

Valle Vista/Creek Bridge
Community Meeting
Wednesday May 24, 2023

6 PM City Library

Defining a Special Assessment District

- State Highway Act- Establishing Landscape and Lighting Districts
- Established by a “majority” vote of the property owners
- “Special Assessment” defined
- Equity- cost estimated and distributed among property owners
- Established by the original Engineer’s Report
- Approved by the City Engineer
- Paid with the Property Tax Bill every year
- Tax Assessor then sends the Assessment revenue to the City to provide the “special services” for this community
- Annual Renewal Required; significant changes require a new vote

Valle Vista

- Establishment Required by the City before approving the Parcel Map
- Recorded on each property's title- full disclosure
- Services strictly defined and costs distributed in the 2003 Engineer's Report
- The Report has 5 parts
 - Improvement specification- defining what is being built to be maintained
 - Cost Estimate
 - Allocation of costs spread to each parcel that benefits ("the Assessment")
 - The method for spreading the cost equitably
 - A map showing all parcels

PART A - Plans and specifications for the improvements to be maintained and operated are filed with the City Clerk. Although separately bound, the plans and specifications are a part of this report and are included in it by reference.

PART B - An estimate of the cost of the improvements to be maintained and/or operated.

PART C - An assessment of the estimated cost of the improvement to be maintained and/or operated on each benefited parcel of land within the assessment district, including a list of the names and addresses of the owners of real property within the assessment district, as shown on the last equalized assessment roll for taxes, or as known to the Clerk. The list is keyed to Exhibit B by assessment number.

PART D - A statement of the method by which the undersigned has determined the amount proposed to be assessed against each parcel.

PART E - Exhibit B, a diagram showing all of the parcels of real property within this assessment district. The diagram is keyed to Part C by assessment number.

"EXHIBIT B"

CITY OF SAN JUAN BAUTISTA - SAN BENTO COUNTY
STATE OF CALIFORNIA

ASSESSMENT DIAGRAM

VALLE VISTA
LIGHTING AND LANDSCAPE
MAINTENANCE ASSESSMENT DISTRICT NO. 1



MARK THOMAS & COMPANY, INC.
2000 W. 10TH STREET, SUITE 200
SAN JUAN BAUTISTA, CA 94022



1 ASSESSMENT NUMBER

FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY OF
SAN JUAN BAUTISTA, COUNTY OF SAN BENTO, STATE OF
CALIFORNIA THIS ____ DAY OF ____, 200__.

CITY CLERK OF THE CITY OF SAN JUAN BAUTISTA

RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS
OF THE CITY OF SAN JUAN BAUTISTA, COUNTY OF SAN BENTO,
STATE OF CALIFORNIA THIS ____ DAY OF ____, 200__.

SUPERINTENDENT OF STREETS CITY OF SAN JUAN BAUTISTA

AN ASSESSMENT WAS LEVIED BY THE CITY COUNCIL OF THE CITY OF
SAN JUAN BAUTISTA, COUNTY OF SAN BENTO, STATE OF CALIFORNIA
ON THE LOTS, PRECES AND PARCELS OF LAND SHOWN ON THIS
ASSESSMENT DIAGRAM. SAID ASSESSMENT WAS LEVIED ON THE
DAY OF ____, 200__, THE ASSESSMENT DIAGRAM AND THE
ASSESSMENT ROLL WERE RECORDED IN THE OFFICE OF THE
SUPERINTENDENT OF STREETS OF THIS CITY ON THE
DAY OF ____, 200__. REFERENCE IS HEREBY MADE TO THE
ASSESSMENT ROLL RECORDED IN THE OFFICE OF THE SUPERINTENDENT
OF STREETS FOR THE EXACT AMOUNT OF EACH ASSESSMENT LEVIED
AGAINST EACH PARCEL OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM.

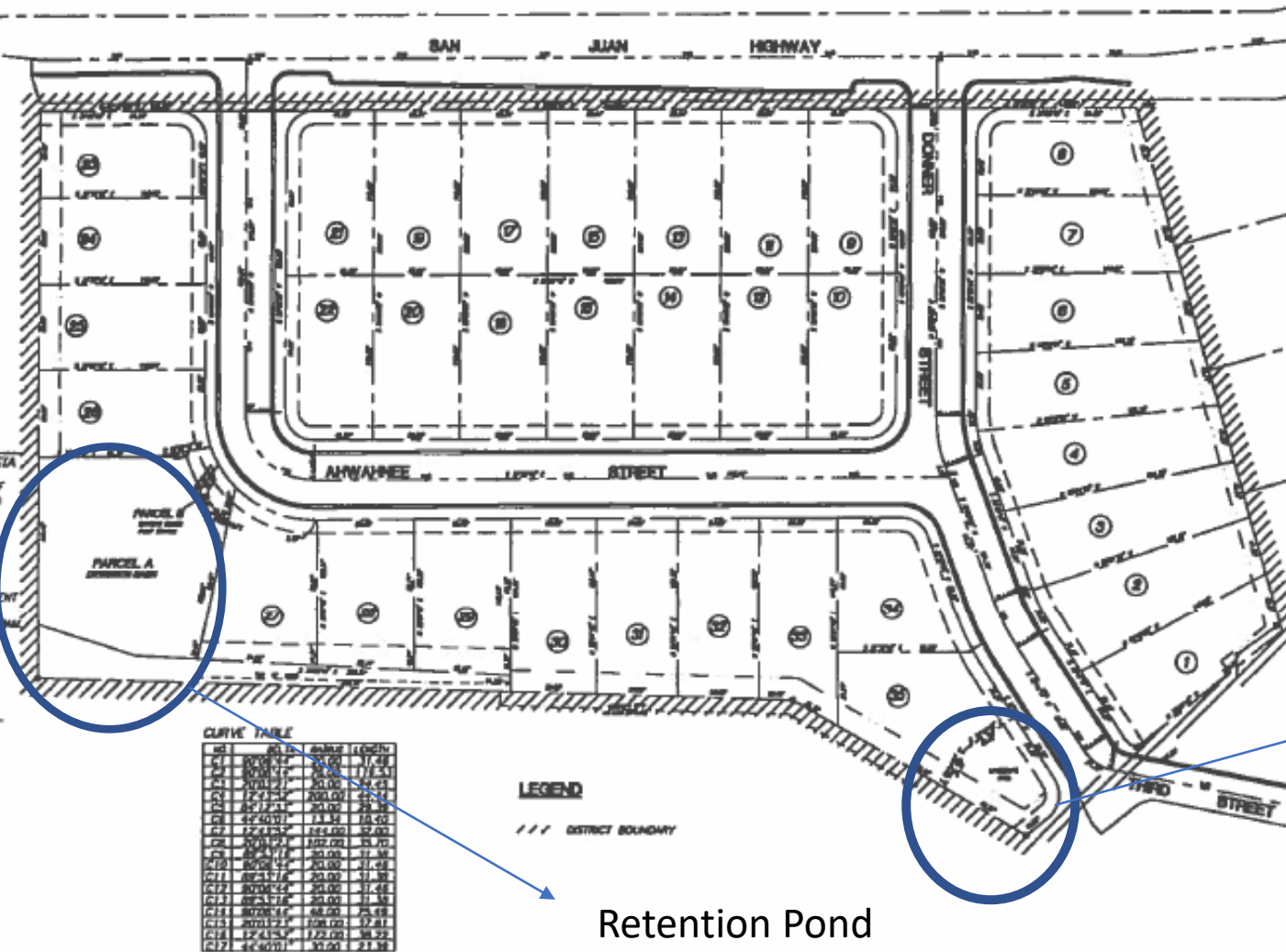
CITY CLERK OF THE CITY OF SAN JUAN BAUTISTA

FILED THIS ____ DAY OF ____, 200__, AT THE HOUR OF
O'CLOCK ____ M. IN BOOK ____ OF MAPS OF
ASSESSMENT AND COMMUNITY FACILITIES DISTRICTS AT PAGE ____
IN THE OFFICE OF THE COUNTY RECORDER OF THE COUNTY OF
SAN BENTO, STATE OF CALIFORNIA.

COUNTY RECORDER
BY ____ DEPUTY

THE UNDERSIGNED COUNTY AUDITOR OF THE COUNTY OF
SAN BENTO HEREBY CERTIFIES THAT A CERTIFIED COPY OF THIS
ASSESSMENT DIAGRAM AND THE ASSESSMENT ROLL WERE
FILED IN MY OFFICE THIS ____ DAY OF ____, 200__.

COUNTY AUDITOR
COUNTY OF SAN BENTO



NO.	AREA	LENGTH
C1	0000000	17.48
C2	0000000	17.48
C3	0000000	17.48
C4	0000000	17.48
C5	0000000	17.48
C6	0000000	17.48
C7	0000000	17.48
C8	0000000	17.48
C9	0000000	17.48
C10	0000000	17.48
C11	0000000	17.48
C12	0000000	17.48
C13	0000000	17.48
C14	0000000	17.48
C15	0000000	17.48
C16	0000000	17.48
C17	0000000	17.48
C18	0000000	17.48
C19	0000000	17.48
C20	0000000	17.48
C21	0000000	17.48
C22	0000000	17.48
C23	0000000	17.48
C24	0000000	17.48
C25	0000000	17.48
C26	0000000	17.48
C27	0000000	17.48
C28	0000000	17.48
C29	0000000	17.48
C30	0000000	17.48
C31	0000000	17.48
C32	0000000	17.48

LEGEND
--- DISTRICT BOUNDARY

**PART C
ASSESSMENT ROLL
VALLE VISTA LIGHTING & LANDSCAPING MAINTENANCE ASS
FISCAL YEAR 2003-2004**

ASSESSMENT NO.	OWNER	ASSESSOR'S PARCEL NO.	ASSESSMENT UNITS	SUBTOTAL ASSESSMENT 2003-2004	SUBTOTAL ASSESSMENT 2004-2008	SL ASS 2009
1	CREEKBRIDGE HOMES	002-60-0-019-0	1	1,581.43	1,399.71	
2	CREEKBRIDGE HOMES	002-60-0-018-0	1	1,581.43	1,399.71	
3	CREEKBRIDGE HOMES	002-60-0-017-0	1	1,581.43	1,399.71	
4	CREEKBRIDGE HOMES	002-60-0-016-0	1	1,581.43	1,399.71	
5	CREEKBRIDGE HOMES	002-60-0-015-0	1	1,581.43	1,399.71	
6	CREEKBRIDGE HOMES	002-60-0-014-0	1	1,581.43	1,399.71	
7	CREEKBRIDGE HOMES	002-60-0-013-0	1	1,581.43	1,399.71	
8	CREEKBRIDGE HOMES	002-60-0-012-0	1	1,581.43	1,399.71	
9	CREEKBRIDGE HOMES	002-60-0-011-0	1	1,581.43	1,399.71	
10	CREEKBRIDGE HOMES	002-60-0-035-0	1	1,581.43	1,399.71	
11	CREEKBRIDGE HOMES	002-60-0-010-0	1	1,581.43	1,399.71	
12	CREEKBRIDGE HOMES	002-60-0-034-0	1	1,581.43	1,399.71	
13	CREEKBRIDGE HOMES	002-60-0-009-0	1	1,581.43	1,399.71	
14	CREEKBRIDGE HOMES	002-60-0-033-0	1	1,581.43	1,399.71	
15	CREEKBRIDGE HOMES	002-60-0-008-0	1	1,581.43	1,399.71	
16	CREEKBRIDGE HOMES	002-60-0-032-0	1	1,581.43	1,399.71	
17	CREEKBRIDGE HOMES	002-60-0-007-0	1	1,581.43	1,399.71	
18	CREEKBRIDGE HOMES	002-60-0-031-0	1	1,581.43	1,399.71	
19	CREEKBRIDGE HOMES	002-60-0-006-0	1	1,581.43	1,399.71	
20	CREEKBRIDGE HOMES	002-60-0-030-0	1	1,581.43	1,399.71	
21	CREEKBRIDGE HOMES	002-60-0-005-0	1	1,581.43	1,399.71	
22	CREEKBRIDGE HOMES	002-60-0-029-0	1	1,581.43	1,399.71	
23	CREEKBRIDGE HOMES	002-60-0-004-0	1	1,581.43	1,399.71	
24	CREEKBRIDGE HOMES	002-60-0-003-0	1	1,581.43	1,399.71	
25	CREEKBRIDGE HOMES	002-60-0-002-0	1	1,581.43	1,399.71	
26	CREEKBRIDGE HOMES	002-60-0-001-0	1	1,581.43	1,399.71	
27	CREEKBRIDGE HOMES	002-60-0-028-0	1	1,581.43	1,399.71	
28	CREEKBRIDGE HOMES	002-60-0-027-0	1	1,581.43	1,399.71	
29	CREEKBRIDGE HOMES	002-60-0-026-0	1	1,581.43	1,399.71	
30	CREEKBRIDGE HOMES	002-60-0-025-0	1	1,581.43	1,399.71	
31	CREEKBRIDGE HOMES	002-60-0-024-0	1	1,581.43	1,399.71	
32	CREEKBRIDGE HOMES	002-60-0-023-0	1	1,581.43	1,399.71	
33	CREEKBRIDGE HOMES	002-60-0-022-0	1	1,581.43	1,399.71	
34	CREEKBRIDGE HOMES	002-60-0-021-0	1	1,581.43	1,399.71	
35	CREEKBRIDGE HOMES	002-60-0-020-0	1	1,581.43	1,399.71	
				\$ 55,350.05	\$ 48,989.65	\$

61-52001-001

PART B
VALLE VISTA
LIGHTING & LANDSCAPE
MAINTENANCE ASSESSMENT DISTRICT NO. 1
2003-2004 BUDGET ESTIMATES

EXPENDITURE PROJECTIONS	VALLE VISTA (Fiscal Year 2003-2004)	VALLE VISTA (Fiscal Year 2004-2008)	VALLE VISTA (Fiscal Year 2009 & Beyond)
Retention Pond Landscaping and Irrigation System	\$18,000.00	\$18,000.00	\$18,000.00
Landscaping - 5% Replacement / year Street Trees - Trimming and 5% Replacement / year	\$5,500.00	\$5,500.00	\$5,500.00
Water Supply Charges	\$1,000.00	\$1,000.00	\$1,000.00
Electrical Charges	\$200.00	\$200.00	\$200.00
Street Lighting - (reserve for future repair)	\$1,232.00	\$1,232.00	\$1,232.00
Street Lighting - Utilities	\$3,285.00	\$3,285.00	\$3,285.00
Biological Monitoring	\$10,000.00	\$10,000.00	\$0.00
Engineer's Report	\$6,000.00 *	\$3,000.00 *	\$3,000.00 *
Printing & Advertising	\$1,000.00 *	\$1,000.00 *	\$1,000.00 *
Legal Fees (District Formation)	\$6,000.00 *	\$3,000.00 *	\$3,000.00 *
	\$52,217.00	\$46,217.00	\$36,217.00
City Administration (6%+/-)	\$3,133.02	\$2,773.02	\$2,173.02
Total Projected Expenditures	\$55,350.02	\$48,990.02	\$38,390.02
Per Lot	\$1,581.43	\$1,399.71	\$1,096.86
Collection (County) - \$15 per lot	\$15.00	\$15.00	\$15.00
Assessment Total 1 Single Family Lot	\$1,596.43	\$1,414.71	\$1,111.86

*Initial

General Responsibilities

Maintenance and operation of any or all public landscaping and irrigation improvements and street lighting, of a local nature, on landscaped strips of land between back of curb and front of walk and for planter walls/fences, including jogging paths, planter walls, grass berms, appurtenant irrigation systems; ornamental plantings including lawns, shrubs, and trees; including necessary repairs, replacements, water, electric current, spraying, care, supervision, debris removal; park strip repair and replacement: including biological monitoring, and any and all other items of work necessary and incidental for the proper maintenance and operation thereof and all additions, improvements and enlargements thereto which may hereafter be made on the following described streets:







January 25, 2023 at 9:41:50 AM



January 25, 2023 at 9:42:06 AM



January 25, 2023 at 9:42:16 AM



January 25, 2023 at 9:42:34 AM



January 25, 2023 at 9:43:00 AM



January 25, 2023 at 9:43:37 AM

Street Scape

Proposed Donner Street, Proposed Ahwahnee Street, Existing First Street (San Juan Highway) and Existing Third Street – as shown on the “Creekbridge Homes Valle Vista, San Juan Bautista, California”, Sheets L-1 through L-13.

Maintenance and operation of any or all public landscaping and irrigation improvements, of a local nature, of the following described areas, including detention basin landscaping and bank protection, park improvements, appurtenant irrigation systems; ornamental plantings including lawns, shrubs, and trees; including necessary repairs, replacements, water, electric current, spraying, care, supervision, debris removal; including biological monitoring, and any and all other items of work necessary and incidental for the proper maintenance and operation thereof and all additions, improvements and enlargements thereto which may hereafter be made on the following described work:



January 26, 2023 at 10:28:16 AM



January 26, 2023 at 10:28:17 AM



January 26, 2023 at 10:28:19 AM

Not Eligible under
Formation report

To: Don Reynolds, City Manager

From: Jim and Aida Pisano, Ahwahnee St
408-427-5767

RE: Condition of sidewalk on Ahwahnee

Parcels

Parcel A Detention Basin, Parcel B Sanitary Sewer Pump Station – located on Ahwahnee Street as shown on the “Creekbridge Homes Valle Vista, San Juan Bautista, California”, Sheets L-1 through L-13.

Parcel C, Proposed Public Park (San Juan Park) – located on the corner of Donner Street. and Third Street as shown on the “Creekbridge Homes Valle Vista, San Juan Bautista, California”, Sheets L-1 through L-13.

Incidental costs including contingencies, and assessment district incidentals including engineering, printing, and notices to property owners, collection costs, legal fees, administration and supervision, are assessed to the District on the same basis as the improvements specified above.

District was formed in 2003. Initial Assessment was set at \$1,596.43, including the County fee of \$15 per parcel
 The 2003/04 Eng. Rpt. Also set the estimated assessments for the 2004 through 2008 at \$1,414.71 per parcel, based on reduced costs.
 For 2009 and "beyond", the estimated rate was set at \$1,111.86, again, assuming reduced costs in those years.
 Used the SF/Oakland/Hayward CPI for All Urban Consumers. This is standard, although it was not specified in formation report.

		Max. Assessment	April			% Increase
1st Year	2003/04	\$1,596.43	2003	196.3	N/A	N/A
	2004/05	\$1,612.71	2004	198.3	101.019%	1.02%
	2005/06	\$1,630.27	2005	202.5	102.118%	2.12%
	2006/07	\$1,646.88	2006	208.9	103.160%	3.16%
	2007/08	\$1,649.43	2007	215.842	103.323%	3.32%
	2008/09	\$1,642.57	2008	222.074	102.887%	2.89%
	2009/10	\$1,609.20	2009	223.854	100.802%	0.80%
	2010/11	\$1,623.89	2010	227.697	101.717%	1.72%
	2011/12	\$1,641.45	2011	234.121	102.821%	2.82%
	2012/13	\$1,629.64	2012	238.985	102.078%	2.08%
	2013/14	\$1,634.43	2013	244.675	102.381%	2.38%
	2014/15	\$1,640.97	2014	251.495	102.787%	2.79%
	2015/16	\$1,635.38	2015	257.622	102.436%	2.44%
	2016/17	\$1,639.53	2016	264.565	102.695%	2.70%
	2017/18	\$1,656.93	2017	274.589	103.789%	3.79%
	2018/19	\$1,647.84	2018	283.422	103.217%	3.22%
	2019/20	\$1,660.45	2019	294.801	104.015%	4.01%
	2020/21	\$1,614.15	2020	298.074	101.110%	1.11%
	2021/22	\$1,657.19	2021	309.419	103.806%	3.81%
	2022/23	\$1,676.19	2022	324.878	104.996%	5.00%
	2023/24	\$1,660.91	2023	338	104.039%	4.04%

April CPI published in early June

Projected Revenues and Expenses

Four major corrections are needed to set the District back into a positive trend

1) In 2021, the City Manager reported the District had an \$80,000 surplus and this was not correct

The report was misinterpreted from fund balances- and the reserve was half - \$40,000

2) The District depleted its reserves in 2021 trimming trees and fixing the gazebo and fences.

\$12,800 for trees

\$23,300 for painting light posts and gazebo

3) In 2022, the City added a small portion of staff costs as an administrative cost of approximately \$5,000

This was an error- Administrative Costs are only \$850 and accounted for in a different line item

4) In 2022, no cost of living increase was added to the Assessment-

The assessment remained for 2-years at \$603.26

Landscaping costs went from \$1,290 per month to \$1,365 (a 5.8% increase)

By June 20, 2022, after removing staff costs, expenses are expected to exceed revenues by \$1,212

CPI since 2021 would have increased it 11.85%

This year the District should increase at least 10% and begin catching up (\$60)

Budget for Fiscal Year 2022/23

BUDGET FY 22-23			PROJECTED YEAR-END	BUDGET FOR 23/24	
				10% inc	
REVENUE			\$ 603.26	\$ 663.59	
		NOT CLEAR			
Special Assessments		26,529	21,717	23,889	
		22/23		23/24	
EXPENSE		Budget	Expenses (projected)	Budget	
<u>Description</u>					
City Personnel Costs		4,912	-	-	
Utility Water Base Fee					
Utility Water Usage charge		3,200	2,800	2,912	
Advertising Cost		100	-	100	
Operational Contracts					
Printing & Copies					
Legal Cost		100	-	100	
PW Pond Cleanup					
Grounds Maint. - Outside		1,000	1,862	-	
Adminstration Cost		850	850	850	
PG&E Cost		720	990	1,000	
Contract Landscaping		15,047	16,427	17,100	
Contract Landscaping					
Contingency		300	-	630	
Reserves		300	-	1,000	
TOTAL		26,529	0 22,929	23,692	
Balance		-	(1,212)	197	(1,015)

Special Assessment Amount

Referring to the Formation report, the Maximum Assessment amount has increased from 1,111.86 in 2006, Adding cost of living each year:

Maximum Allowable to assess is \$1,660.91

The cost of living in 2023 is 4%

With costs at \$23,692, recommending a 10% increase to “break even” and start catching up

A 10% Increase (equal to the last two years of CPI), would be \$60 or \$663.59

This would provide \$23,889 to cover \$23,692 in expenses

Summary

Cost of Living Increases accrue every year

2014 decision to decrease the cost of the District by the City Engineer occurred

A cost of living increase may not be assessed “if deemed to be unnecessary” but they accrue

In 2021, used reserves for tree trimming, gazebo and light pole painting

Reserves- establishing a 150% reserve amount? **Need to get to \$36,000 in reserves**

Landscape Services are the highest expense. Shop for more competitive price?

Need for one-time expenses – i.e. fence and sidewalk repairs?

DISCUSSION AND QUESTIONS ?