



**REVISION**

**DECEMBER 18, 2015**

**BOARD AGENDA**

**ITEM 8.4 CUSTOMER RELATIONS UPDATE**

**New Connections changed from:**

Year to date connections have increased by **15045** meters – 25% of the projected number of new connections for FY2016.

**To:**

Year to date connections have increased by **150** meters – 25% of the projected number of new connections for FY2016.

# Santa Margarita Water District



## MEMORANDUM

**TO:** Board of Directors

**DATE:** December 18, 2015

**FROM:** Beth Geldert

**SUBJECT:** Customer Relations Update

### **Call Activity:**

Call activity decreased 14% from October 2015 and decreased 8% from the same period last year. Decrease is due to two scheduled holidays in November 2015.

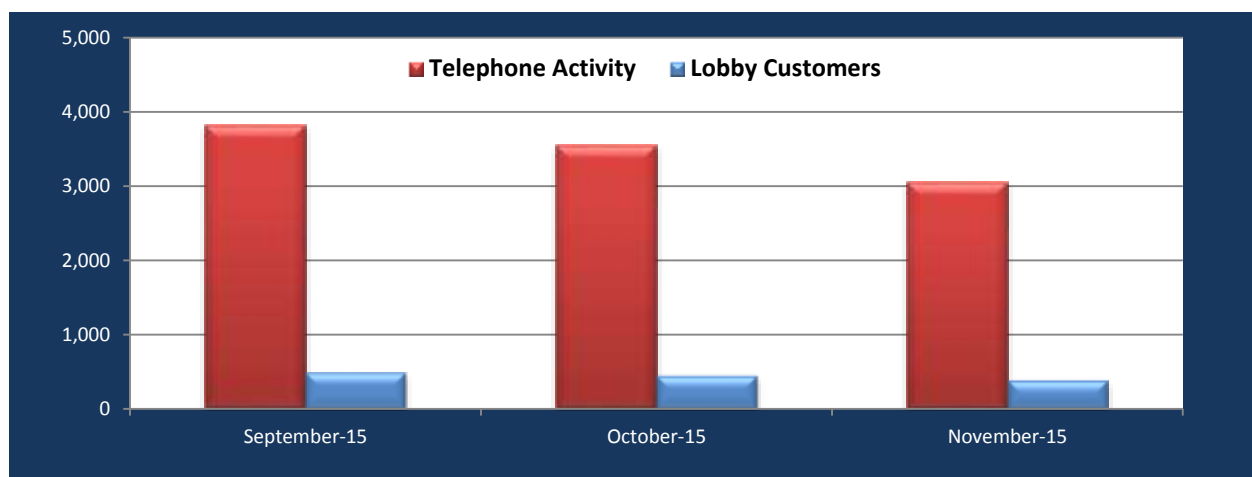
### **Non-Pay Disconnections and Late Fee Penalties:**

Customer Relations processed 68 shutoff accounts in November, resulting in a 38% decrease from the prior month, October 2015.

### **New Connections:**

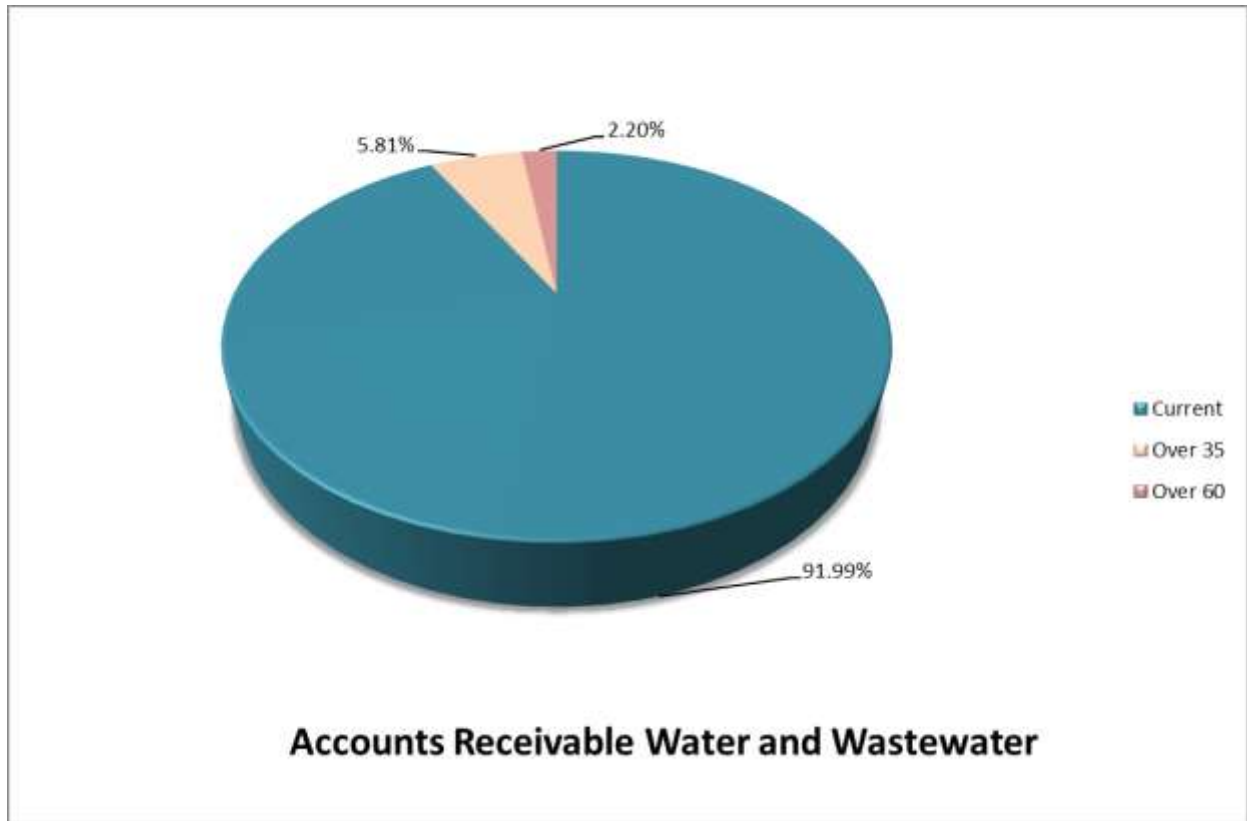
There was an increase from October to November 2015 of 5 connections (5 dwelling units). The new connections were installed in the new planning area – Esencia.

Year to date connections have increased by 150 meters – 25% of the projected number of new connections for FY2016.



**Santa Margarita Water District**  
**Customer Relations Activity as of November 2015**  
 Accounts Receivable – Water, Wastewater and Recycled Water

<b>Water &amp; Wastewater</b>				
	Balance	Percent of Total \$	# of Customer Accounts	Percent of Accounts
Current	\$ 2,604,517	91.99%	42,877	77.33%
Over 35	164,614	5.81%	7,921	14.29%
Over 60	62,424	2.20%	4,644	8.38%
<b>Subtotal</b>	<b>\$ 2,831,555</b>	<b>100.00%</b>	<b>55,442</b>	<b>100.00%</b>
Annual Water & Wastewater Sales Accrual	2,496,940			
<b>Total Accounts Receivable</b>	<b>\$ 5,328,495</b>			



The Water, Wastewater and Recycled Water Accounts Receivable (AR) aging has seasonal fluctuations due to the increase/decrease in consumption.

## District Call Activity

CALL ACTIVITY													
MONTH	BALANCE INQUIRY	DELINQUENCY INQUIRY	DROUGHT INQUIRY	EMERGENCY CALL OUT	HIGH CONSUMPTION	INQUIRY REGARDING POSSIBLE LEAK	REBATES	RATES	TELEPHONE PAYMENTS	TURN ON/OFF SERVICE	WATERSMART	OTHER	TOTAL
Nov-15	865	181	38	13	57	57	74	4	451	532	67	720	3,059
Oct-15	1,113	185	54	23	42	67	72	2	496	646	74	775	3,549
Sep-15	1,174	214	75	30	43	70	84	3	502	689	169	765	3,818
Aug-15	1,117	229	96	24	63	75	100	5	635	857	208	946	4,355
Jul-15	1,016	210	149	12	68	72	169	11	796	889	136	573	4,101
Jun-15	867	188	355	13	25	27		10	1,223	976		1,092	4,776
May-15	651	141	172	11	62	49		45	1,205	794		1,138	4,268
Apr-15	635	185	119	11	56	41		20	1,118	776		1,247	4,208
Mar-15	654	173	15	11	37	38		6	1,176	724		584	3,418
Feb-15	718	171	6	6	25	48		11	1,048	491		515	3,039
Jan-15	919	213	5	11	41	40		8	1,132	537		540	3,446
Dec-14	930	137	3	9	40	21			1,096	611		746	3,593
Nov-14	832	114	35	17	53	23			927	553		786	3,340

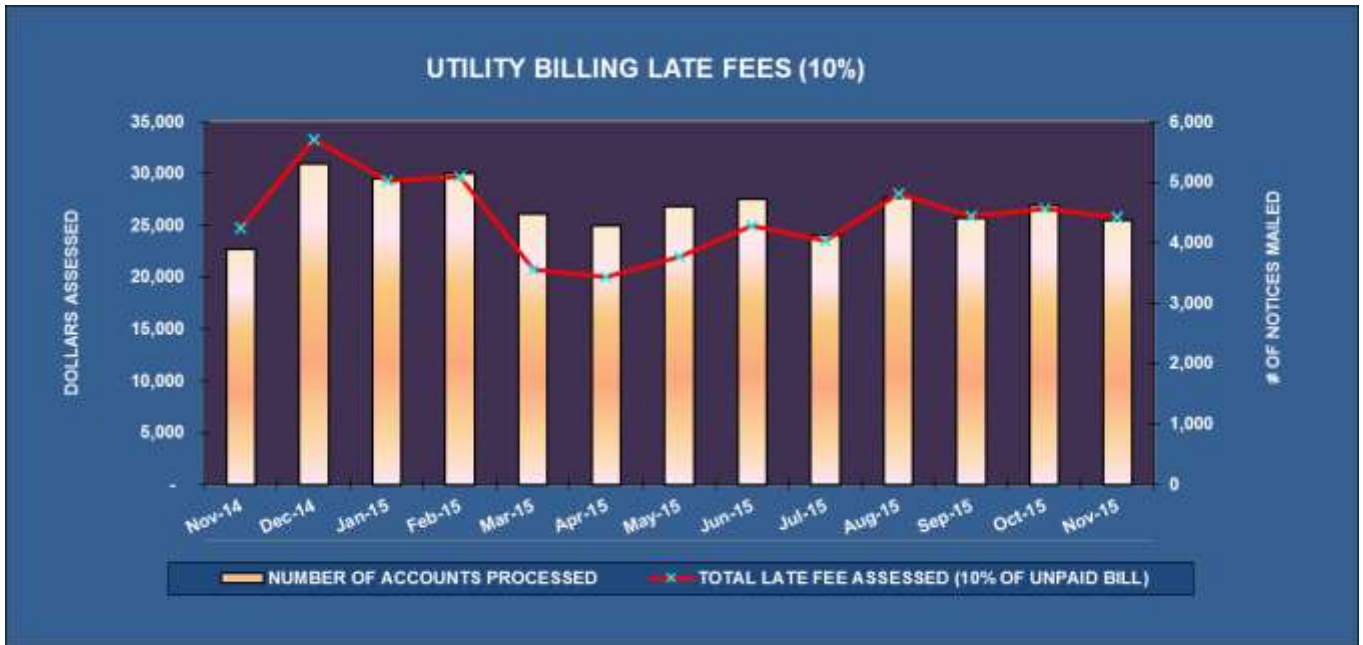
- Updated categories July 2015
- Began tracking “DROUGHT INQUIRY” inquiries August 2014
- Began tracking “RATES” inquiries January 2015
- Began tracking “REBATES and WATERSMART” inquiries July 2015

## Customer Activity

Accounts with a delinquent balance over \$50.00 and approximately 55 days past due will be disconnected.

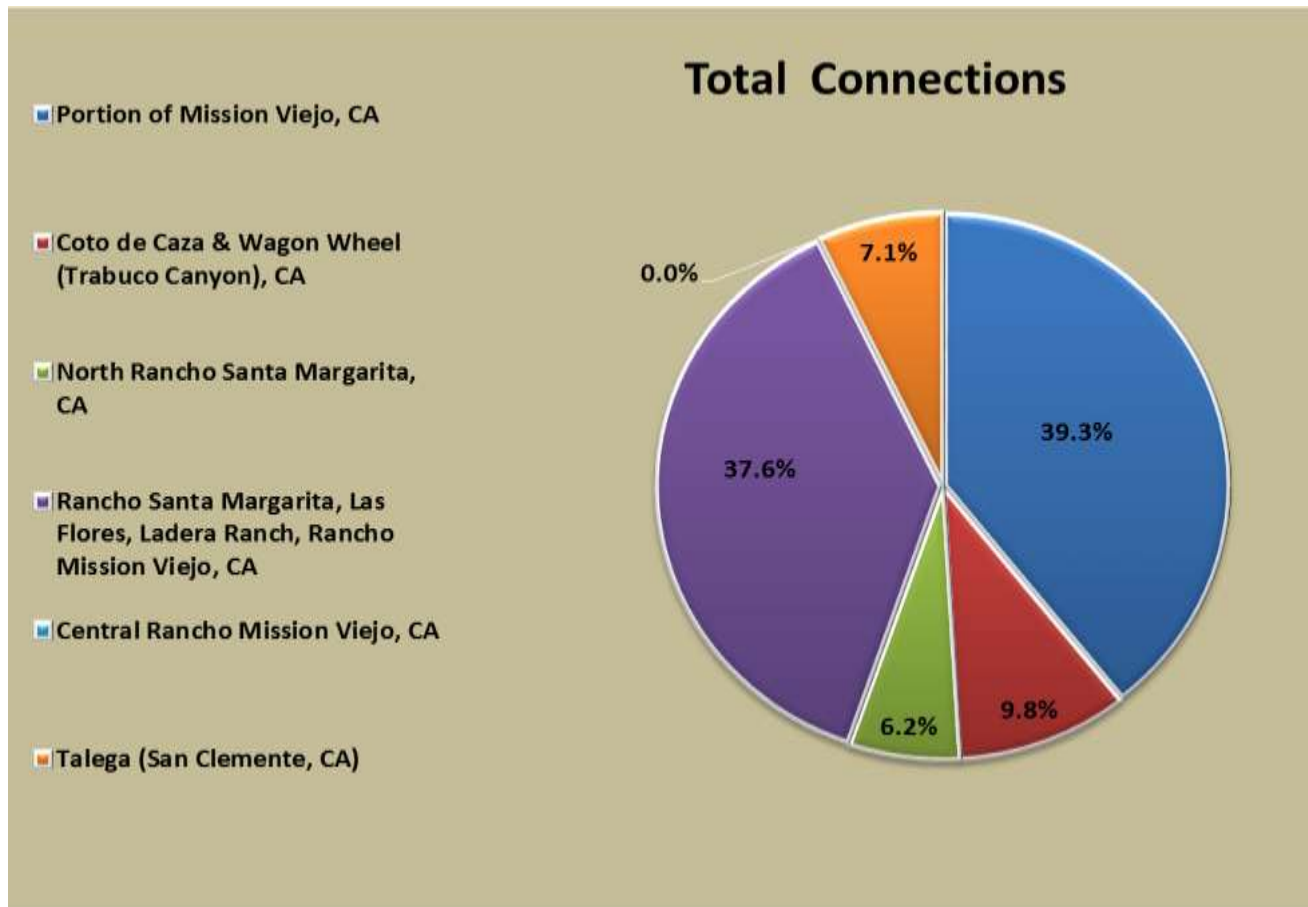


The decrease in November 2015 shutoff activity is a result of the Thanksgiving Holiday week and no shutoff processing scheduled for that week.



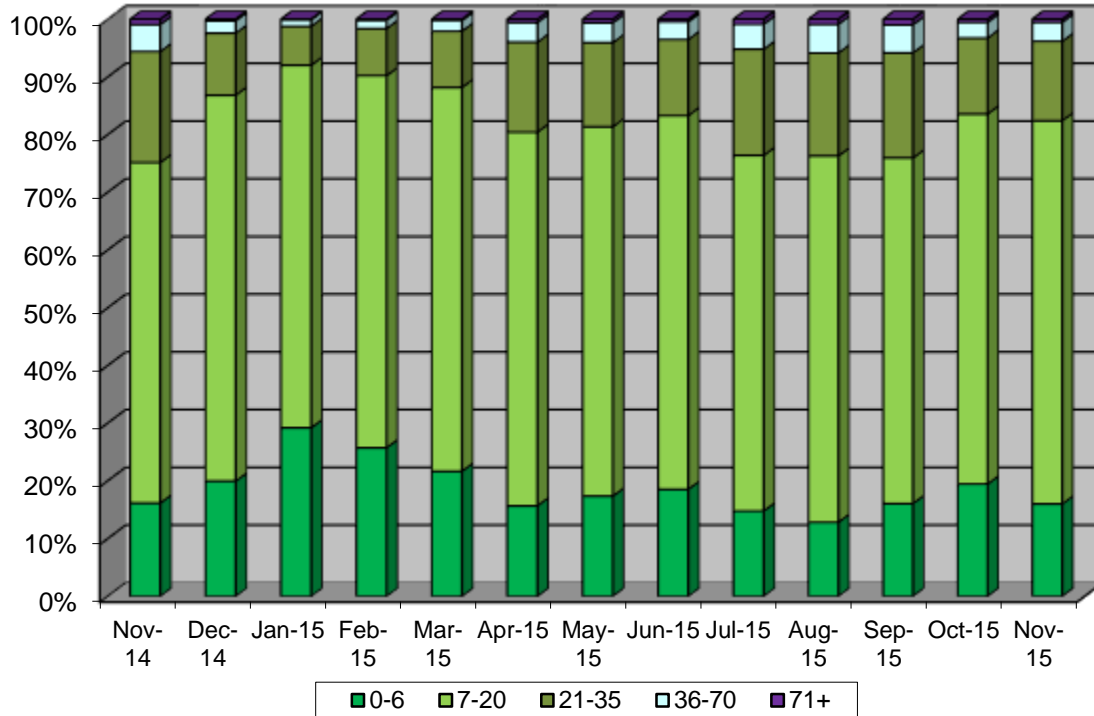
## Connection Activity

CONNECTION SUMMARY BY IMPROVEMENT DISTRICT (as of Nov 2015)							
CUSTOMER CLASS	ID1	ID2	ID3	ID4	ID6	ID7	Grand Total
	Portion of Mission Viejo, CA	Coto de Caza & Wagon Wheel (Trabuco Canyon), CA	North Rancho Santa Margarita, CA	Rancho Santa Margarita, Las Flores, Ladera Ranch, Rancho Mission Viejo, CA	Central Rancho Mission Viejo, CA	Talega (San Clemente, CA)	
COMMERCIAL	485	33	131	1,260	3	263	2,175
LAKEFILL	1			1			2
IRRIGATION	927	360	151	1,113		279	2,830
RESIDENTIAL	20,050	4,943	3,112	18,189		3,338	49,632
<b>Grand Total Connections</b>	<b>21,463</b>	<b>5,336</b>	<b>3,394</b>	<b>20,563</b>	<b>3</b>	<b>3,880</b>	<b>54,639</b>
Grand Total Residential Dwelling Units	21,125	4,952	3,624	21,770		3,840	55,311
Grand Total Dwelling Units and other connections	22,538	5,345	3,906	24,144	3	4,382	60,318
Percentage of Connections to Total Connections	39.3%	9.8%	6.2%	37.6%	0.01%	7.1%	100%



## Consumption Activity

### RESIDENTIAL SINGLE FAMILY TIER USAGE



### CONSUMPTION YTD FY 2016

■ Portion of Mission Viejo, CA

■ Coto de Caza & Wagon Wheel (Trabuco Canyon), CA

■ North Rancho Santa Margarita, CA

■ Central Rancho Mission Viejo

■ Talega (San Clemente, CA)

■ Rancho Santa Margarita, Las Flores, Ladera Ranch, Rancho Mission Viejo, CA

