



**In order to annex territory into Community Facilities District No. 2018-1 (Safety Services), 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
- ☐ Approved Tract Map or Parcel Map for Project
- ☐ Conditions of Approval for the Project
- ☐ Legal Description
- ☐ Title Report prepared within three months of the submittal date
- ☐ Check Payable to the City of San Bernardino

**Deposit Amount**

For the deposit requirement amount please contact Barbara Whitehorn directly at:

Email: [Whitehorn\\_Ba@sbcity.org](mailto:Whitehorn_Ba@sbcity.org),

Phone: (909) 384-5345

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  
Finance Department

Ms. Barbara Whitehorn  
Finance Department  
City of San Bernardino  
290 North "D" Street  
San Bernardino, CA 92401

RE: Community Facilities District No. 2018-1 Annexation  
Tract No. / Project No. \_\_\_\_\_  
Assessor's Parcel Number (APN) \_\_\_\_\_

Dear Ms. Whitehorn,

We are submitting the attached Application Form and supporting materials in connection with our request to annex territory into Community Facilities District. 2018-1 (Public Safety). This would provide the following services including but not limited to, all necessary service, operations, administration and maintenance required to provide police protection services, including but not limited to criminal justice services, and ambulance services in the area surrounding the subject project.

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

- Annexation Application
- Development Quantities Form
- Approved Tract Map or Parcel Map for Project
- Conditions of Approval for the Project
- Legal Description
- 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 CFD Annexation 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

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 \$\_\_\_\_\_ required at time application is submitted. \$\_\_\_\_\_ 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)

LEVEL OF DEVELOPMENT		
Backup (if needed)	Acreage	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	sq. ft.			
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.**

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\* Attach backup as needed

**PETITION TO THE MAYOR AND CITY COUNCIL OF THE CITY OF SAN BERNARDINO REQUESTING TO ANNEX TERRITORY INTO COMMUNITY FACILITIES DISTRICT NO. 2018-1 WITHIN 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.), for the annexation of territory to Community Facilities District No. 2018-1 (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 required to provide police protection services, including but not limited to criminal justice services in the area surrounding the subject project.

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 annexation area to 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 annexation of territory to 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. 2018-239, adopted by the City Council of the City on August 15, 2018 (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 annex territory to the Community Facilities District 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**



**CFD 2018-1 Annexation Steps**

To complete an annexation to CFD No. 2018-1 (Safety Services) of the City of San Bernardino of any parcel subject to annexation, the following steps must be completed:

Step 1: Receipt of Annexation Application and Payment of Annexation Fee

Step 2: Determination of Property Ownership

Step 3: Preparation of Consent and Waiver Forms

Step 4: Preparation of Ballot Materials

Step 5: Obtain Registrar of Voters Certification from County

Step 6: Distribution of Consent and Waiver Forms and Ballot Materials

Step 7: Hold a Public Hearing and Canvass the Election

Step 8: Record the Annex Boundary Map and Notice of Special Tax Lien

For any questions regarding the process please contact Spicer Consulting Group at (866) 504-2067.