



**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. Any unused funds from the \$15,000 deposit may be returned to the developer/owner. If the initial deposit is not sufficient to cover the cost of the annexation, an additional deposit maybe required from the developer/owner. For additional information regarding the deposit requirement amount please contact Alex Qishta, directly at:

Email: [Qishta\\_AI@sbcity.org](mailto:Qishta_AI@sbcity.org),  
Phone: (909) 384-5242

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  
Department of Public Works

Mr. Alex Qishta  
Deputy Director of Public Works/City Engineer  
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) \_\_\_\_\_

Dear Mr. Qishta,

We are submitting the attached Application Form and supporting materials in connection with our request to **annex** territory into a **maintenance** Community Facilities District. This 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
- 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 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)

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*



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

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						
	<b>Subtotal</b>				\$0.00		\$0.00	\$0.00
Lighting	8,000 Lumen, LPSV	Qty						
	22,500 Lumen, LPSV	Qty						
	Traffic Signal	Qty						
	Other Types	Qty						
	<b>Subtotal</b>				\$0.00		\$0.00	\$0.00
Streets	Street Sweeping- Interior	LF						
	Street Sweeping- Perimeter	LF						
	Sidewalks - (20 year replacement)	SF						
	Pavement Management	SF						
	<b>Subtotal</b>				\$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						
	<b>Subtotal</b>				\$0.00		\$0.00	\$0.00
Parks	Community	Acre						
	Neighborhood	Acre						
	<b>Subtotal</b>				\$0.00		\$0.00	\$0.00
Trails	DG	SF						
	Pavement	SF						
	<b>Subtotal</b>				\$0.00		\$0.00	\$0.00
Graffiti	Abatement	Unit						
	<b>Subtotal</b>				\$0.00		\$0.00	\$0.00

<b>Total Direct Costs</b>					\$0.00		\$0.00	\$0.00
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Soft Costs	Description	Total	Total	Total
	Reserves			
	Administration			
	<b>Total</b>	<b>Total Indirect Costs</b>	\$0.00	\$0.00

<b>Grand Total</b>					\$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, 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.

6. 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)

\_\_\_\_\_

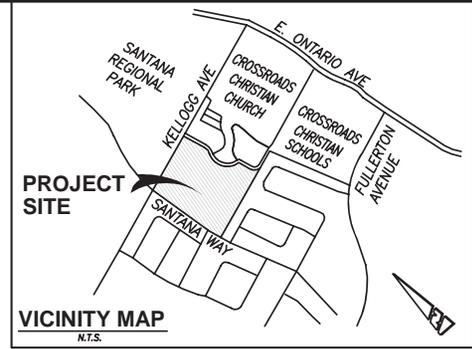
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SEE LOWER LEFT

LOT 170  
 APN: 120-040-049  
 CROSSROADS CHRISTIAN CHURCH

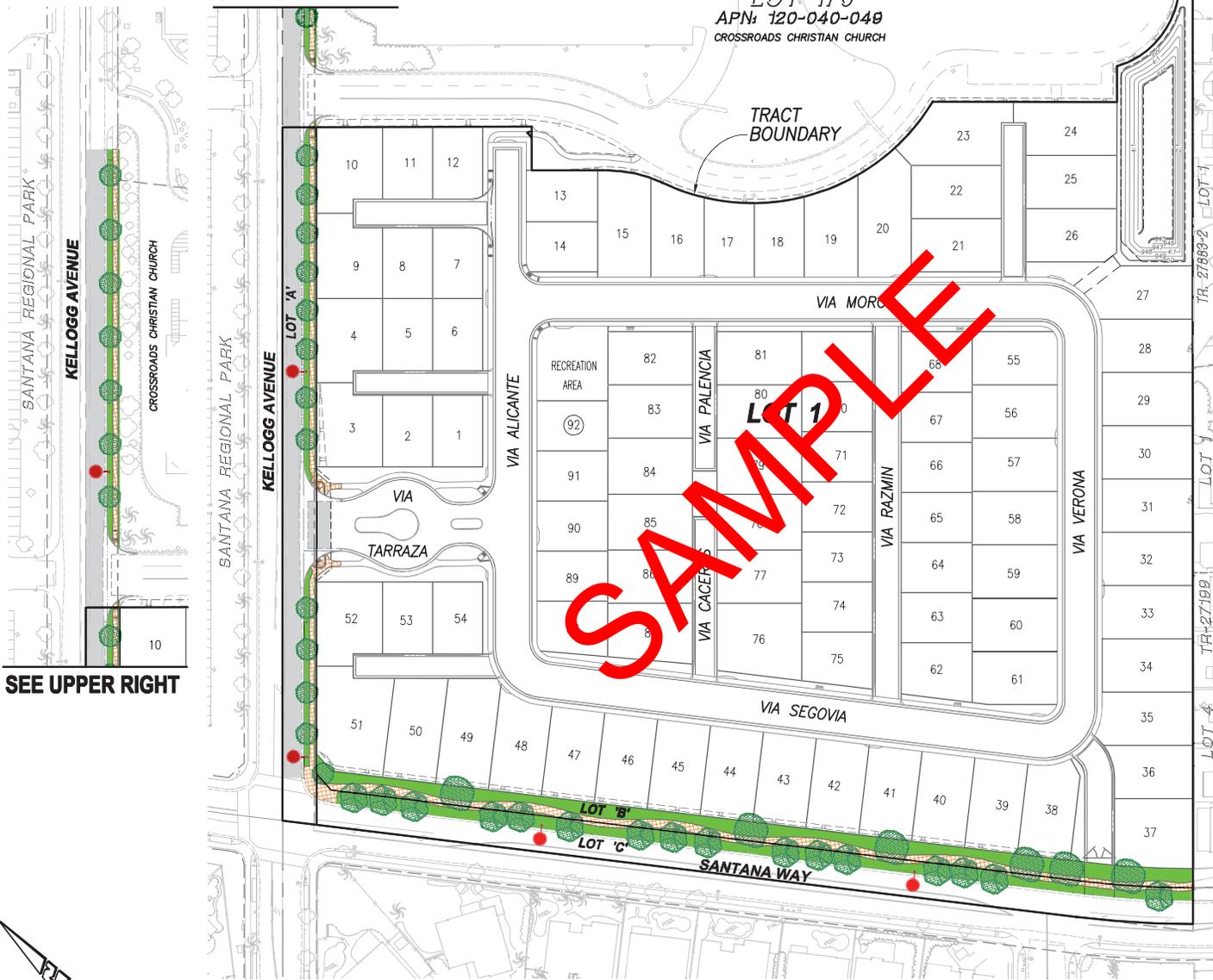
TRACT BOUNDARY



**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

SAMPLE



SEE UPPER RIGHT

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

SHEET **1**  
 OF **1**

DATE: 3/21/17



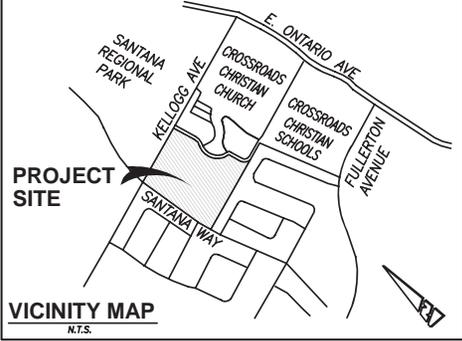
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**LOT 170**  
 APN: 120-040-049  
 CROSSROADS CHRISTIAN CHURCH

TRACT BOUNDARY

**LOT 1**

LOT 'A'  
 LOT 'B'  
 LOT 'C'



**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

N.T.S.