

**SAN LUIS OBISPO LAFCO**  
**Local Agency Formation Commission**

**Proposal Application**

The California Government Code requires the Commission to review specific factors in its consideration of this proposal. Please complete this form to facilitate our review.

Please provide the names and addresses of the Applicant's Agent or and/or other persons to whom copies of the Agenda, Executive Officer's report and any required notice or hearing is to be furnished.

**Applicant/Agents**

<b>Name</b>	<b>Address</b>	<b>Telephone No.</b>
APPLICANT: Santa Margarita Ranch, LLC Rob Rossi	750 Pismo Street San Luis Obispo, CA 93401	(805) 543-4333 rob@rossi-ent.com
APPLICANT: Santa Margarita Ranch, LLC Doug Filippini	22720 El Camino Real Santa Margarita, CA 93453	(805) 610-3381 doug@apwinery.com
APPLICANT: Santa Margarita Ranch, LLC Karl Wittstrom	22720 El Camino Real Santa Margarita, CA 93453	(805) 459-6603 karl@apwinery.com
AGENT: Kirk Consulting Jamie Jones	8830 Morro Road Atascadero, CA 93422	(805) 461-5765 jamie@kirk-consulting.net

**Interested Parties**

<b>Name</b>	<b>Address</b>	<b>Telephone No.</b>
Kirk Consulting Christy Gabler	8830 Morro Road Atascadero, CA 93422	(805) 461-5765 christy@kirk-consulting.net
Wallace Group Rob Miller	612 Clarion Court San Luis Obispo, CA 93401	(805) 544-4011 RobM@wallacegroup.us
North Coast Engineering John Luttman	725 Creston Road, Suite C Paso Robles, CA 93446	(805) 239-3127 johnl@northcoastengineering.com

**E-mail Addresses**


**Proposal Type:**

- |   |   |   |
|---|---|---|
| <input checked="" type="checkbox"/> ANNEXATION          | <input type="checkbox"/> OUTSIDE USER AGREEMENT     | <input type="checkbox"/> SPECIAL STUDY          |
| <input checked="" type="checkbox"/> SPHERE OF INFLUENCE | <input type="checkbox"/> SPECIAL DISTRICT FORMATION | <input type="checkbox"/> INCORPORATION OF CITY  |
| <input type="checkbox"/> DISSOLUTION                    | <input type="checkbox"/> MERGERS                    | <input type="checkbox"/> ACTIVATE OR ADD POWERS |
| <input type="checkbox"/> CONSOLIDATIONS                 | <input type="checkbox"/> REORGANIZATIONS            | <input type="checkbox"/> DETACHMENT             |

## General Information

Name & type of Proposal: CSA 23 Sphere of Influence Update +

(e.g., name, type, jurisdiction)

Vineyard Oaks at Santa Margarita (Tract 2586) Water System Annexation to CSA 23

1. This Application was initiated by:

☒ Petition ☐ Resolution of Application

2. Does the application include 100% written consent of each property owner in the affected territory?

☒ Yes ☐ No

3. State reason(s) for requesting the proposed action: Consistent with Vested Tentative Tract 2586 Condition of Approval 1.f., the subject tract is required to annex to CSA 23 to accommodate the expanded community water system to serve the tract.

4. State location of affected territory: The annexation area, which includes the 111 residential parcels created by the 3-Phase Tract 2586, is located southeast of the town of Santa Margarita and the CSA 23 Service Area and south of SR58/Pozo Road.

5. Is the affected territory inhabited or uninhabited (less than 12 registered voters)?

☐ Inhabited ☒ Uninhabited

6. Do the boundaries of the district or city overlap or conflict with the boundaries of the proposed annexation?

☐ Yes ☒ No

If yes, justify the need for overlapping or conflicting boundaries: \_\_\_\_\_

7. Do the boundaries of the territory split lines of assessment?

☐ Yes ☒ No

8. Do the boundaries of the territory proposed create an island or corridor of unincorporated territory or a strip?

☒ Yes ☐ No

If yes, justify the necessity for the boundaries as proposed: The strip of land between the annexed boundary and the existing boundary is part of an unsurveyed remainder parcel and large agricultural parcel to be encumbered with an agricultural easement.

9. If the proposed boundary follows a street or highway does it include the entire street or highway?

☐ Yes ☒ No

10. List the cities or district(s) that will be affected by this proposal: \_\_\_\_\_

County Supervisor District 5, County Service Area 23

#### **Land Use Information**

11. Total acreage: Phase 1: Lots 1 - 38, for initial annexation (44 acres); Future Phase 2: 44 residential lots (54 acres); Future Phase 3: 29 residential lots (36 acres)  
APN #s \_\_\_\_\_ (APN's available following phased Final Tract Map recordation)

12. Indicate the zoning. County and City rezoning of the site:

County: Agriculture; Proposed Tract 2586 is an Agricultural Residential Cluster Subdivision,  
which maintains agricultural land under Agricultural Open Space Easement

13. Describe any special land use concerns found in General Plans: \_\_\_\_\_

Flood Hazard Area, Geologic Hazard Area, Sensitive Resource Area

14. Describe the existing land use: cattle grazing

15. What is the proposed land use? Proposed Tract 2586 is an Agricultural Residential Cluster Subdivision, which maintains surrounding agricultural land under Agricultural Open Space Easement

16. Has the affected territory been rezoned? ☒ Yes ☐ No

Date: December 23, 2008 (Please attach ordinance)

If yes, what is the rezoning use and densities (if applicable) permitted? \_\_\_\_\_

Tentative Tract 2586 and CUP S030115U grant approval for an agricultural cluster subdivision to create 111 new residential parcels in three (3) phases

17. Describe the specific development potential of the property: \_\_\_\_\_

The proposed development will build out the allowed 111 residential parcels, in three (3) development phases, with associated roadway and utility infrastructure to serve each.

18. Has a Land use Permit, Conditional Use Permit, Tract Map, or Specific Plan or other land use approval been given for the property(ies)?

☒ Yes      ☐ No      If yes, please attach a copy of the approval.

### **Environmental Information**

(Please submit any environmental studies that have been completed.)

19. Has an environmental determination (Negative Declaration-Environmental Impact Report) been certified by a legislative body?

☒ Yes      ☐ No      SCH# 2004111112

If yes, please attach a copy.

20. Is the site presently zoned for or engaged in agricultural use?

☒ Yes      ☐ No      If yes, please explain: cattle grazing

Prime agricultural land:

☐ Yes      ☒ No, not in the area proposed for residential development

21. Will extension of services requested for this proposal induce growth on affected property?

☒ Yes      ☐ No

On adjacent properties? ☐ Yes      ☒ No

Unincorporated? ☐ Yes      ☒ No

Both? ☐ Yes      ☒ No

22. Will the proposal require public services from any agency or facility that is currently operating at or near capacity, i.e. sewer, water, police or fire?

☐ Yes ☒ No

If yes, please explain: The 2017 CSA 23 Sphere Update review stated that the community relies on groundwater, an unreliable source in drought conditions. Obtaining Nacimiento Water in cooperation with the development of this Tract was recommended and has been accomplished. A Nacimiento Water turnout has been constructed and will be delivered and land-applied to offset the future build-out use anticipated for Tract 2586.

23. Please describe the environmental setting of the site: The property consists of varied terrain with oak woodland covered hillsides, native grasslands, and ephemeral drainages throughout. Planted vineyard blocks surround the area to be annexed on both the west and south sides. Archaeological evidence suggests the site was once occupied by both Salinans and Chumash.

24. Terrain: Level to gently rolling (0-10%) ☒

Slopes (10-30%) ☒

Steep slopes (over 30%) ☒

25. Hydrology (streams, lakes, or marshes on site)? ☒ Yes ☐ No

If yes, please describe: tributary to Trout Creek (Tostada Creek) located on-site, located parallel to an existing ranch road which will be improved to serve the Tract, headwaters are located in the Santa Lucia Mountains to the west + Yerba Buena Creek, located southwest of the proposed annexation area

26. Vegetation:

Has the natural vegetation already removed or altered?

☒ Yes ☐ No

27. Are there any endangered plant species on site? ☐ Yes ☒ No

28. Have any endangered or threatened species been identified?

☒ Yes ☐ No

If yes, please explain: San Luis Obispo Mariposa Lily, San Luis Obispo County morning glory, Vernal Pool Fairy Shrimp, South/Central California Coast Steelhead, California red-legged frog

**TO:**

Local Agency Formation Commission  
County of San Luis Obispo  
1042 Pacific Street, Suite A  
San Luis Obispo, CA 93401

To be filled in by LAFCO

File No: \_\_\_\_\_

Date Presented: \_\_\_\_\_

Officially Filed: \_\_\_\_\_

Designated as: \_\_\_\_\_

LAFCO Action: \_\_\_\_\_

Date: \_\_\_\_\_

**PETITION FOR**

Vineyard Oaks at Santa Margarita (Tract 2586) Water System Annexation to CSA 23  
(Name of Proposal)

The undersigned by their signature hereon DO HEREBY REPRESENT REQUEST AND PETITION as follows:

1. The proposal is made pursuant to Part 3, Division 3, Title 5 of the California Government Code (commencing with section 56000, Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000).
2. The nature of the proposed change of organization (i.e., annexation, detachment, Reorganization, etc.) is/are:  
annexation of approx 134 acres in three (3) phases (1: 38 residential parcels, 2: 44 residential parcels, 3: 29 residential parcels), totaling 111 residential parcels to be created with the three-phase recordation of Tract 2586 for water services offered by CSA 23 and augmented/enhanced by the new infrastructure provided by Tract 2586
3. The name or names of all districts and/or cities for which any such change or organization is proposed is as follows:  
County Service Area 23, San Luis Obispo County  
\_\_\_\_\_
4. The names of all other affected counties, cities and districts are:  
San Luis Obispo County  
\_\_\_\_\_
5. The territory(ies) proposed for annexation to County Service Area 23  
is/are: currently uninhabited  
(uninhabited (less than 12 people) or inhabited (12 or more people))
6. This proposal is ~~(is not)~~ within the sphere of influence of the affected city and/or district.  
(Circle one)

7. Complete description of the exterior boundaries of the territory proposed for annexation. **Please attach legal description to this petition.**
8. Do the boundaries of the districts or cities listed above overlap or conflict with the boundaries of the proposed annexation? ☐ Yes ☒ No

If yes, justify the need for overlapping or conflicting boundaries:

---

---

9. List any of the districts or cities, as above-listed, which possess authority to perform the same or similar function as requested herein.

San Luis Obispo County currently operates/manages CSA 23 and it is the State's preference that water systems are expanded/combined rather than creating new, private, water systems, where that expansion is feasible.

10. Do the boundaries of the territory proposed split lines of assessment?  
☐ Yes ☒ No, following recordation of the Final Tract Map

11. Do the boundaries of the territory proposed create an island or corridor of unincorporated territory or a strip? ☒ Yes ☐ No

If yes, justify the necessity for the island corridor or strip:

The annexed residential parcels will be surrounded by an agricultural conservation easement. Additionally, the strip of land between agricultural "Lot 39" and the existing CSA 23 boundary is a part of an unsurveyed remainder associated with Tract 2586. New Tract 2586/CSA 23 water system infrastructure will include a 6-inch cross-connect water line in Encina Avenue between Encina/K street and the Tract 2586 Booster Station. An easement will be recorded along Encina Ave, across the remainder parcel.

12. If the proposed boundary follows a street or highway, does it follow the center of the street or highway? ☐ Yes ☒ No

13. It is desired that this proposal provide for and be made subject to the following terms and conditions:

Refer to:

- CUP S030115U/Tract 2586 Findings, Condition 1.f. regarding requirement to annex the project to CSA 23 and the requirement to offset (1:1) use of water for residential parcels with Nacimiento Water. Note, the Nacimiento turn-out was completed by the SMR Mutual Water Company in 2016 and will be operational to receive Nacimiento water beginning in 2021.
- Vineyard Oaks (Tract 2586) Agricultural Residential Cluster Subdivision project description

14. The reasons for this proposal are:

- A. Consistent with the December 23, 2006 approval of the subject project and establishment of the corresponding conditions of approval, Tract 2586 is required to annex to CSA 23. (see CUP/Tract condition 1.f.)
- B. Where in close proximity to and existing water purveyor, it is the State's preference to expand the existing system to serve the new use(s). In this case, the proposed Tract infrastructure will provide supply and storage redundancy to the existing CSA 23 system.

15. The persons signing this petition have signed as \_\_\_\_\_ registered voters **OR** ☒ owners of land.

\_\_\_\_ Items 16, 17, 18, and 19 are not applicable to this Petition. \_\_\_\_\_

16. If the formation of a new district is included in the proposal:

- A. The principal act(s) under which said district(s) is/are proposed to be formed is/are: \_\_\_\_\_
- B. The proposed name(s) of the new district(s) is/are: \_\_\_\_\_
- C. The boundaries of the proposed new district(s) are as described in Exhibit(s) \_\_\_\_\_, \_\_\_\_\_, heretofore incorporated herein.

17. If an incorporation or formation of a district is in the proposal:

- A. The proposed name of the new city/district is: \_\_\_\_\_
- B. Provisions are requested for appointment of:
  - i. City/District Manager \_\_\_\_\_ Yes \_\_\_\_\_ No
  - ii City Clerk & City Treasurer \_\_\_\_\_ Yes \_\_\_\_\_ No  
(City only)
- C. Number of members proposed for initial Board of Directors/City Council, pursuant to Chapter Three commencing with §61120. (Please check one, below.)  
\_\_\_\_\_ 3 (Three) \_\_\_\_\_ 5 (Five)

18. If the proposal includes the consolidation of special districts, the proposed name of the consolidated district(s) is/are: \_\_\_\_\_

19. How will the new district be financed?

\_\_\_\_\_  
\_\_\_\_\_



20. Proponents of this proposal: (Names of Chief Petitioners, not to exceed three (3), who hereby request that proceedings be taken in accordance with the provisions of Section 56000, et. seq. of the Government Code and herewith affix signatures) as follows:

Santa Margarita Ranch LLC

Mailing Address

By: Major Domo LLC

Major Domo LLC:

By:   
Karl Wittstrom, Manager

22720 El Camino Real  
Santa Margarita, CA 93453

By: \_\_\_\_\_  
Douglas C. Filipponi, Manager

By: Pacific Improvements LLC

Pacific Improvements LLC:

By: \_\_\_\_\_  
Rob Rossi, Managing Member

750 Pismo Street  
San Luis Obispo, CA 93401

20. Proponents of this proposal: (Names of Chief Petitioners, not to exceed three (3), who hereby request that proceedings be taken in accordance with the provisions of Section 56000, et. seq. of the Government Code and herewith affix signatures) as follows:

Santa Margarita Ranch LLC

Mailing Address

By: Major Domo LLC

Major Domo LLC:

By: \_\_\_\_\_  
Karl Wittstrom, Manager

22720 El Camino Real  
Santa Margarita, CA 93453

By:  \_\_\_\_\_  
Douglas C. Filipponi, Manager

By: Pacific Improvements LLC

Pacific Improvements LLC:

By: \_\_\_\_\_  
Rob Rossi, Managing Member

750 Pismo Street  
San Luis Obispo, CA 93401

20. Proponents of this proposal: (Names of Chief Petitioners, not to exceed three (3), who hereby request that proceedings be taken in accordance with the provisions of Section 56000, et. seq. of the Government Code and herewith affix signatures) as follows:

Santa Margarita Ranch LLC

Mailing Address

By: Major Domo LLC

Major Domo LLC:

By: \_\_\_\_\_  
Karl Wittstrom, Manager

22720 El Camino Real  
Santa Margarita, CA 93453

By: \_\_\_\_\_  
Douglas C. Filipponi, Manager

By: Pacific Improvements LLC

Pacific Improvements LLC:

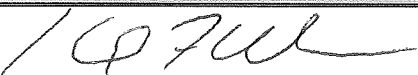
By:  \_\_\_\_\_ 12/17/2020  
Rob Rossi, Managing Member

750 Pismo Street  
San Luis Obispo, CA 93401

The circulation of this petition has been waived due to ownership of all parcels to be annexed by the same entity as the proponents listed.

As a signer of this Petition, I hereby certify that I have read the content of the Petition and request that proceedings be taken for the proposal as provided by said Petition.


**PLEASE SIGN NAME ON THE TOP LINE**  
**PRINT NAME ON THE SECOND LINE**

Date signed	Signature & printed name of Petitioners	Address of Petitioners	Official Use Only
Santa Margarita Ranch LLC			
12/16/2020			
	By: Karl Wittstrom, Manager Major Domo LLC	22720 El Camino Real Santa Margarita, CA 93453	
	By: Douglas C. Filipponi, Manager Major Domo LLC	22720 El Camino Real Santa Margarita, CA 93453	
	By: Rob Rossi, Managing Member Pacific Improvements LLC	750 Pismo Street San Luis Obispo, CA 93401	

The circulation of this petition has been waived due to ownership of all parcels to be annexed by the same entity as the proponents listed.

As a signer of this Petition, I hereby certify that I have read the content of the Petition and request that proceedings be taken for the proposal as provided by said Petition.

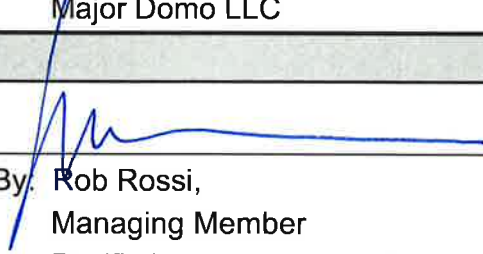
**PLEASE SIGN NAME ON THE TOP LINE**  
**PRINT NAME ON THE SECOND LINE**

Date signed	Signature & printed name of Petitioners	Address of Petitioners	Official Use Only
Santa Margarita Ranch LLC			
	By: Karl Wittstrom, Manager Major Domo LLC	22720 El Camino Real Santa Margarita, CA 93453	
12/16/2020	 By: Douglas C. Filipponi, Manager Major Domo LLC	22720 El Camino Real Santa Margarita, CA 93453	
	By: Rob Rossi, Managing Member Pacific Improvements LLC	750 Pismo Street San Luis Obispo, CA 93401	

The circulation of this petition has been waived due to ownership of all parcels to be annexed by the same entity as the proponents listed.

As a signer of this Petition, I hereby certify that I have read the content of the Petition and request that proceedings be taken for the proposal as provided by said Petition.

**PLEASE SIGN NAME ON THE TOP LINE**  
**PRINT NAME ON THE SECOND LINE**

Date signed	Signature & printed name of Petitioners	Address of Petitioners	Official Use Only
Santa Margarita Ranch LLC			
	By: Karl Wittstrom, Manager Major Domo LLC	22720 El Camino Real Santa Margarita, CA 93453	
	By: Douglas C. Filipponi, Manager Major Domo LLC	22720 El Camino Real Santa Margarita, CA 93453	
12/17/2020	 By: Rob Rossi, Managing Member Pacific Improvements LLC	750 Pismo Street San Luis Obispo, CA 93401	