TERREBONNE
SANITARY DISTRICT

District Management Plan

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March 2026

Prepared by

Parametrix

Terrebonne Sanitary District

District Management Plan

Prepared for

Terrebonne Sanitary District
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March 2026 | 297-9398-001

Citation

Parametrix. 2026. District Management Plan. Prepared for Terrebonne Sanitary District by Parametrix, Bend, Oregon. March 2026.

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Acronyms and Abbreviations (continued)
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Acronyms and Abbreviations

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Acronyms and Abbreviations (continued)

1. Purpose and Authority

1.1 Establishment of the District

The Terrebonne Sanitary District (District) exists to provide sanitary sewer service within the District boundary in order to protect public health, reduce groundwater and environmental risks associated with failing or inadequate onsite wastewater systems, and establish a long-term public wastewater utility for the Terrebonne community.

The District was formed to create a public entity capable of financing, owning, administering, and overseeing a community wastewater collection system for Terrebonne. The District's purpose includes serving existing development within its service area, supporting orderly future expansion where appropriate, and providing the governance and utility structure necessary for long-term system ownership and management.

The District was established as a non-taxing district, with utility operations and obligations to be supported through user rates, fees, charges, system development charges, and other lawful revenue sources rather than through ad valorem property taxation (Appendix A; Appendix C).

1.2 District Mission

Support public health and environmental protection by providing reliable, safe, and efficient wastewater service within the District boundaries.

1.3 District service and system role

The District's wastewater infrastructure includes a STEP collection system serving properties within the Terrebonne Sanitary District Boundary and conveying wastewater flows to the City of Redmond wastewater treatment system (Appendix B; Appendix D).

Under this service model, the District's primary role is to own, manage, and oversee the local collection, conveyance, customer service, administrative, financial, and regulatory functions associated with the Terrebonne sewer utility. The District is not intended to operate a standalone wastewater treatment plant in Terrebonne. Rather, it functions as the local public utility responsible for the STEP collection system and related utility governance.

As system construction, startup, and future expansion occur, the District's responsibilities will include administration of customer connections, operations oversight, rate and fee administration, records management, contracting, regulatory coordination, easement and property coordination, and long-term asset stewardship.

1.4 Statutory Authority

The District is a special district formed under Oregon law and operates pursuant to applicable authorities under ORS Chapter 198, ORS Chapter 450, and other applicable state and local laws (Appendix A).

- acquire, construct, own, improve, operate, and maintain sanitary sewer facilities and related infrastructure;

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- establish and collect rates, fees, charges, and system development charges as authorized by law and District policy;
- enter into contracts and intergovernmental agreements;
- retain professional, technical, administrative, and operational service providers;
- acquire real property interests, including easements, licenses, and access rights necessary for utility purposes;
- undertake annexation proceedings consistent with state law and District policy; and
- adopt resolutions, rules, policies, procedures, and other actions necessary to govern District affairs.

1.5 Relationship to other agencies and service partners

Deschutes County. Deschutes County supported sanitary district formation, infrastructure funding requests, and ongoing coordination related to implementation, growth, and community wastewater service needs. The District will continue to coordinate with the County regarding community planning, building permits, and sewer work in County rights-of-way. (Appendix A; Appendix D).

Oregon Department of Environmental Quality (DEQ). DEQ provides regulatory oversight relevant to wastewater planning, plan approval, compliance, and related funding and permitting requirements (Appendix D).

City of Redmond. The District's collection system is planned to discharge to the City of Redmond wastewater treatment system pursuant to applicable agreements, approvals, and downstream service arrangements (Appendix B).

Oregon Department of Transportation (ODOT). The District must coordinate design, permitting, and construction where facilities are located within the US Highway 97 state rights-of-way and transportation corridors.

Utility Providers. Implementation and operation of the system also require coordination with providers of water, power, communications, gas, irrigation, garbage collection, and mail services.

Property Owners Implementation and operation of the system may require coordination with property owners for access, sewer easements, staging areas, and other site-specific needs (Appendix B).

1.6 Purpose of the District Management Plan

This District Management Plan (DMP) is the District's core governance and management framework. It is intended to describe how the District will function as a public wastewater utility and how the Board will organize authority, administration, operations, financial management, compliance, and future growth over time.

The DMP is not a ordinance, resolution, design manual, construction specification, or engineering report. Instead, it is a policy and management document intended to:

- define governance and administrative roles;

- establish the framework for utility management and accountability;
- clarify the relationship between Board authority and contractor or consultant responsibilities;
- guide future policy development related to operations, rates, reserves, annexation, and asset management;
- support continuity as the District evolves from project development into utility operation; and
- provide a clear reference for Board members, service providers, partner agencies, customers, and funding entities.

The DMP is also intended to help the District move from reactive issue-by-issue decision-making toward a more deliberate framework based on planning, accountability, and continual improvement.

1.7 Guiding principles

Public health and environmental protection. The District exists to reduce health and environmental risks associated with inadequate wastewater service.

Board governance with clear administrative support. The Board governs by establishing policy, direction, and accountability; contractors, operators, and consultants perform assigned technical, operational, and administrative work.

Financial sustainability. Rates, reserves, fees, and capital decisions should support long-term viability of the utility.

Transparency and accountability. As a public entity, the District must conduct business through open meetings, lawful records practices, and documented decision-making.

Equity. Utility costs and obligations should be allocated fairly among existing and future users consistent with law and adopted policy.

Scalability. District policies should support orderly growth and future annexation without undermining current service reliability or financial stability.

Continual improvement. The District should periodically reassess its management practices, service responsibilities, asset information, and performance measures so that the utility becomes more capable and resilient over time.

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2. Governance and Administration

2.1 Board of Directors

2.1.1 Governing body

The District is governed by a five-member Board of Directors. Each board member is an elected public official serving the District as a whole and exercising the powers granted to the District under applicable law.

Board members serve in equal governance roles unless specific officer responsibilities or delegated duties have been formally assigned by Board action. Individual board members do not have independent authority to bind the District unless such authority has been expressly delegated (Appendix C).

2.1.2 Role of the Board

The Board is the District's policy-making and oversight body. Its role is to govern the District, establish utility policy, provide fiscal and administrative oversight, and ensure that the District fulfills its legal and operational responsibilities.

The Board's responsibilities include:

- adopting policies, resolutions, rules, and procedures;
- approving budgets, rates, fees, charges, and system development charge methodologies;
- authorizing major contracts, procurements, and intergovernmental agreements;
- approving significant property, easement, and annexation actions;
- overseeing compliance with applicable public agency requirements;
- establishing long-term direction for operations, growth, and utility management; and
- monitoring District financial, administrative, and strategic performance.

The Board is not intended to perform day-to-day field operations or directly manage technical work except where expressly required by law or approved by Board action. Boards set policy; operators run systems; consultants advise.

2.1.3 Board officers

The Board may designate officers in accordance with applicable law and adopted District procedures. Officer roles may include President, Secretary, Treasurer, Clerk, or other positions the Board determines are needed to support District administration (Appendix C).

Officer assignments are intended to support meeting administration, recordkeeping, financial oversight, document execution, and related administrative functions. Officer designations do not diminish the Board's collective authority or responsibility.

2.1.4 Meetings and public process

The Board shall conduct regular and special meetings in accordance with Oregon Public Meetings Law and applicable District procedures. Formal District action shall occur only at duly noticed meetings (Appendix C).

The Board may use regular meetings for routine business and formal actions, work sessions for policy development and Board education, and special or emergency meetings when time-sensitive action is necessary and legally authorized.

The District shall maintain agendas, minutes, and meeting records sufficient to document Board actions and support public transparency.

2.1.5 Delegation of authority

The Board may delegate limited authority to officers, contractors, consultants, legal counsel, or administrative support providers in order to carry out District business efficiently. Any such delegation should be explicit, documented, and bounded by scope, duration, and, where appropriate, financial thresholds.

In general, the Board retains policy and major financial authority; consultants and administrative support providers prepare recommendations and carry out assigned administrative work; legal counsel advises on governance, contracting, compliance, annexation, and related legal matters; and operations contractors perform field operations and emergency response within the limits of their contracts and District policy.

The Board should retain direct approval authority over adoption and amendment of the DMP, rates and reserve policy, budget adoption and major unbudgeted expenditures, major contracts requiring Board approval under District policy, major agreements affecting system ownership or long-term obligations, and annexation policy decisions and formal annexation actions. Emergency delegation authority should be stated expressly in District policy and revisited again in Section 7 of the DMP.

2.1.6 Board development and oversight expectations

Because the District is a relatively new public utility, elevated effort may be required from the Board during the early years establishing governance, utility literacy, and management systems appropriate to a functioning sanitary district.

Board oversight includes adoption of foundational policies, regular review of financial and operational reports, periodic review of contractor performance, training regarding public meetings, ethics, budgeting, and utility governance, and staged development of more formal asset management, customer service, and emergency response systems over time.

2.2 District administration

2.2.1 Administrative model

The District is a small public utility and is initially expected to operate under a board-governed, contractor-supported administrative model, particularly during system development, startup, and early years of operation.

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Under this model, the Board provides policy direction and oversight, while day-to-day administrative, technical, legal, and operational support is provided through contracted services and designated administrative roles rather than through a large in-house staff structure.

This model is intended to match the scale of the District, make efficient use of limited resources, and allow the District to access specialized expertise as needed. As the District and system grows, it is anticipated that staff will be hired to perform these functions in-house.

2.2.2 Core administrative functions

- Board meeting support, agenda preparation, and minutes;
- legal review and governance support;
- accounting, bookkeeping, and budget support;
- records retention and public records administration;
- contract and procurement administration;
- customer billing and receivables administration;
- coordination related to annexation, easements, and intergovernmental matters;
- engineering and utility planning support; and
- oversight of operations and maintenance contracts.

Some administrative functions may be performed by the same consultant, contractor, or designated District representative depending on Board direction and available resources.

2.2.3 Contracted services

To carry out its responsibilities, the District may retain outside firms or individuals for legal, engineering, financial, administrative, operations, maintenance, and other specialized services.

- legal counsel;
- engineering and technical consultants;
- accounting or bookkeeping support;
- administrative or clerical support;
- customer billing support;
- operations and maintenance contractors; and
- other professional service providers as needed.

District contracts should clearly define scope, deliverables, reporting expectations, compensation, and lines of responsibility. Use of contracted services does not transfer the Board's policy-making responsibility.

2.2.4 Decision authority framework

District responsibilities are divided as follows:

Board	Consultants / administrative support	Operations and maintenance provider
Adopt policy Approve budgets, rates, major contracts, and annexation actions Set oversight expectations.	Prepare analyses, recommendations, draft documents, administrative materials, and other professional deliverables. Support procurement, compliance, and project implementation.	Perform routine field operations and maintenance, respond to alarms and emergencies within contract scope Report system activities to the District.

This framework is intended to preserve clear accountability and avoid confusion between governance, administration, and field operations.

2.2.5 Administrative procedures and continuity

The District should maintain written procedures sufficient to support continuity, accountability, and orderly administration. These procedures may be incorporated into policy manuals, contract scopes, standard operating procedures, or administrative checklists, depending on the function involved.

At minimum, the District should work toward maintaining documented procedures for meeting administration and records, procurement and contract approval, invoice review and payment approval, customer billing and collections, annexation intake and tracking, records requests, emergency contacts and escalation, and operations reporting.

2.2.6 Public records and records management

The District shall maintain records in accordance with applicable law and adopted District policy. Records management shall support transparency, continuity, accountability, and efficient utility administration (Appendix C).

- Board agendas, meeting packets, and minutes;
- adopted policies, resolutions, and ordinances;
- contracts, amendments, and procurement records;
- budgets, financial statements, invoices, and payment records;
- annexation records, easements, and property-related documents;
- customer service and utility administration records; and
- regulatory, engineering, and operational records relevant to District business.

The Board may assign records administration duties to a Clerk, administrative contractor, consultant, or other authorized party, but responsibility for District recordkeeping remains with the District.

2.2.7 Public contracting and procurement administration

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The District shall procure goods, services, personal services, and public improvement work in accordance with applicable law and adopted District contracting policies and procedures (Appendix C).

- consistent with adopted purchasing thresholds and approval requirements;
- documented appropriately;
- scaled to the size and complexity of the work; and
- carried out in a manner that supports fairness, transparency, and legal compliance.

The Board shall retain approval authority where required by law or District policy. The District's administrative model should also ensure that procurement responsibilities, contractor selection, and contract approval are aligned with the distinction between governance and administration.

2.2.8 Financial administration interface

Although financial management is addressed more fully in Section 6 of this DMP, Sections 1-2 recognize that sound administration requires clear financial controls, documented expenditure approval processes, routine financial reporting, and separation of duties where practical.

- proper authorization of accounts and expenditures;
- documented invoice and payment review;
- secure banking and account access controls;
- regular account reconciliation;
- annual budget monitoring; and
- organized financial records sufficient for audit, review, and lender or grantor requirements.

2.2.9 Administrative coordination with growth and annexation

District administration must also support orderly future growth and annexation. This includes intake, tracking, mapping coordination, legal documentation, County coordination, customer communication, and recordkeeping associated with annexation and future service expansion.

Because growth-related actions have legal, financial, operational, and customer service implications, annexation and expansion shall be administered in a manner consistent with adopted District policy and Board direction (Appendix C).

2.2.10 Administrative evolution over time

The District's administrative structure should be expected to evolve as the utility moves from planning and construction into active operation. Early administrative needs may be weighted toward project implementation, legal agreements, funding coordination, and customer enrollment; later needs may shift toward ongoing billing, system oversight, asset management, rate administration, and service tracking.

Accordingly, the DMP should be understood as establishing an initial framework for administration, while allowing the Board to refine service delivery models, reporting expectations, and contractor scopes as the District matures.

Key concept: Boards set policy; operators run systems; consultants advise.

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3. System Description

3.1 STEP Collection System Overview

Chapter 3 describes the Districts wastewater collection system, moving downstream from onsite STEP to the Redmond connection. Chapter 4 explains how it's operated; Chapter 3.2 covers ownership/responsibility.

The Terrebonne Sanitary District sewer system is a STEP collection system. "STEP" stands for Septic Tank Effluent Pump. In a STEP system, wastewater from a home or business first flows into an onsite septic or STEP tank, where solids and grease are retained. The liquid portion of the wastewater is then filtered and pumped from the tank into the District's pressurized sewer collection system. The District's sewer mains carry that effluent away from Terrebonne and ultimately to the City of Redmond wastewater treatment system for treatment and disposal.

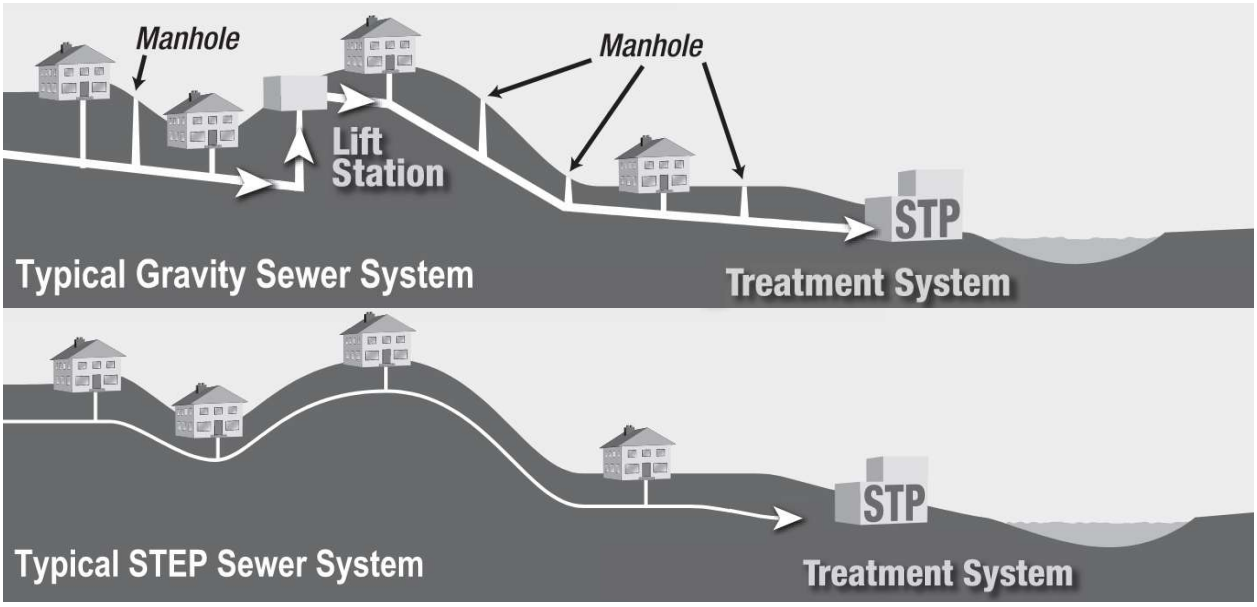

Figure 31 Typical Gravity & STEP System Comparison

This means Terrebonne's sewer system is different from a conventional gravity sewer. A conventional gravity sewer carries raw sewage directly from each building into large gravity pipes. By contrast, a STEP system performs the first stage of treatment onsite (on private property) which retains solids, fats, oils, and grease in the septic tank so that liquid-only effluent is pumped into the public sewer. This reduces solids in the public mains, allows smaller diameter pipes, reduces trench depth, and makes the system more practical in places with shallow rock, topographic constraints, or long distances between service areas. STEP systems are common alternatives to conventional gravity sewer in Oregon.

For the Terrebonne STEP collection system, the wastewater path is:

1. Building plumbing carries wastewater from the structures to the onsite tanks.
2. The onsite tanks retain sludge at the bottom and scum floating on the top.
3. Effluent pump move the liquid portion of the wastewater through a filters and out of the tank.

4. Small-diameter service lines carry that effluent to the District's public pressure mains.
5. The District transmission main carries the effluent to the Redmond treatment plant.

3.1.1 Onsite STEP components

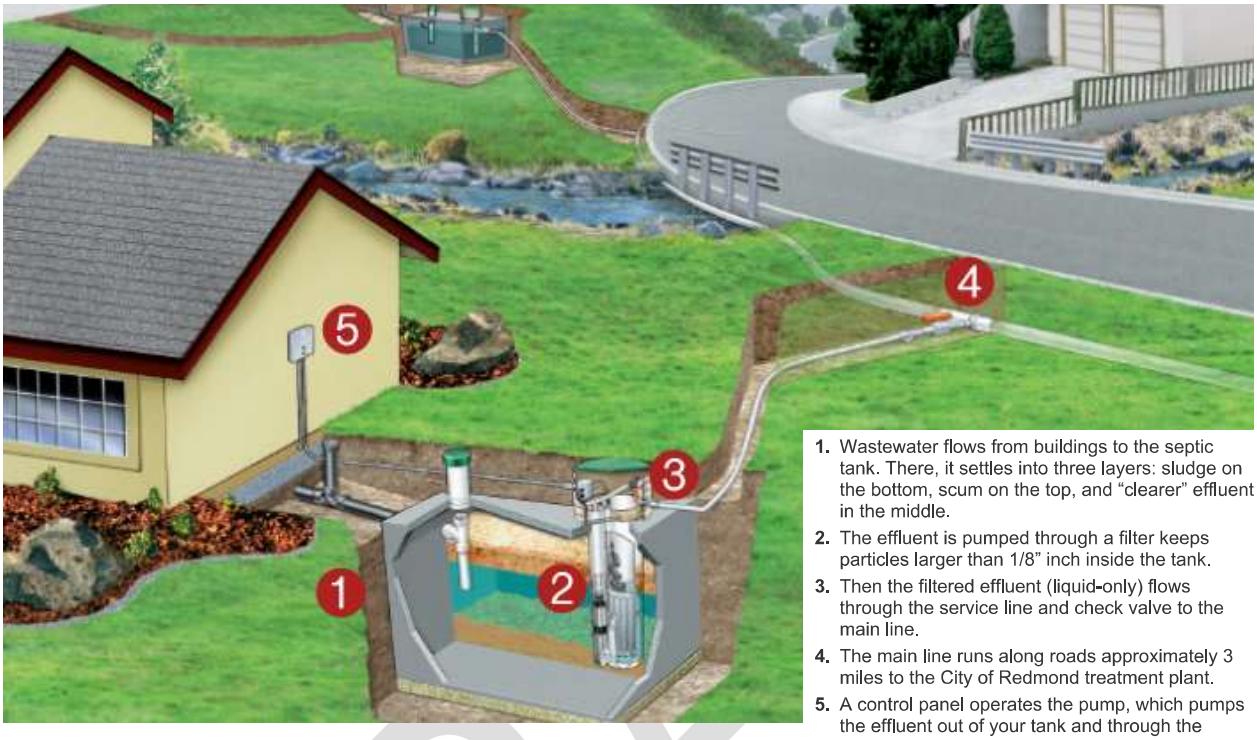

Figure 32 Typical Onsite Residential STEP System Components

Typical onsite and service connection components include:

- an onsite septic tank or integrated STEP unit;
- an effluent filter;
- an effluent pump;
- floats, alarms, and controls;
- a pressure service line;
- a check valve;
- a ball valve; and
- a connection to the public main.

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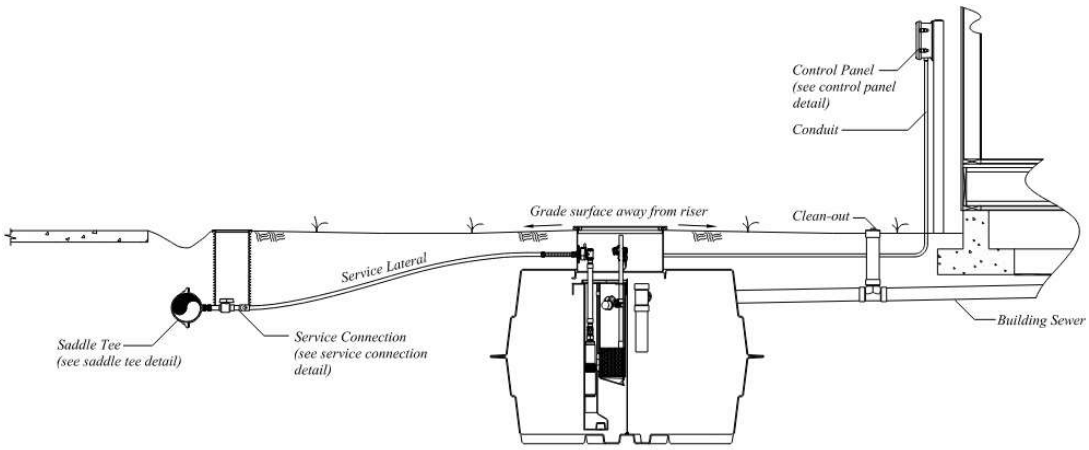

Figure 33 Typical Effluent Sewer Service Connection to STEP Main

On private property, the District expects connected properties to use District-approved onsite STEP equipment. Based on current project design assumptions, this may include:

- retrofit of an acceptable existing septic tank using an approved effluent filter and pump package; or
- installation of a replacement integrated STEP unit where an existing tank is not suitable.

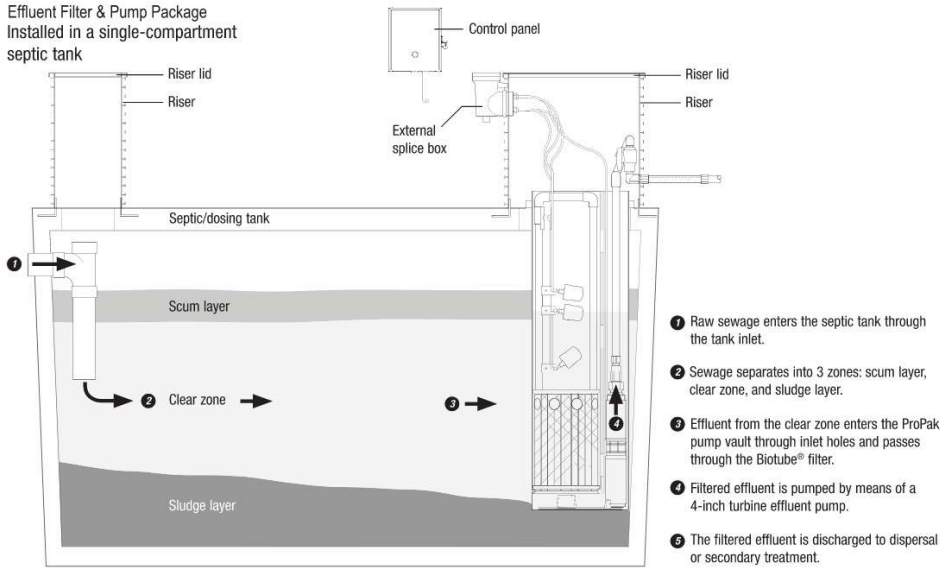

Figure 34 Typical Existing Septic Tank Retrofitted with Effluent Pump Package

In either case, the equipment must meet District standards and current manufacturer installation requirements. District acceptance of any onsite system should confirm that the tank is structurally sound and watertight, the pump and alarm systems function properly, the service line is installed to standard, and all required permits and access rights are in place before connection. County permits for plumbing, electrical, and right-of-way work are anticipated required for connection to the tank and for electrical components such as pumps and alarms, and that regular inspection of STEP tanks, sludge levels, filters, pumps, and alarms should be part of the customer agreement or a maintenance contract. Please see Appendix D for STEP system material information and example standard details.

3.1.2 Service connection

The District's owned-and-operated (public) sewer system begins at the service connection to the District pressure main. The service connection is designed so the property can be isolated from the public system and so the public main does not drain back toward the private property. A typical service connection includes a PVC or HDPE service pipe, a check valve, a ball valve, and a saddle tap, with a locating wire installed in the trench. Please see Appendix D for STEP system material information and example standard details.

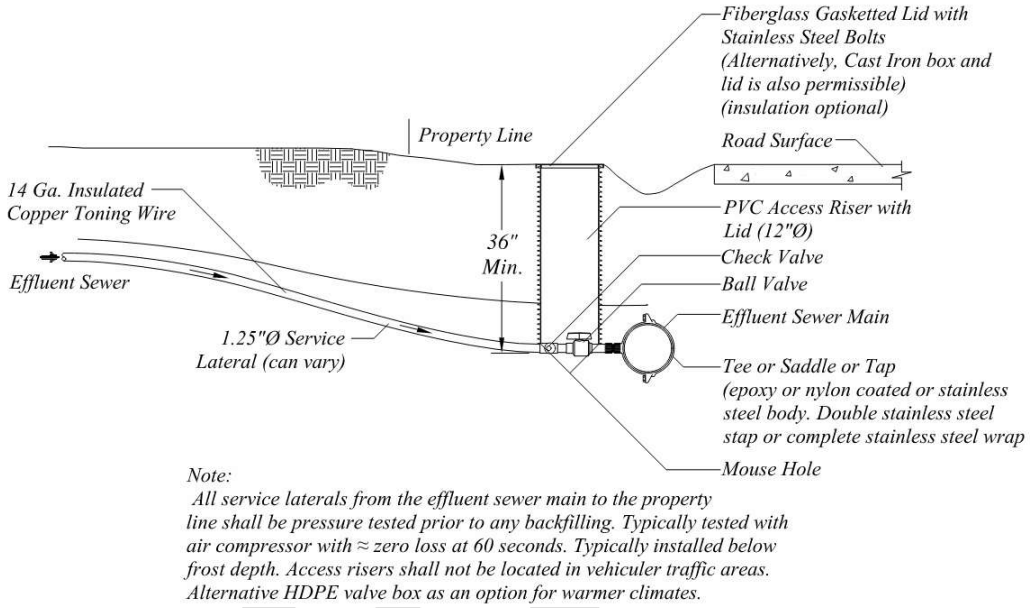

Figure 35 Typical Service Connection Detail

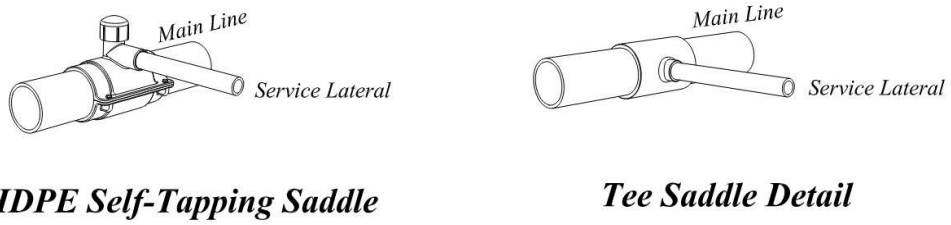

Figure 36 Typical Tapping Saddles for Service Connections to Sewer Mains

3.1.3 Public STEP collection system

Unlike gravity collection systems, manholes are not required at every junction or deflection point. Instead, as a pressurized system, STEP collection mains include many of the same appurtenances typically required on water system mains, as well as odor mitigation devices. The STEP collection system piping network includes a variety of components installed on the public mains so the pressurized system can operate properly, such as:

- STEP collection mains generally ranging from 3-inch to 6-inch diameter that are typically located in the center of a travel lane or outside the pavement in the road shoulder.

- Mainline fittings and appurtenances such as tees and crosses, bends, reducers, and pipe restraint systems (as needed based on pipe material and joint type).
- Isolation valves to segment the pressure mains for normal operation, maintenance, emergency response, and to facilitate future extensions (often at key intersections and at upstream ends of mains).
- Air release / air-vacuum relief valve assemblies at system high points to prevent air accumulation from restricting flow and to manage vacuum conditions during draining or transients.
- Odor control devices at locations where sewer gas may be released (typically air release valve locations and at the downstream discharge connection), such as activated carbon filters and/or other odor-scrubbing components.
- Pig launch/retrieval capability (or other flushing/cleaning access, including potential ice pigging from air release valve locations) where needed for startup debris removal and periodic maintenance.
- Locate and identification measures such as tracer wire and detectable marking/locate tape installed with mains and services to support utility locating and damage prevention.
- Mainline end caps and other stub-outs for future extension where the collection system is planned to expand.

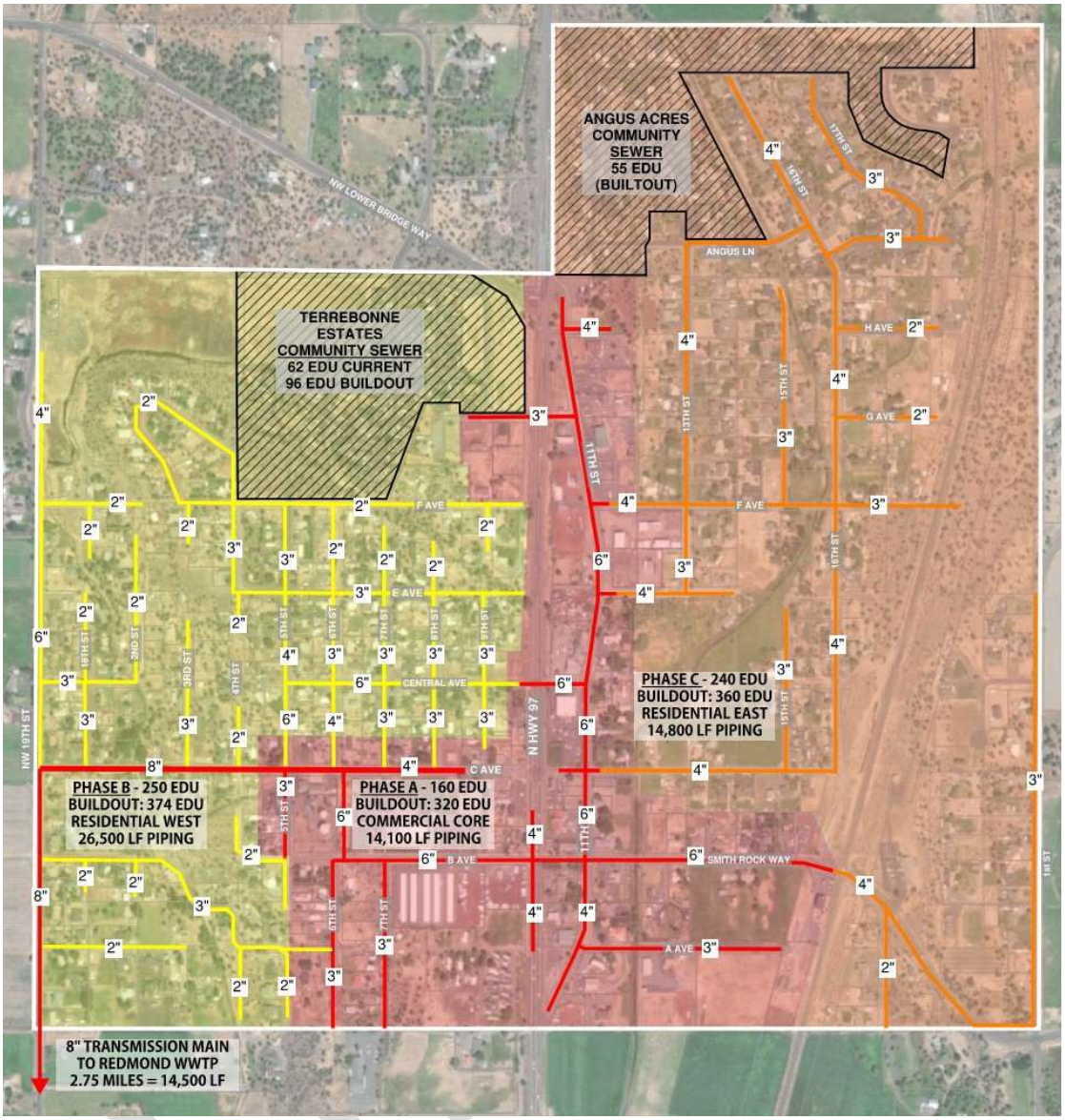

Figure 37 Terrebonne STEP Collection System Map

It is estimated that approximately 320 EDUs can be served by this initial collection system layout. As the collection system expands, more EDUs can be served with 1054 EDUs projected at full buildout.

3.1.4 Transmission main

Core to the District's STEP collection system is the 8-inch transmission main, approximately 3 miles in length, which conveys septic tank effluent from Terrebonne to the City of Redmond wastewater treatment system.

Although Terrebonne is generally located at a higher elevation than the Redmond discharge point, the ground profile between the two communities is not uniform. As the transmission main follows the corridor generally along NW 19th Street, Odem Avenue, and Northwest Way, the

terrain rises and falls at multiple locations. When no effluent is being pumped into the collection system, the water level in the system will generally “level out” to the discharge elevation around 2825’. When multiple pumps are forcing effluent into the system, the friction from the piping pushes back and raises the Hydraulic Grade Line (where the water level wants to be) higher than the pipe elevation, which creates system pressure. Because of these dynamics STEP pumps will operate against different pressure ranges based on their elevation and location in the collection system.

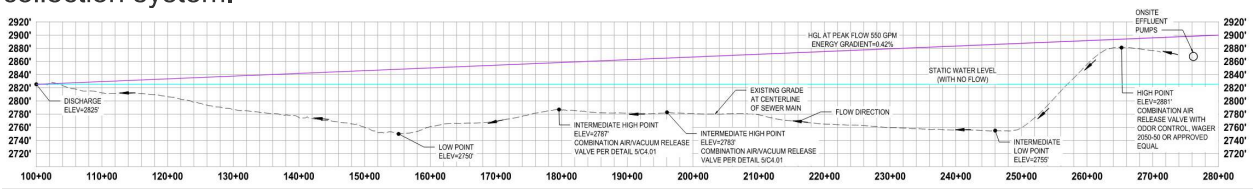

Figure 38 Transmission Main Profile

The profile of the main shows several intermediate high and low points between Terrebonne and the Redmond connection. Because of this undulating terrain, the main is designed with air release / air vacuum valve assemblies (ARVs) at high points to prevent air binding and maintain reliable flow through the pressurized system. Low points and other appurtenances are also identified in the design where needed for operation and maintenance.

The transmission main is intended to function primarily as a conveyance main, carrying flow from the Terrebonne collection system to Redmond, rather than as a local distribution main serving properties along its full length. In general, connections to this main are expected to be limited to properties located within the Terrebonne Unincorporated Community boundary, primarily on the east side of NW 19th Street, that annex into the District and apply for sewer service in accordance with District policy.

This distinction is important because the existence of the transmission main does not mean that all property along the route is automatically eligible for direct connection. Service to properties along or near the main remains subject to District boundary, annexation, capacity, and service application requirements.

3.1.5 City of Redmond discharge point

The downstream discharge point for the Terrebonne STEP collection system is the City of Redmond wastewater treatment system. Wastewater collected by the District’s pressure sewer system is conveyed by the transmission main to the Redmond system for treatment and disposal. Terrebonne will not operate a standalone wastewater treatment plant; the District’s role is collection and conveyance.

At the Redmond end of the system, the Terrebonne project includes a formal interconnection consisting of a connection to an existing City of Redmond manhole and a meter and sampling vault installed immediately upstream of that connection. See STEP Collection System Plans in Appendix D.

The meter and sampling vault is an important part of the interconnection. It is intended to provide the District and the City of Redmond with a defined location for measuring, monitoring, and sampling Terrebonne flows before they enter the Redmond system. The vault will include an in-line electromagnetic flow meter, a sampling port, and pH monitoring equipment, with communications wiring so the flow meter can interface with the City of Redmond’s wastewater operations equipment.

This discharge-point infrastructure serves several purposes:

1. Provides a clear operational and regulatory handoff between the District collection system and the Redmond treatment system.
2. Allows flow measurement for billing, monitoring, and system administration.
3. Provides a defined location for any monitoring or pretreatment-related requirements established through the District's agreement(s) with the City of Redmond.

3.2 System Ownership and Responsibility Overview

The District's STEP collection system iincludes infrastructure owned and controlled by three distinct parties: private property owners, the Terrebonne Sanitary District, and the City of Redmond. Each owner plays a defined role within the overall wastewater service chain, and understanding where each owner's infrastructure begins and ends is essential to describing how the system functions as a whole.

This section describes the physical organization and ownership structure of the system for system description purposes. Detailed operations, maintenance, inspection, emergency response, and contractor responsibilities are addressed separately in Chapter 4 (Operations and Maintenance Framework).

At a high level, the system functions as a connected sequence:

- Private property owners own the onsite wastewater components that enable connection to the public sewer system.
- The Terrebonne Sanitary District owns and manages the public collection and conveyance infrastructure serving the Terrebonne community.
- The City of Redmond owns and operates the downstream wastewater treatment facilities that receive and treat effluent conveyed by the District system.

For system description purposes, the public sewer system begins at the service valve box near the connection to the District pressure main. Infrastructure upstream of that connection is located on private property. Infrastructure downstream of the District's discharge point is owned and operated by the City of Redmond pursuant to applicable intergovernmental and service agreements.

Onsite STEP Components (Private Property Owner Infrastructure)

On private property, the upstream portion of the STEP system includes components such as septic or STEP tanks, effluent pumps, controls, alarms, service piping, and associated electrical supply. These components enable connection to the public sewer system and are located entirely on private property. As a matter of system configuration, onsite STEP components are owned by private property owners and must be installed to District standards and accepted prior to connection. Acceptance establishes compatibility with the public sewer system and confirms that the system is properly configured for service.

Where the District has responsibilities related to STEP system components located on private property, the District must have reliable legal access to those facilities. Accordingly, portions of the onsite system may be subject to recorded easements or other legally sufficient access rights that run with the land and allow access by the District and its authorized representatives. **Figure 39** provides an illustrative example of a typical easement configuration for onsite STEP access.

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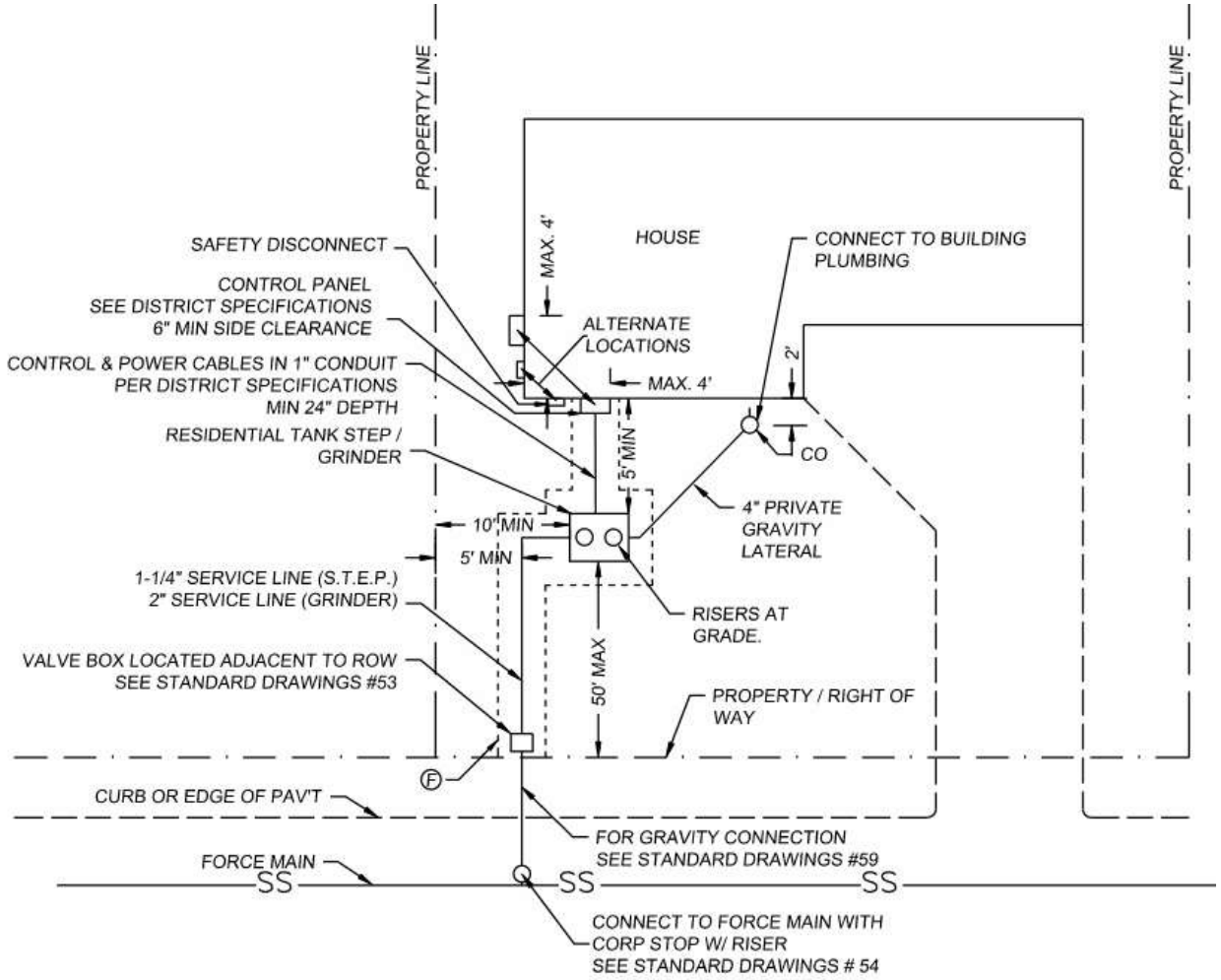

Figure 39 Typical Easement Layout

For system description purposes, these access rights establish the legal interface between private property ownership and public utility responsibilities. The specific circumstances under which easements are required, along with inspection, maintenance, and response provisions, are addressed through adopted policy, customer agreements, and the Operations and Maintenance framework in Chapter 4.

Public Collection and Conveyance System (District Infrastructure)

The Terrebonne Sanitary District owns the public sewer infrastructure that conveys wastewater from the community to the downstream treatment facility. This infrastructure includes public pressure collection mains and associated appurtenances, isolation valves, air-release and air-vacuum valve assemblies, odor control devices, the transmission main conveying effluent to the City of Redmond, and District-owned metering, monitoring, and sampling facilities at the discharge point.

Together, these facilities comprise the District's public sewer system and form the core conveyance backbone serving the Terrebonne community.

Downstream Treatment System (City of Redmond Infrastructure)

Wastewater collected and conveyed by the District system is discharged to the City of Redmond wastewater treatment system for treatment and disposal. Treatment facilities, downstream conveyance, and treatment operations are owned and operated by the City of Redmond in accordance with applicable intergovernmental and service agreements. Terrebonne does not operate a standalone wastewater treatment facility; its role is limited to collection and conveyance.

Ownership and Responsibility Summary

Table 3-1 (Ownership, Maintenance, and Access Responsibility Matrix) summarizes typical ownership and responsibility for major system components across the three ownership categories described above. The table is intended as an at-a-glance system description reference and is implemented through adopted ordinances, executed agreements, easements, and operations contracts.

Preventing disputes (rules of interpretation). If there is any conflict between informal guidance and binding requirements, the following hierarchy applies:
(1) the District's adopted ordinances/resolutions and recorded easements,
(2) executed customer connection/maintenance agreements,
(3) approved plans and standards incorporated by reference, and
(4) general informational handouts.

For any given component, ownership does not automatically determine maintenance responsibility; the responsible party is the one identified in the governing agreement/policy. Where this DMP describes a "typical" division of responsibility, the executed agreements and adopted policies control.

Future documents to be developed pursuant to this section:

- Standard onsite STEP connection agreement
- Standard onsite maintenance agreement
- Standard sewer easement for onsite STEP access
- Ownership and maintenance responsibility matrix
- District inspection/acceptance checklist for owner-installed STEP systems
- Customer responsibilities and access requirements handout
- Policy on routine maintenance versus major replacement

Table 31 Ownership, Maintenance, and Access Responsibility Matrix

System component	Typical owner	Routine inspection / O&M	Capital repair / replacement	Access / control
Building plumbing and building sewer to tank inlet	Property owner	Property owner (or plumber)	Property owner	Owner-controlled
Onsite tank (septic tank or integrated STEP tank)	Property owner (unless District adopts an alternate ownership program in the future)	Typically owner; District may require periodic pumping/inspection via agreement	Property owner (unless otherwise provided by policy/financing program)	Owner-controlled; District access only if a recorded access right is granted
Effluent filter / pump vault filter cartridge	Typically part of the onsite STEP	If District-maintained after acceptance:	If District-maintained after acceptance:	If District-maintained: District access via easement/access

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	equipment (see District equipment acceptance requirements)	District (via O&M provider). Otherwise: owner	District for routine component replacement; otherwise owner	agreement; owner must keep accessible
Effluent pump, floats, alarms, and controls within the tank	Typically part of the onsite STEP equipment (owner-purchased for initial connection unless District policy states otherwise)	If District-maintained after acceptance: District (via O&M provider). Otherwise: owner	Major replacement typically owner unless District policy/fee program allocates replacement differently	If District-maintained: District access via easement/access agreement; owner must keep accessible
Control panel and dedicated electrical supply; electricity consumption	Property owner	Property owner (electrician as needed)	Property owner	Owner-controlled
Pressure service line (private side)	Varies by District policy; typically owner-installed for initial connection	Varies by policy; typically District may maintain after acceptance if included in agreement	Varies by policy; clarify in connection agreement	If District-maintained: District access via easement; otherwise owner
Service connection appurtenances (check valve, shutoff/ball valve, curb box/valve box, locating wire)	District (typical) for the portion in right-of-way / public easement; owner for any private-side components (as defined in agreement)	District (typical)	District (typical)	District-controlled; District may shut off/isolate for maintenance, emergencies, or noncompliance as authorized
Public pressure collection mains and appurtenances	District	District (via O&M provider)	District	District-controlled access within right-of-way/easements
Public isolation valves	District	District (exercise/operate)	District	District-controlled
Air release / air-vacuum valve assemblies and any odor control devices at these locations	District	District (inspect/maintain)	District	District-controlled
Transmission force main to receiving agency	District (unless owned by another agency under agreement)	District (via O&M provider)	District	District-controlled
Metering/sampling vault and instrumentation at/near discharge point (if required)	District (typical)	District (maintain/operate); receiving agency may have access rights per IGA	District	Access and data-sharing as defined in IGA; controlled site access
Receiving agency connection point / downstream treatment facilities	Receiving agency	Receiving agency	Receiving agency	Per intergovernmental/service agreement

4. Operations & Maintenance Framework

4.1 O&M Model

Contracted O&M provider (scope, response expectations)

Emergency response coverage (24/7 on-call)

Coordination with electrical utility

4.2 Preventative Maintenance

Inspection frequencies

Pump rotation/replacement philosophy

Valve and ARV exercising

4.3 Asset Management

Asset inventory (minimum required fields)

Expected service life assumptions

Spare parts philosophy

5. Customer Service & Communication

5.1 Customer onboarding and education

5.2 Alarm response expectations

5.3 Complaint handling (odor, noise, outages)

5.4 District vs homeowner responsibilities

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6. Financial Management

6.1 Rates & Charges

6.2 User rates (O&M + debt service)

6.3 SDC methodology (capacity buy-in, infrastructure credits, etc.)

6.4 Late fees, penalties, lien authority

6.5 Budgeting & Reserves

6.6 Billing & Collections

7. Emergency Response & Risk Management

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8. Regulatory Compliance

8.1 DEQ approvals and conditions

8.2 Reporting requirements

8.3 Recordkeeping

8.4 Inspection and audit readiness

9. Annexation & Growth

9.1 Introduction

The Terrebonne Sanitary District was formed to provide sanitary sewer service over time within Terrebonne and, where appropriate, to expand that service to additional eligible properties. Growth and annexation are therefore part of how the District is expected to develop. Annexation is the legal process used to bring additional territory into the District boundary so that the property may be planned for future sewer service.

Under the District's current Annexation Policy, property within the Terrebonne Unincorporated Community boundary is eligible for annexation. The policy states that annexation is voluntary and subject to approval by the District Board. It also states that annexation will result in property being included in the District service area boundary and set up to be served by the District when a sewer main is provided for connection.

This means annexation has an important but limited effect. Annexation brings property into the District boundary. It does not, by itself, build a sewer main or guarantee immediate service. The District's Annexation Policy expressly states that annexation does not guarantee that sewer service will be made available within a specified timeframe.

The same policy also states that the District Board will use the location of annexed parcels to help prioritize future sewer main extensions. In other words, annexation helps the District identify where future service demand exists, but annexation alone does not commit the District to construct a sewer extension on a fixed schedule.

The County's 2025 annexation order reinforces this same concept. The order and incorporated District resolution state that annexation will result in property being included in the District boundary and set up to be served by the District when a sewer main is provided for connection. The County order also notes that the District is a non-taxing district.

For property owners, the basic annexation questions are:

- **Who can annex?** Property within the Terrebonne Unincorporated Community boundary
- **Is annexation voluntary?** Yes. The current policy states that annexation is voluntary and subject to District approval.
- **What does annexation do?** It adds the property to the District boundary and positions the property to be served by the District when a sewer main becomes available.
- **What does annexation not do?** It does not guarantee that service will be available right away or within a specific timeframe.
- **When do District charges apply?** The policy states that annexed property becomes subject to District rules, regulations, SDC fees, and monthly sewer charges upon connection to the sewer system.

9.2 Mainline Extension Evaluation Framework

The District intends future sewer main extensions to be evaluated using a consistent framework so that expansion occurs in an orderly, cost-effective, and financially sustainable manner. While

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annexation may be approved in advance of service availability, annexation alone does not guarantee immediate construction or connection. Decisions to extend sewer mains and authorize new connections are separate actions and are evaluated independently. Annexation establishes eligibility for future service planning; extension decisions determine when and whether infrastructure investment occurs.

As a baseline principle, the District will consider extending sewer service only when doing so can be accomplished without adversely impacting affordability for existing customers. In general, the District expects that the cost of extending mainlines can be reasonably recovered through system development charges (SDCs) from new connections within a practical timeframe, rather than being subsidized by existing ratepayers.

Before advancing a sewer main extension or prioritizing construction, the District will complete a documented evaluation that addresses, at a minimum, the following considerations:

- Availability of collection, transmission, and downstream treatment capacity (or identification of funded upgrades);
- Financial stability, including consistency with adopted rates, reserves, and funding plans;
- Defined cost allocation consistent with the principle that growth should pay for growth;
- Feasibility of required permits, easements, and right-of-way access; and
- Operational readiness, including the ability of existing O&M coverage and emergency response arrangements to absorb the expanded service area.

9.3 Minimum Service and Screening Criteria

To support consistent decisionmaking and early screening of proposed extensions, the District intends to use minimum service criteria as a practical planning tool. Unless modified by later adopted policy, these criteria are intended to help distinguish between extensions that can reasonably distribute costs across multiple users and extensions that may impose disproportionate cost on the existing system.

In general:

- A proposed mainline extension should have the potential to serve **at least 1 EDU per 50 linear feet** of extension at buildout; and
- The District should generally expect sewer service applications or commitments representing **at least 1 EDU per 100 linear feet** of proposed extension before prioritizing construction.

These thresholds are not absolute requirements, but rather screening benchmarks to guide planning, prioritization, and funding discussions. Meeting these benchmarks does not, by itself, obligate the District to construct an extension. **Table 91** provides an example of how minimum service criteria may be applied for planning purposes.

Table 91 Example Minimum Service Criteria for Mainline Extensions

Proposed Extension Length (LF)	Potential EDUs served by extension	Near-term EDUs to be served by extension	Meets Potential EDU Screening (1 EDU / 50 LF)	Meets NearTerm EDU Screening (1 EDU / 100 LF)

500	12	6	Yes	Yes
500	8	3	No	No
1,000	25	12	Yes	Yes
1,000	15	6	No	No

9.4 Mainline Extensions by Property Owners & Developers

In some cases, a property owner or developer may propose to construct a sewer main extension on behalf of the District. Any such extension must be designed, installed, tested, and inspected in accordance with District standards and accepted by the District before being placed into service.

Subject to later policy development, the District may allow all or a portion of the eligible cost of a developer-constructed extension to be applied as a credit against sewer system development charges otherwise due for the development. Any such credit would generally be limited to the portion of the work that:

- Is required by the District;
- Is constructed to District standards;
- Is accepted by the District; and
- Provides capacity or public benefit beyond the immediate needs of the constructing property.

This framework is intended to support future developer participation while avoiding case-by-case negotiation each time an extension is proposed. Any such arrangements would be documented through separate agreements and implemented consistent with adopted District policy.

9.5 Board decision framework and documentation

For any annexation-related service expansion, the Board should document: (1) the area and EDUs to be served; (2) the capacity basis (including downstream capacity/requirements, as applicable); (3) the funding approach and cost allocation; (4) required easements/access rights and customer agreement requirements; and (5) schedule/phasing and any conditions precedent. Clear documentation helps prevent disputes about who pays, who maintains, and when service becomes available.

9.6 Relationship to Future Policy Development

This section establishes the overall framework for evaluating annexationrelated growth and future mainline extensions. More detailed rules and procedures will still need to be developed through adopted policy, including:

- Annexation decision criteria;
- Methods for evaluating capacity and phasing;
- Criteria for Districtfunded versus developerfunded extensions;
- Calculation and documentation of SDC credits;
- Circumstances under which annexed properties may be required to connect; and

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- Prioritization among multiple eligible extension areas.

For now, the key point is straightforward: annexation is the District's mechanism for orderly future growth, while infrastructure extension decisions are guided by minimum service, cost-effectiveness, and system-readiness considerations.

10. Plan Review & Updates

10.1 Annual review

10.2 Triggers for updates (rate changes, expansion, incidents)

10.3 Board adoption and amendment process

Appendices

Appendix A – District Formation and Organizational Documents

- Formation orders and petition materials
- District boundary / organizational references
- Non-taxing district basis and board structure references

Appendix B – Intergovernmental and Utility Service Agreements

- City of Redmond treatment agreement / IGA
- Easement MOU(s) and recorded easements
- Other key agency coordination agreements

Appendix C – Adopted District Policies and Governance Documents

- Board Duties and Responsibilities Policy
- Financial Management Policy
- Public Records Request Policy
- Public Contracting Rules and Procedures
- Annexation Policy and Criteria
- Sewer Use Ordinance

Appendix D – System Planning and Engineering References

- Preliminary Engineering Report
- Current STEP collection system design basis / plans / specifications / estimate
- Relevant funding and regulatory planning documents

Appendix E – Administrative Forms and Implementation Tools

- Annexation application materials
- Records request procedures/forms
- Procurement threshold summary
- Delegation / decision authority matrix

Appendix F – Operations and Asset Management Support Materials

- Initial asset inventory framework
- SOP list and adopted SOPs
- Emergency contacts / escalation framework

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- Key operational reporting templates