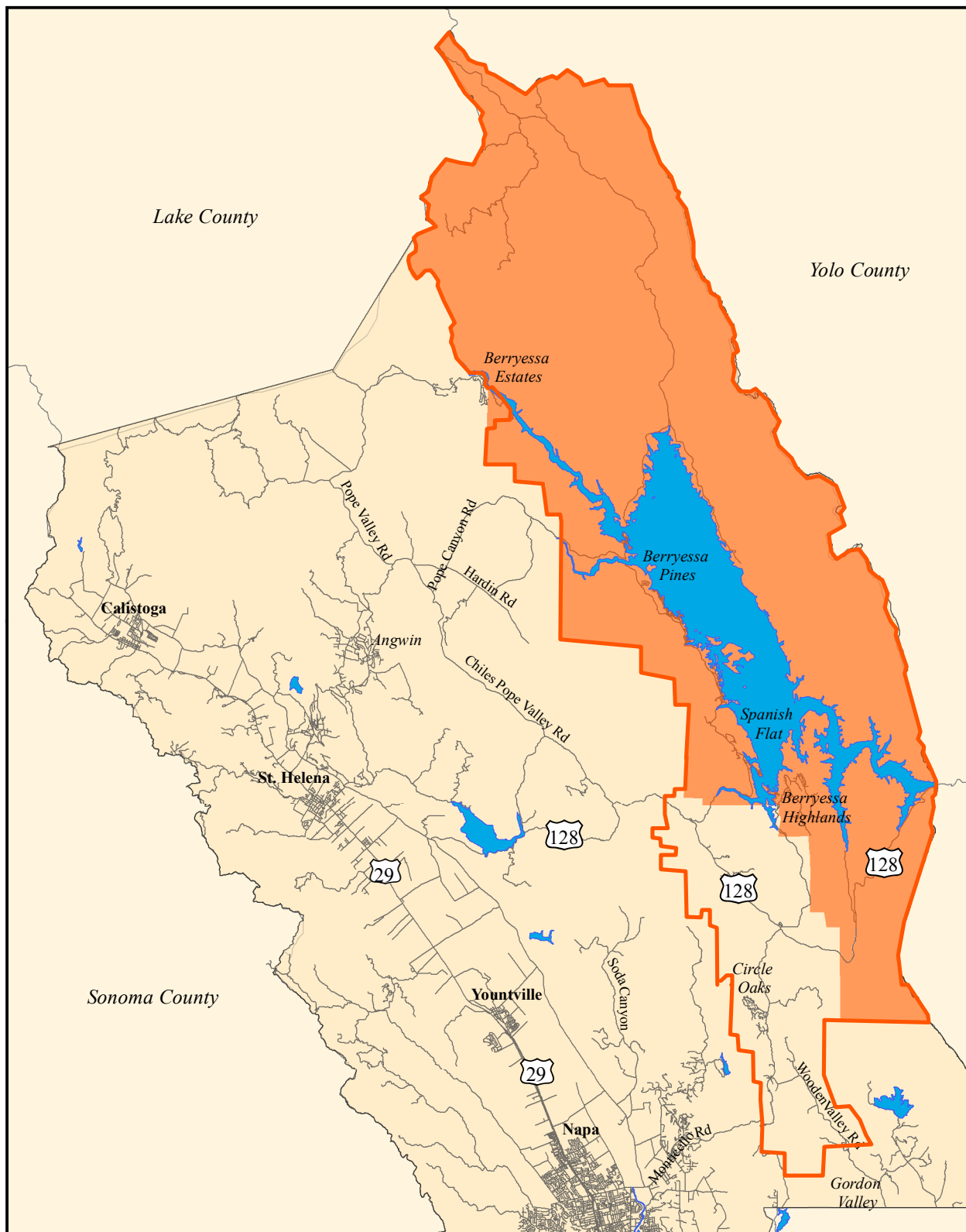
**3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.**

The Monticello Public Cemetery District has established sufficient infrastructure capacities, administrative controls, and funding streams to indicate it is capable of providing an appropriate level of public interment services within the sphere.



**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 Monticello Public Cemetery District has established distinct social and economic interdependencies within the sphere. The sphere facilitates the orderly development of the District in a manner that advantageously provides for the present and future needs of the community.

# Monticello Public Cemetery District





**Legend**

-  Monticello Public Cemetery District Jurisdictional Boundary
-  Monticello Public Cemetery District Sphere of Influence



0 1 2 4 Miles

April 2016  
Prepared by BF



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