

Valle Vista/Creek Bridge
Community Meeting Thursday
July 1, 2021

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



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, PLOTS 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.

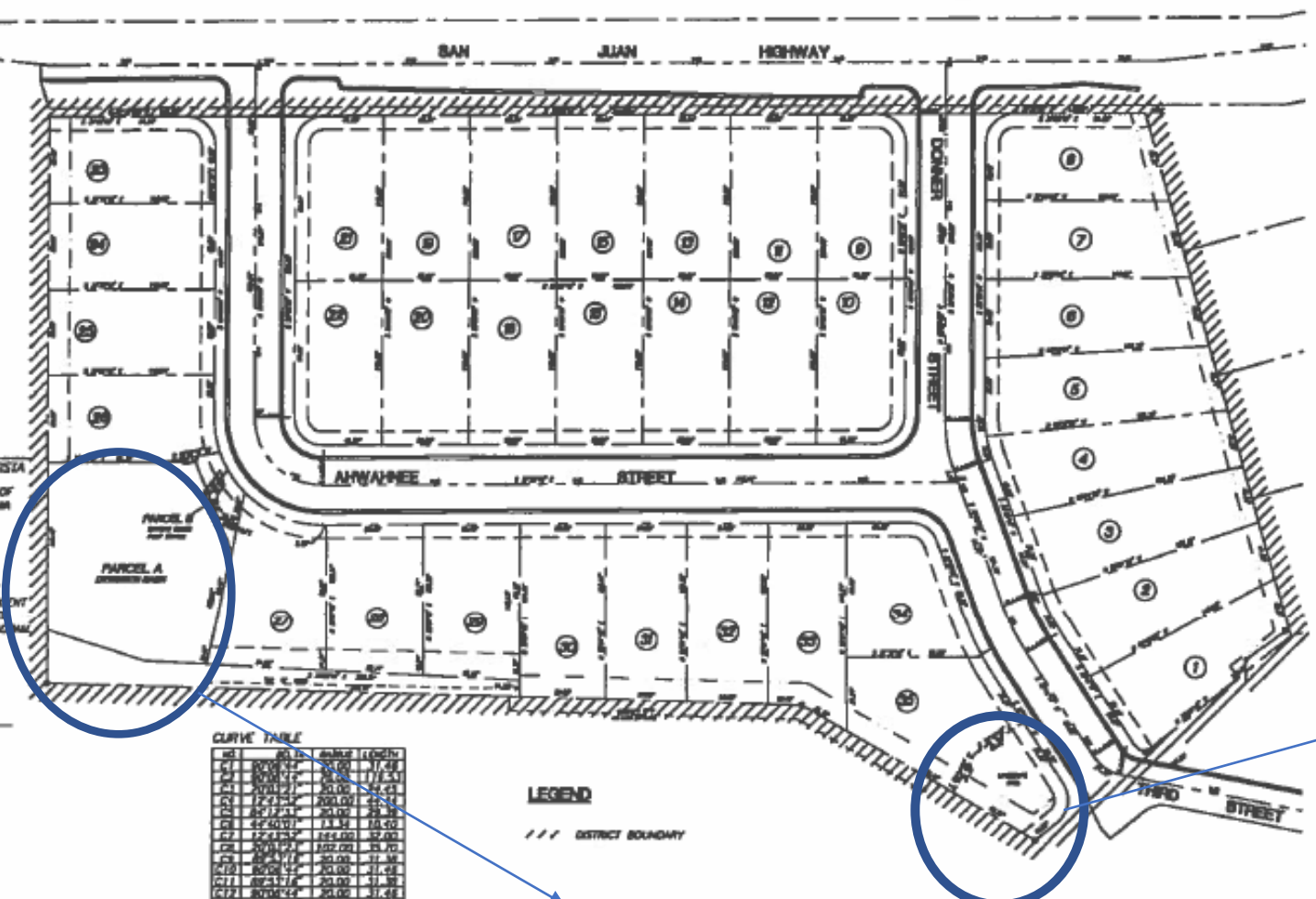
CITY CLERK OF THE CITY OF SAN JUAN BAUTISTA

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



CURVE TABLE

NO.	PI	RI	CHORD	LENGTH
C1	800.000	20.00	17.28	17.28
C2	800.000	20.00	17.28	17.28
C3	800.000	20.00	17.28	17.28
C4	127.250	200.00	24.14	24.14
C5	80.000	20.00	16.00	16.00
C6	42.500	11.32	10.00	10.00
C7	127.250	200.00	24.14	24.14
C8	200.000	100.00	14.14	14.14
C9	80.000	20.00	16.00	16.00
C10	80.000	20.00	16.00	16.00
C11	80.000	20.00	16.00	16.00
C12	80.000	20.00	16.00	16.00
C13	200.000	100.00	14.14	14.14
C14	127.250	200.00	24.14	24.14
C15	42.500	11.32	10.00	10.00

LEGEND
/// DISTRICT BOUNDARY

Retention Pond

Park

**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	\$

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:

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:

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.

Valle Vista Landscape and Lighting District						
Budgets						
		<u>FY 18</u>	<u>FY 19</u>	<u>FY20</u>	<u>FY 21</u>	<u>FY 22</u>
<u>Description</u>						
Utility Water Base Fee		2400	2400	2400	2400	2400
Utility Water Usage charge		800	800	800	800	800
Advertising Cost		100	100	100	100	100
Printing & Copies		100	100	100	100	100
Legal Cost		100	100	100	100	100
Engineering Cost		300	300	0	0	0
Adminstration Cost		850	850	850	850	850
PG&E Cost		2200	2200	720	720	720
Contract Landscaping		12624	12624	15047	15047	15612
Contingency		300	300	300	300	300
Reserves		300	300	300	300	300
PW Clean out of Pond		<u>0</u>	<u>0</u>	<u>1000</u>	<u>1000</u>	<u>1000</u>
		20074	20074	21717	21717	22282

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	101.02%	1.02%							
	2005/06	\$1,630.27	2005	202.5	102.12%	2.12%							
	2006/07	\$1,646.88	2006	208.9	103.16%	3.16%							
	2007/08	\$1,649.43	2007	215.842	103.32%	3.32%							
	2008/09	\$1,642.57	2008	222.074	102.89%	2.89%							
	2009/10	\$1,609.20	2009	223.854	100.80%	0.80%							
	2010/11	\$1,623.89	2010	227.697	101.72%	1.72%							
	2011/12	\$1,641.45	2011	234.121	102.82%	2.82%							
	2012/13	\$1,629.64	2012	238.985	102.08%	2.08%							
	2013/14	\$1,634.43	2013	244.675	102.38%	2.38%							
	2014/15	\$1,640.97	2014	251.495	102.79%	2.79%							
	2015/16	\$1,635.38	2015	257.622	102.44%	2.44%							
	2016/17	\$1,639.53	2016	264.565	102.70%	2.70%							
	2017/18	\$1,656.93	2017	274.589	103.79%	3.79%							
	2018/19	\$1,647.84	2018	283.422	103.22%	3.22%							
	2019/20	\$1,660.45	2019	294.801	104.01%	4.01%							
	2020/21		2020				April CPI published in early June						

				Jul '19 - Apr 20	FY20 Projection
Expense					
	Contractual and Other Services				
	626.000 · Landscape Services			12,218	14,662
	Total Contractual and Other Services			12,218	14,662
	Utilities and Misc. Expenses				
	642.000 · Electricity			549	659
	643.001 · Water			1,596	1,915
	Total Utilities and Misc. Expenses			2,146	2,575
	Maint. & Repair Services				
	760.000 · Grounds Maint. - Outside			2,408	2,890
	Total Maint. & Repair Services			2,408	2,890
	Fund Transfer				
	Transfer G&A Expenses				
	Valle Vista Landscape Dist			567	680
	Total Transfer G&A Expenses			567	680
	Total Fund Transfer			567	680
	Total Expense			17,339	20,807

PART C VALLE VISTA

LIGHTING AND LANDSCAPING MAINTENANCE DISTRICT No. 1

Assessment 2021-2022

ASSESSMENT NO.	OWNER	ASSESSOR'S PARCEL NO.	ASSESSMENT Per UNIT	ASSESSMENT UNITS	FISCAL YEAR
					2021-2022 ASSESSMENT TOTAL
1	Adriana Martin	002-600-019-0	\$ 618.94	1	\$ 618.94
2	Zooney Diggory & David M. Lo	002-600-018-0	\$ 773.68	1.25	\$ 773.68
3	Germain R & Wanda M. Guibert	002-600-017-0	\$ 773.68	1.25	\$ 773.68
4	Steve F & Mary M Woodill	002-600-016-0	\$ 773.68	1.25	\$ 773.68
5	Stephen T Sesody	002-600-015-0	\$ 773.68	1.25	\$ 773.68
6	Joanne Neubauer	002-600-014-0	\$ 618.94	1	\$ 618.94
7	Linda Thomas	002-600-013-0	\$ 618.94	1	\$ 618.94
8	Don & Sharon Gerber	002-600-012-0	\$ 618.94	1	\$ 618.94
9	William M & Rosemary Y Hernandez	002-600-011-0	\$ 618.94	1	\$ 618.94
10	Michael Humphrey & Joan Rodgers	002-600-035-0	\$ 618.94	1	\$ 618.94
11	Nathalie Godoy & Augustine Rojas	002-600-010-0	\$ 618.94	1	\$ 618.94
12	Isaias & Claudia Lona	002-600-034-0	\$ 618.94	1	\$ 618.94
13	Phillip Esparza & Yolanda Lopez	002-600-009-0	\$ 618.94	1	\$ 618.94
14	Guillermo E & Georgesse Gomez	002-600-033-0	\$ 618.94	1	\$ 618.94
15	Marion and Alfredo Torres	002-600-008-0	\$ 618.94	1	\$ 618.94
16	Steven T lo et ux	002-600-032-0	\$ 618.94	1	\$ 618.94
17	John V & Cynthia J Alnas	002-600-007-0	\$ 618.94	1	\$ 618.94
18	Kent Penning	002-600-031-0	\$ 618.94	1	\$ 618.94
19	Randal R. Phelps	002-600-006-0	\$ 618.94	1	\$ 618.94
20	Alex & Marta Gorelik	002-600-030-0	\$ 618.94	1	\$ 618.94
21	David & Julie Koesel	002-600-005-0	\$ 618.94	1	\$ 618.94
22	Diana Robbins & Aaron Bettencourt	002-600-029-0	\$ 618.94	1	\$ 618.94
23	Kristy Jensen	002-600-004-0	\$ 618.94	1	\$ 618.94
24	Darlene R. Anger Living Trust	002-600-003-0	\$ 618.94	1	\$ 618.94
25	Juan J Briano	002-600-002-0	\$ 618.94	1	\$ 618.94
26	Lincoln & Diane Beeman	002-600-001-0	\$ 618.94	1	\$ 618.94
27	Kenneth J Houle	002-600-028-0	\$ 618.94	1	\$ 618.94
28	Martinet Family Trust	002-600-027-0	\$ 618.94	1	\$ 618.94
29	Michael Urbani & Lindsey Pengelly	002-600-026-0	\$ 618.94	1	\$ 618.94
30	Kathy M Dutra	002-600-025-0	\$ 618.94	1	\$ 618.94
31	Douglas & Leanna Brothers	002-600-024-0	\$ 618.94	1	\$ 618.94
32	Harold Gomes	002-600-023-0	\$ 618.94	1	\$ 618.94
33	Manuel Solis	002-600-022-0	\$ 618.94	1	\$ 618.94
34	James & Iraida Ptsano	002-600-021-0	\$ 618.94	1	\$ 618.94
35	Curtis Smith & Mishele New kirk	002-600-020-0	\$ 618.94	1	\$ 618.94
			\$ 22,281.86	36	\$ 22,281.86

Significant Cost Savings at what benefit?

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

Example, tree trimming is not in the budget - \$5,000 annual expense; trees have not been trimmed

Reserves- establishing a 150% reserve amount? $\$21,000 + \$10,500 = \$31,500$ (a light pole could cost this much) **FY 20/21 Fund Balance is \$80,000**

Current reserves can be used to pay for tree trimming and other eligible costs

Other needs? (paint the gazebo?)