

CITY OF SANTA CLARITA

ENGINEER'S ANNUAL LEVY REPORT OPEN SPACE MAINTENANCE DISTRICT (GOLDEN VALLEY RANCH)

FISCAL YEAR 2010/2011



Intent Meeting: 6/8/2010
Public Hearing: 6/22/2010



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CITY OF SANTA CLARITA
OPEN SPACE MAINTENANCE DISTRICT
(GOLDEN VALLEY RANCH)

ENGINEER'S REPORT
CERTIFICATES

This Report describes the District including the improvements, budgets, parcels and assessments to be levied for fiscal year 2010/2011, as they existed at the time of the passage of the Resolution of Intention. Reference is hereby made to the Los Angeles County Assessor's maps for a detailed description of the lines and dimensions of parcels within the District. The undersigned respectfully submits the enclosed Report as directed by the City Council.

Dated this 20th day of May, 2010.



Willdan Financial Services
Assessment Engineer

By: Stacey Reynolds
Stacey Reynolds
Project Manager, District Administration Services

By: Richard Kopecky
Richard Kopecky
R. C. E. # 16742

I HEREBY CERTIFY that the enclosed Engineer's Report, together with Assessment Roll and Assessment Diagram thereto attached was filed with me on the _____ day of _____, 2010.

By: _____
Sarah Gorman, Esq.
City Clerk
City of Santa Clarita
Los Angeles County, California

I HEREBY CERTIFY that the enclosed Engineer's Report, together with Assessment Roll and Assessment Diagram thereto attached was approved and confirmed by the City Council of the City of Santa Clarita, California, on the _____ day of _____, 2010.

By: _____
Sarah Gorman, Esq.
City Clerk
City of Santa Clarita
Los Angeles County, California

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Introduction

The "Report" consists of five (5) parts as follows:

PART A – PLAN AND SPECIFICATIONS

Contains a description of the improvements that are to be maintained or serviced by the District.

PART B – ESTIMATE OF COST

Identifies the estimated cost of the services or maintenance to be provided by the District, including incidental costs and expenses in connection therewith.

PART C – METHOD OF APPORTIONMENT

Describes the basis on which the costs have been apportioned to each parcel of land within the Maintenance District, in proportion to the estimated benefits to be received by such lots and parcels.

PART D – ASSESSMENT ROLL

Identifies the maximum assessment to be levied on each benefited lot or parcel of land within the Maintenance District.

PART E – ASSESSMENT DIAGRAM

Contains a Diagram of the Maintenance District Boundaries showing the exterior boundaries of the Maintenance District, the boundaries of any zones within the Maintenance District and the lines and dimensions of each lot or parcel of land within the Maintenance District.

Part A — Plans and Specifications

The existing improvements, which have been constructed within the City of Santa Clarita, and those additional improvements that may be subsequently constructed, and that are proposed to be serviced and maintained as generally described as follows:

Description of Improvements

The improvements proposed to be maintained and serviced are generally described as the Conservation Easement area, as described in the Judgment of the Superior Court of the State of California Case No. BC269070, filed July 29, 2002, which is the open space area on Tentative Tract Map No. 52414 (Golden Valley Ranch).

Improvements include but are not limited to: trail maintenance and open space management within the boundaries of said Maintenance District.

The District will fund costs in connection with the District maintenance and servicing including, but not limited to, labor, electrical energy, water, materials, contracting services, administration, and other expenses necessary for the satisfactory maintenance and servicing of these improvements.

Maintenance means the furnishing of services and materials for the ordinary and usual operation of natural open space land or replacement of all or part of any of the landscaping or appurtenant improvements; the removal of rubbish, debris and other solid waste; the cleaning and other improvements to remove or cover graffiti; and trail maintenance.

Servicing means the administration of all aspects of the maintenance and servicing of the improvements.

Plans and specifications for the improvements, showing the general nature, location and the extent of the improvements, are on file at the City where they are available for public inspection and are by reference herein made a part of this report.

Part B — Estimate of Cost

The estimated costs for the operation, maintenance and servicing of the facilities, shown below, are the estimated costs of maintenance if the facilities were fully maintained for Fiscal Year 2010-11. The 1972 Act provides that the total cost of the maintenance and services, together with incidental expenses, may be financed from the assessment proceeds. The incidental expenses may include engineering fees, legal fees, printing, mailing, postage, publishing, and all other related costs identified with the district proceedings.

Maintenance & Servicing Costs	
Natural Open Space & Trails	\$39,000
Administration Costs	<u>5,525</u>
	\$44,525
Operating and Capital Reserve	\$181,950
Interest (positive)	(3,000)
Prior Year (surplus) or deficit	<u>(158,517)</u>
Total Assessment	\$64,958

The 1972 Act requires that a special fund be set-up for the revenues and expenditures of the District. Funds raised by assessment shall be used only for the purpose as stated herein. The City may advance funds to the District, if needed, to ensure adequate cash flow, and will be reimbursed for any such advances upon receipt of assessments. Any surplus or deficit remaining on July 1 must be carried over to the next fiscal year.

Part C — Method of Apportionment of Assessment

General

Part 2 of Division 15 of the Streets and Highways Code, the Landscaping and Lighting Act of 1972, permits the establishment of Maintenance Districts by cities for the purpose of providing certain public improvements which include the construction, maintenance and servicing of street lights, traffic signals and landscaping facilities.

Section 22573, Landscaping and Lighting Act of 1972 requires that maintenance assessments be levied according to benefit rather than according to assessed value. This section states:

"The net amount to be assessed upon lands within an Maintenance District may be apportioned by any formula or method which fairly distributes the net amount among all assessable lots or parcels in proportion to the estimated benefits to be received by each such lot or parcel from the improvements."

The Act permits the designation of zones of benefit within any individual Maintenance District if "by reason of variations in the nature, location, and extent of the improvements, the various areas will receive different degrees of benefit from the improvements." (Sec. 22574). Thus, the 1972 Act requires the levy of a true "assessment" rather than a "special tax."

Reason for the Assessment

The assessment is proposed to be levied to defray the costs of the maintenance and servicing of the open space conservation area improvements, as previously defined herein in Part A of this Report.

Special Benefit Analysis

Parcels within the District will be assessed for the maintenance of those improvements that provide a special benefit to the project. Article XIIIID of the California Constitution defines special benefit as:

"A particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large. General enhancement of property value does not constitute 'special benefit'."

Per the Judgment of the Superior Court of the State of California Case No. BC269070, filed July 29, 2002, the setting aside and on-going maintenance of natural open space areas is a condition of developing the residential portion of Tentative Tract No. 52414 (Golden Valley Ranch).

Without the open space areas, residential development would not be allowed to occur within the boundaries of the Tentative Tract; therefore, all real property proposed to be developed for residential uses receive and are conferred a particular and distinct special benefit from these open

space areas and their maintenance. Non-residential properties are not subject to this condition and therefore do not receive special benefit from the improvements. The general benefits associated with these open space areas and their maintenance are considered incidental, negligible and nonquantifiable.

Assessment Apportionment and Rates

As stated above, only residential property receives special benefits for the on-going maintenance of the designated open space within Tentative Tract No. 52414 (Golden Valley Ranch). There are 142.05 net acres of land designated for residential development within the tentative tract. The special benefit to each residential acre of land is the same: the ability to develop. Therefore, the assessment is apportioned to the residential development areas on a per acre basis.

$$\$64,958 / 142.05 \text{ acres} = \$457.29 / \text{acre}$$

The table below provides the projected assessment apportionment for the two types of planned residential unit areas within the Golden Valley Ranch development and shows the estimated maximum annual assessment rate per residential unit given the following assumptions. These rates are based on the following development scheme:

129.89 acres currently designated for 404 single family residential (SFR) units,
12.16 acres currently designated for 95 single family condominium (CON) units

Maximum FY 09-10 Assessment Per Res. Acre	Maximum FY 10-11 Assessment Per Res. Acre	Res. Acres	Actual FY 10-11 Assessment Per Res. Acre	Actual Total FY 10-11 Assessment	Projected Planned Res. Units	Est. Projected Max. FY 10-11 Assessment Rate per Residential Unit
\$448.77 / acre	\$457.29 / acre	129.89	\$457.29 / acre	\$59,396.08	404 SFR	\$147.02 / SFR Unit
\$448.77 / acre	\$457.29 / acre	12.16	\$457.29 / acre	\$5,562.20	95 CON	\$58.53 / CON Unit
CPI Increase = 1.9%		142.05		\$64,958.28		

If the number of residential units differs from those projected above, the maximum assessment rates per residential unit will also differ.

The maximum annual maintenance assessment rates will be increased each year by the annual change in the Consumer Price Index (CPI), during the preceding year ending in February, for All Urban Consumers, for the Los Angeles, Los Angeles and Orange County areas.

The actual assessments levied in any fiscal year will be as approved by the City Council and may not exceed the maximum assessment rate without receiving property owner approval for the increase.

Part D — Assessment Roll

The Assessment Roll is a listing of the proposed assessment for Fiscal Year 2010-11 apportioned to each lot or parcel, as shown on the last equalized roll of the Assessor of the County of Los Angeles. The Assessment Roll is provided below and is incorporated herein.

The description of each lot or parcel is part of the records of the Assessor of the County of Los Angeles and these records are, by reference, made part of this Report.

The proposed residential development areas are included within the following list of parcels that make up Tentative Tract Map No. 52414 (Golden Valley Ranch).

Assessor's Parcel Number	Land Use	Planned Dwelling Units	Parcel's Acreage	FY10/11 Assessment
2841-017-047	CNDOV	336	121.13	\$40,994.02
2841-059-001	SFV	1	0.18	147.02
2841-059-002	SFV	1	0.15	147.02
2841-059-003	SFV	1	0.15	147.02
2841-059-004	SFV	1	0.15	147.02
2841-059-005	SFV	1	0.15	147.02
2841-059-006	SFV	1	0.15	147.02
2841-059-007	SFV	1	0.14	147.02
2841-059-008	SFV	1	0.13	147.02
2841-059-009	SFV	1	0.13	147.02
2841-059-010	SFV	1	0.14	147.02
2841-059-011	SFV	1	0.15	147.02
2841-059-012	SFV	1	0.15	147.02
2841-059-013	SFV	1	0.14	147.02
2841-059-014	SFV	1	0.14	147.02
2841-059-015	SFV	1	0.14	147.02
2841-059-016	SFV	1	0.14	147.02
2841-059-017	SFV	1	0.14	147.02
2841-059-018	SFV	1	0.13	147.02
2841-059-019	SFV	1	0.13	147.02
2841-059-020	SFV	1	0.14	147.02
2841-059-021	SFV	1	0.15	147.02
2841-059-022	SFV	1	0.16	147.02
2841-059-023	SFV	1	0.14	147.02

Assessor's Parcel Number	Land Use	Planned Dwelling Units	Parcel's Acreage	FY10/11 Assessment
2841-059-024	SFV	1	0.14	147.02
2841-059-025	SFV	1	0.14	147.02
2841-059-026	SFV	1	0.18	147.02
2841-059-027	SFV	1	0.19	147.02
2841-059-028	SFV	1	0.19	147.02
2841-059-029	SFV	1	0.18	147.02
2841-059-030	SFV	1	0.22	147.02
2841-060-001	SFV	1	0.13	147.02
2841-060-002	SFV	1	0.12	147.02
2841-060-003	SFV	1	0.12	147.02
2841-060-004	SFV	1	0.12	147.02
2841-060-005	SFV	1	0.12	147.02
2841-060-006	SFV	1	0.12	147.02
2841-060-007	SFV	1	0.12	147.02
2841-060-008	SFV	1	0.13	147.02
2841-060-009	SFV	1	0.13	147.02
2841-060-010	SFV	1	0.12	147.02
2841-060-011	SFV	1	0.13	147.02
2841-060-012	SFV	1	0.13	147.02
2841-060-013	SFV	1	0.12	147.02
2841-060-014	SFV	1	0.12	147.02
2841-060-015	SFV	1	0.12	147.02
2841-060-016	SFV	1	0.12	147.02
2841-060-017	SFV	1	0.12	147.02
2841-060-018	SFV	1	0.18	147.02
2841-060-019	SFV	1	0.20	147.02
2841-060-020	SFV	1	0.15	147.02
2841-060-021	SFV	1	0.17	147.02
2841-060-022	SFV	1	0.14	147.02
2841-060-023	SFV	1	0.15	147.02
2841-060-024	SFV	1	0.15	147.02
2841-060-025	SFV	1	0.14	147.02
2841-060-026	SFV	1	0.14	147.02
2841-060-027	SFV	1	0.13	147.02
2841-060-028	SFV	1	0.13	147.02
2841-060-029	SFV	1	0.15	147.02

Assessor's Parcel Number	Land Use	Planned Dwelling Units	Parcel's Acreage	FY10/11 Assessment
2841-060-030	SFV	1	0.25	147.02
2841-060-031	SFV	1	0.21	147.02
2841-060-032	SFV	1	0.18	147.02
2841-060-033	SFV	1	0.18	147.02
2841-060-034	SFV	1	0.17	147.02
2841-060-035	SFV	1	0.17	147.02
2841-060-036	SFV	1	0.17	147.02
2841-060-037	SFV	1	0.17	147.02
2848-038-001	SFV	1	0.16	147.02
2848-038-002	SFV	1	0.14	147.02
2848-038-003	SFV	1	0.16	147.02
2848-038-004	SFV	1	0.18	147.02
2848-038-005	SFV	1	0.17	147.02
2848-038-006	SFV	1	0.15	147.02
2848-038-007	SFV	1	0.20	147.02
2848-038-008	SFV	1	0.18	147.02
2848-038-009	SFV	1	0.18	147.02
2848-038-010	SFV	1	0.19	147.02
2848-038-011	SFV	1	0.18	147.02
2848-038-012	SFV	1	0.16	147.02
2848-038-013	SFV	1	0.15	147.02
2848-038-014	SFV	1	0.16	147.02
2848-038-015	SFV	1	0.16	147.02
2848-038-016	SFV	1	0.21	147.02
2848-038-017	SFV	1	0.22	147.02
2848-038-018	SFV	1	0.18	147.02
2848-038-019	SFV	1	0.18	147.02
2848-038-020	SFV	1	0.19	147.02
2848-038-021	SFV	1	0.19	147.02
2848-038-022	SFV	1	0.16	147.02
2848-038-023	SFV	1	0.16	147.02
2848-038-024	SFV	1	0.19	147.02
2848-009-043	SFV	72	32.21	10,585.44
Total		499	167.52	\$64,958.28
Parcel Count				93

Part E — Assessment Diagram

An Assessment Diagram for the Maintenance District is provided on the following page.

The lines and dimensions of each lot or parcel within the Maintenance District are those lines and dimensions shown on the maps of the Assessor of the County of Los Angeles, for the year when this Report was prepared, and are incorporated by reference herein and made part of this Report.



