



In order to annex to a maintenance Community Facilities District, the following steps and information must be provided.

PLEASE SUBMIT THE FOLLOWING INFORMATION LISTED BELOW:

- ☐ Cover Letter
- ☐ Special District Application
- ☐ Development Quantities Form
- ☐ Signed Petition / Waiver Form
- ☐ Acknowledgement Form
- ☐ Approved Tract Map or Parcel Map for Project
- ☐ Conditions of Approval for the Project
- ☐ Legal Description
- ☐ Maintenance Exhibit identifying CFD and HOA Maintained Areas
- ☐ Title Report prepared within three months of the submittal date
- ☐ Check Payable to the City of San Bernardino

Deposit Amount

A \$15,000 flat fee is required at the time of document submittal. If the initial deposit is not sufficient to cover the cost of the annexation, an additional deposit may be required from the developer/owner. For additional information regarding the deposit requirement amount please contact the Real Property Division, directly at:

Email: realproperty@sbcity.org

Phone: (909) 384-5366

In order to process your application, all documents need to be completed accompanied with a check payable to the City of San Bernardino. Failure to complete these steps will result in a determination of incomplete application and will delay the processing of your application.

If you have questions please contact our Special Tax Consultant, Spicer Consulting Group at (866) 504-2067.

Thank you,
City of San Bernardino
Real Property Division

Real Property Division
City of San Bernardino
201 North "E" Street
San Bernardino, CA 92401

RE: Maintenance Community Facilities District Annexation

Tract No. / Project No. _____
Assessor's Parcel Number (APN) _____

To whom it may concern,

We are submitting the attached Application Form and supporting materials in connection with our request to **annex** territory into a **maintenance** Community Facilities District. The **annexation** would provide the following services including but not limited to: maintenance of landscape and lighting of parks, parkways, streets, roads and open spaces, maintenance and operation of storm drainage facilities, **graffiti removal** and other public or private services permitted in the area surrounding the subject project.

Enclosed with this letter are the following documents required to initiate the **annexation** process:

- Annexation Application
- Description of the project or development
- Development Quantities Form
- Acknowledgment Form
- Approved Tract Map or Parcel Map for Project
- Conditions of Approval for the Project
- Legal Description
- Maintenance Exhibit identifying CFD and HOA Maintained Areas
- Title Report prepared within three months of the submittal date
- Check Payable to the City of **San Bernardino**

We appreciate your consideration of our application and look forward to proceeding with the proposed Maintenance CFD **Annexatoin** with the City of **San Bernardino**. In the meantime, if you have any questions or need additional information, please do not hesitate to contact me at (XXX) XXX-XXXX ext. XXX.

Sincerely,

John Doe

John Doe
Project Manager



SPECIAL FUNDING DISTRICT APPLICATION FORM CFD 2019-1

Proposed Special District: ☐ AD ☐ CFD

Proposed Name of Project: _____

SPICER CONSULTING GROUP USE ONLY

Date Received: _____

Amount: _____

Proposed Special District Number: _____

DEPOSIT REQUIREMENTS

Total deposit of \$15,000 is required at the time the application is submitted. The deposit is non-refundable.

1. IDENTIFICATION OF SUBJECT PROPERTY

Description of Property (include N, S, E &/or W, borders, acreage & tract number)

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A. APN(s) and/or Master Parcel Number
Attach Backup (if needed)

Include all Assessor Parcel Numbers to be included in the Special District **in their entirety (XXXX-XXX-XX-XX)**

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

B. Tract/Tentative Tract Map Number
Enclose copy of map

C. Recorded Lot Line Adjustments
Enclose copy of document(s)

D. Mapping Status

☐ Approved

☐ Tentative

E. Environmental Permits Required

☐ Yes

☐ No

F. Status of Permits

☐ Application in Process

G. Conditions of Approval Required

☐ Yes

☐ No

By Whom _____

H. Status of Conditions

☐ In Process

☐ Completed

2. PROPERTY OWNER INFORMATION (Attach Grant Deed)

- A. Landowner Name(s)
Attach Backup (if needed) _____
- B. Contact Name _____
- C. Title _____
- D. Mailing Information _____
- E. Phone _____
- F. Fax _____
- G. E-Mail _____

3. CONSULTANT/APPLICANT INFORMATION

- A. Company Name _____
- B. Contact Name _____
- C. Title _____
- D. Mailing Information _____
- E. Phone _____
- F. Fax _____
- G. E-Mail _____

4. ENGINEERING INFORMATION

- A. Company Name _____
- B. Contact Name _____
- C. Title _____
- D. Mailing Information _____
- E. Phone _____
- F. Fax _____
- G. E-Mail _____

5. PROJECT LAND USE (Per Improvement Area or Zone, When Applicable)

- A. Number of Taxable Units _____
- B. Proposed Product Mix See below
- C. Base Sale Price Information See below
- D. Number of Taxable Acres
Attach Backup _____
- E. Number of Exempt Acres
Attach Backup _____
- F. Desired Tax Rate Burden _____ %
- G. Anticipated Absorption _____ *per month*

6. COMPOSITION OF DEVELOPABLE ACREAGE

Attach Additional Backup (if needed)

Project Address	Acres	Use	Commence Occupancy (Quarter & Year)
Residential			
Commercial-Retail			
Business Park			
School Site			

PROPOSED RESIDENTIAL PRODUCT MIX

Plan Number	1	2	3	4
Apartment, Attached, or Detached				
Number of Units				
Average Lot Size	<i>sq. ft.</i>			
Prices				
Square Footage of Living Area				

Occupancies (See Table Below)

Quarter & Year	Plan 1	Plan 2	Plan 3	Plan 4

7. FINANCING STRUCTURES OFFERED TO HOMEBUYERS

☐ FHA ☐ VA ☐ VARIABLE

☐ OTHER

8. FINANCING MECHANICS

A. Preparation of Boundary Map

Attach if possible

B. Preparation of RMA

Attach if possible

C. Proposed JCFA's

Agency Name

Funding Purpose (i.e. fees, facilities)

Name

Contact Name

Mailing Address

Phone

Fax

Email

Agency Name

Funding Purpose (i.e. fees, facilities)

Name

Contact Name

Mailing Address

Phone

Fax

Email

D. Additional Land Secured Financings Proposed

Agency Name & Backup

E. Overlapping Land Secured Financings

List all existing special taxes, assessments, & liens as well as agency name(s) *

F. Improvement Area(s)/Zone(s)

☐ Yes ☐ No

G. Basis for Either

H. Initial Levy Fiscal Year

I. Final Levy Fiscal Year (Anticipated)

J. Proposed Capitalized Interest

Months

K. Proposed Facilities Costs

Breakout Between Improvement Area(s)/Zone(s) & Type of Facility/Agency

L. Summary of Proposed Methodology

Proposed Land Use Categories & Method of Apportionment

Questions? Contact our Special Tax Consultant, Spicer Consulting Group at 866-504-2067. Thank you.

* Attach backup as needed

CITY OF SAN BERNARDINO
MAINTENANCE CFD
QUANTITY WORKSHEET



Applicant	Development Name	Tract No.	Res/Comm
	Gross Acres	Net Acres	Units

Total Units	0
Net Acres	0.00

	Description	Measure	Unit Cost	CFD	Total	HOA	Total	Grand Total
Landscaping	Street Frontage, Medians	SF						
	Parkways	SF						
	Slopes	SF						
	Open Space - Street Scape	SF						
	Open Space - Fuel Mod (Non-Irrigated)	SF						
	Trees	Qty						
	Subtotal				\$0.00		\$0.00	\$0.00
Lighting	8,000 Lumen, LPSV	Qty						
	22,500 Lumen, LPSV	Qty						
	Traffic Signal	Qty						
	Other Types	Qty						
	Subtotal				\$0.00		\$0.00	\$0.00
Streets	Street Sweeping- Interior	LF						
	Street Sweeping- Perimeter	LF						
	Sidewalks - (20 year replacement)	SF						
	Pavement Management	SF						
	Subtotal				\$0.00		\$0.00	\$0.00
Drainage	Detention/Debris Basin	SF						
	Storm Drains Pipe	LF						
	Curb Inlet Catch Basin	EA						
	Bioretention Facility	EA						
	Infiltration Trench	EA						
	Other Types	Qty						
	Subtotal				\$0.00		\$0.00	\$0.00
Parks	Community	Acre						
	Neighborhood	Acre						
	Subtotal				\$0.00		\$0.00	\$0.00
Trails	DG	SF						
	Pavement	SF						
	Subtotal				\$0.00		\$0.00	\$0.00
Graffiti	Abatement	Unit						
	Subtotal				\$0.00		\$0.00	\$0.00

Total Direct Costs		\$0.00		\$0.00	\$0.00
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Soft Costs	Description		Total		Total	
	Reserves					
	Administration					
	Total	Total Indirect Costs	\$0.00		\$0.00	\$0.00

Grand Total		\$0.00		\$0.00	\$0.00
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**PETITION TO THE CITY COUNCIL OF THE CITY OF SAN BERNARDINO
REQUESTING ANNEXING TERRITORY INTO A COMMUNITY FACILITIES DISTRICT
NO. 2019-1 OF THE CITY OF SAN BERNARDINO AND A WAIVER WITH RESPECTS
TO CERTAIN PROCEDURAL MATTERS UNDER THE MELLO-ROOS COMMUNITY
FACILITIES ACT OF 1982 AND CONSENTING TO THE LEVY OF SPECIAL TAXES
THEREON TO PAY THE COSTS OF SERVICES TO BE PROVIDED BY THE
COMMUNITY FACILITIES DISTRICT**

1. The undersigned requests that the City Council of the City of San Bernardino (the "City"), initiate and conduct proceedings pursuant to the Mello-Roos Community Facilities Act of 1982 (the "Act") (Government Code Section 53311 et seq.), to annex territory into Community Facilities District No. 2019-1 (Maintenance Services) (the "Community Facilities District") of the property described below and consents to the annual levy of special taxes on such property to pay the costs of services to be provided by the community facilities district.

2. The undersigned requests that the community facilities district provide any services that are permitted under the Act including, but not limited to, all necessary service, operations, administration and maintenance required to keep the landscape lighting, street lighting, traffic signals, flood control facilities, ground cover, shrubs, plants and trees, irrigation systems, graffiti removal, sidewalks and masonry walls, fencing entry monuments, tot lot equipment and associated appurtenant facilities within the district in a healthy, vigorous and satisfactory working condition.

3. The undersigned hereby certifies that as of the date indicated opposite its signature, it is the owner of all the property within the proposed boundaries of the Community Facilities District as described in Exhibit A hereto and as shown on the map Exhibit B hereto.

4. The undersigned requests that a special election be held under the Act to authorize the special taxes for the proposed community facilities district. The undersigned waives any requirement for the mailing of the ballot for the special election and expressly agrees that said election may be conducted by mailed or hand-delivered ballot to be returned as quickly as possible to the designated election official, being the office of the City Clerk and the undersigned request that the results of said election be canvassed and reported to the City Council at the same meeting of the City Council as the public hearing on the creation of the Community Facilities District or at the next available meeting.

5. Pursuant to Sections 53326(a) and 53327(b) of the Act, the undersigned expressly waives all applicable waiting periods for the election and waives the requirement for analysis and arguments relating to the special election, and consents to not having such materials provided to the landowner in the ballot packet, and expressly waives any requirements as to the form of the ballot. The undersigned expressly waives all notice requirements relating to hearings and special elections (except for published notices required by the Act), and whether such requirements are found in the California Elections Code, the California Government Code or other laws or procedures, including but not limited to any notice provided for by compliance with the provisions of Section 4101 of the California Elections Code. The undersigned expressly waives the word limit requirement for the ballots pursuant to Sections 13247 and 9051 of the Elections Code.

6. The undersigned hereby acknowledges and agrees that the measure submitted in connection with the special election referred to herein, as set forth in the ballot provided to the undersigned, asked voters whether or not the Community Facilities District should be authorized to levy a special tax in order to finance services (the

"Services"), as specified in the Resolution No. 2019-081, adopted by the City Council of the City on June 5, 2019 (the "Resolution of Formation"). The Resolution of Formation described the Services to be financed by the Community Facilities District. The Rate and Method of Apportionment of the Special Tax for the Community Facilities District (the "Rate and Method") is included in the ballot materials provided to the undersigned for the election (the "Ballot"). The Rate and Method contains detailed provisions specifying (i) the type of the Special Tax and the amount or rate of the Special Tax to be levied on each parcel of property in the Community Facilities District, (ii) the duration of the Special Tax (the fiscal year after which the Special Tax will no longer be levied), and (iii) the use of the revenue derived from the Special Tax to pay for the Services. The undersigned, having received and reviewed the Rate and Method and the Ballot will be, at the time it votes on the measure submitted to voters in the Ballot, in possession the type and amount or rate of the Special Tax, the duration of the Special Tax and the use of the revenue derived from the Special Tax, is fully informed with respect thereto and has a thorough understanding thereof.

7. The undersigned hereby consents to and expressly waives any and all claims based on any irregularity, error, mistake or departure from the provisions of the Act or other laws of the State and any and all laws and requirements incorporated therein, and no step or action in any proceeding relative to annexing territory into Community Facilities District No. 2019-1 of the portion of the incorporated area of the City of San Bernardino or the special election therein shall be invalidated or affected by any such irregularity, error mistake or departure.

IN WITNESS WHEREOF, I hereunto set my hand this ____ day of _____, 20____.

[NAME OF LANDOWNER]

By: _____

Name:

Title:

OWNER'S PROPERTY:

TRACT MAP OR PARCEL MAP NO.

or PROJECT NO. _____

OWNER'S MAILING ADDRESS:

FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY COUNCIL OF THE CITY OF
SAN BERNARDINO THIS ____ DAY OF _____, 20____.

City Clerk of the City Council of the
City of San Bernardino

INSERT EXHIBIT A: BOUNDARY DESCRIPTION

INSERT EXHIBIT B: TRACT/PARCEL/SUBDIVISION MAP

Acknowledgment Regarding Property to be Included into Community Facilities District No. _____

The developer/property owner of (Tract No. / Assessor's Parcel No.) _____
hereby acknowledges that:

If the landscaping, drainage, lighting and eligible public improvements within the Community Facilities District No. _____ the maintenance areas of **(Assessor's Parcel Nos.)** _____, which is to be included in the Community Facilities District No. _____ of the City of **San Bernardino** are completed prior to the levy and collection of special taxes upon property within said tract for the maintenance of such landscape and improvements, the developer/property owner will continue to be responsible for and will maintain the landscaping, drainage, lighting, and eligible public improvements within such maintenance areas at its sole expense, and the City will not assume responsibility for the maintenance of such landscaping, drainage, lighting and eligible public improvements until such time as the City is able to collect such special taxes to pay the costs of the maintenance of such landscaping, drainage, lighting, and eligible public improvements.

DATED:

OWNER(S):

(Print Name)

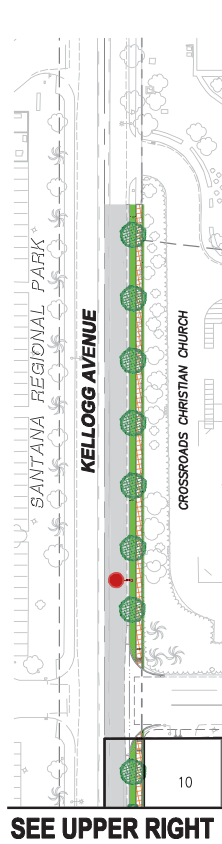
(Signature)

(Title)

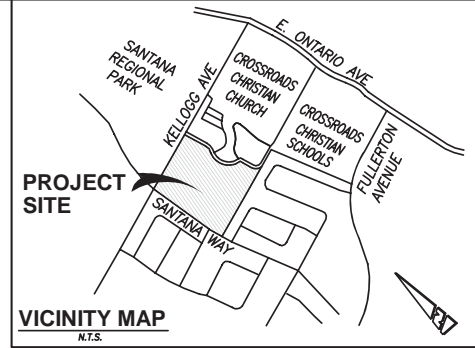
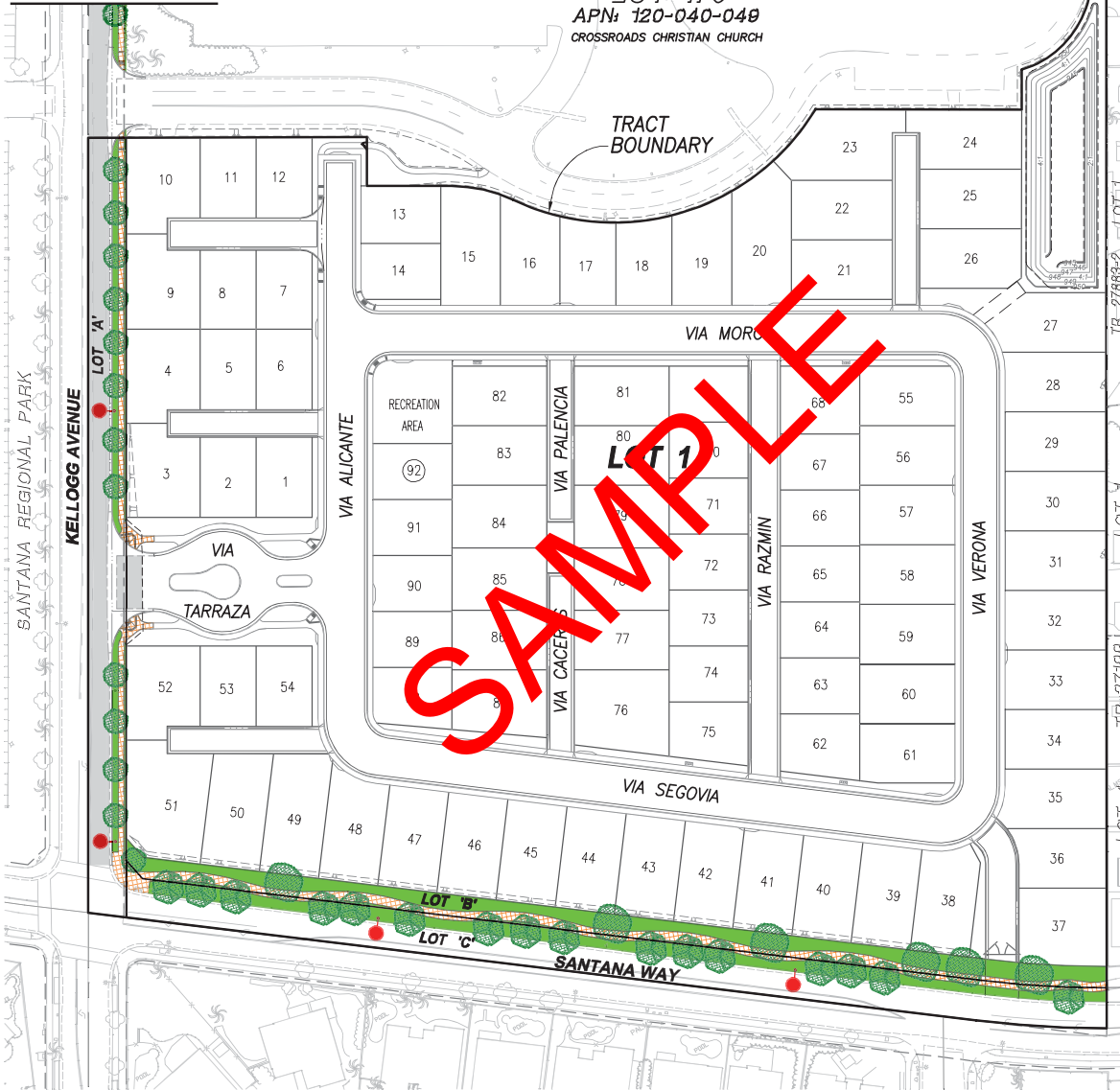
(Print Name)

(Signature)

(Title)



SEE LOWER LEFT



CFD MAINTENANCE AREA

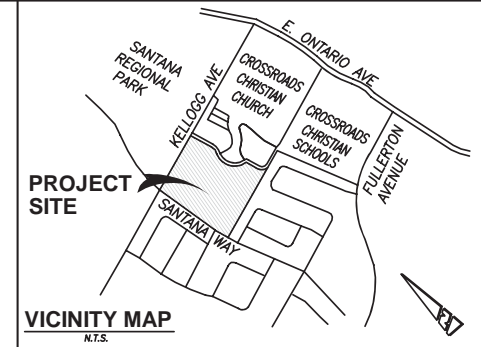
	STREET	19,316 SF = 0.44 AC
	SIDEWALK	12,057 SF = 0.28 AC
	STREETSCAPE	23,789 SF = 0.55 AC
	STREET TREE	42 EA
	STREET LIGHT CITY STD. 503	5 EA

**VALENCIA & SEVILLE
 TENTATIVE TRACT MAP NO. 37057
 CFD MAINTENANCE
 SITE PLAN EXHIBIT**

**SHEET 1
 OF 1**

DATE: 3/21/17





HOA MAINTENANCE AREA

	INTERIOR STREETS	105,923 SF = 2.43 AC
	INTERIOR SIDEWALK	18,914 SF = 0.43 AC
	STREETSCAPE FRONTAGE	15,749 SF = 0.36 AC
	NEIGHBORHOOD PARK	4,572 SF = 0.10 AC
	WATER QUALITY BASIN	12,217 SF = 0.28 AC
	STORM DRAIN PIPE	1,370 LF
	CURB INLET	8 EA
	STORM DRAIN OUTLET	2 EA
	STREET LIGHT CITY STD. 502	16 EA

**VALENCIA & SEVILLE
 TENTATIVE TRACT MAP NO. 37057
 HOA MAINTENANCE
 SITE PLAN EXHIBIT**

**SHEET 1
 OF 1**

DATE: 3/8/17