City of La Habra Heights Benefit Assessment District No. 5 (1982 Act)

Shauna Clark

The Science of Quantifying Special vs General Benefit

Pablo Perez
NBS

City of La Habra Heights
Benefit Assessment District No. 5
(1982 Act)

Shauna Clark

The Science of Quantifying Special vs General Benefit

Pablo Perez

NBS™


City & Community Background
How policy making has been impacted by the Propositions
Pre-Work

City & Community Background

- Less than 6,000 residents
- Rural w/minimum one-acre lots on hillsides or nested within wooded areas
- No schools, gas stations or grocery stores
- Only commercial property: Hacienda Golf Club and a small real estate office
- Resource production: oil and natural gas, but 90% of land is residential

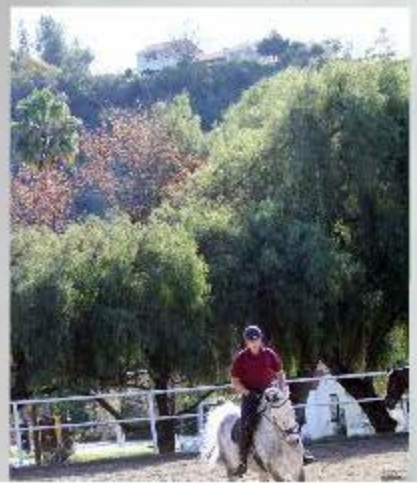


How Proposition 13 affected the City

How Council Members reacted and the need to educate them and the public on the concept of a "general benefit" contribution - and related Prop 218 challenges

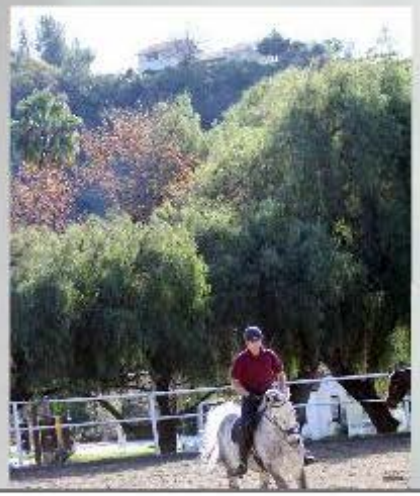
Background

- Less than 6,000 residents
- Rural w/minimum one-acre lots on hillsides or nestled within wooded areas
- No schools, gas stations or grocery stores
- Only commercial property: Hacienda Golf Club and a small real estate office
- Resource production: oil and natural gas, but 90% of land is residential



Background

- Less than 6,000 residents
- Rural w/minimum one-acre lots on hillsides or nestled within wooded areas
- No schools, gas stations or grocery stores
- Only commercial property: Hacienda Golf Club and a small real estate office
- Resource production: oil and natural gas, but 90% of land is residential



How Proposition 13 affected the City

- Many of the financial assumptions that had supported incorporation in 1978 were eliminated on the day that LHH became a city as Proposition 13 was on the same ballot. The property tax revenue base shrunk significantly.
- Without a diverse revenue base the city had to rely on residents to provide their own municipal services. Residents (mostly local farmers) served as the fire department. A resident-based Roads Committee brought out their own equipment to patch pavement and grade the many dirt roads that crisscrossed the city.
- Over the 35 years since incorporation, the city evolved from a community of equestrians and avocado farmers to one of large custom homes. The founders had assumed that new development would greatly expand the revenue base, however, both Prop 13 and Prop 218 which followed made that very unlikely.

nin wooded areas

l real estate office

s residential

Ho

imp

- Coincident w cutbacks incl
- The shadow c is one of few hauler has exc 218 neverthel franchise fees

Conditions that l Benefit Assessme

- The fourth of the City's decided to create Distric underfunded that the ro index. It was agreed that
- To that end the Roads Co achieve a higher paveme that were undermining th

How Proposition 13 affected the City

- Many of the financial assumptions that had supported incorporation in 1978 were eliminated on the day that LHH became a city as Proposition 13 was on the same ballot. The property tax revenue base shrunk significantly.

- Without a diverse revenue base the city had to rely on residents to provide their own municipal services. Residents (mostly local farmers) served as the fire department. A resident-based Roads Committee brought out their own equipment to patch pavement and grade the many dirt roads that crisscrossed the city.

- Without a diverse revenue base the city had to rely on residents to provide their own municipal services. Residents (mostly local farmers) served as the fire department. A resident-based Roads Committee brought out their own equipment to patch pavement and grade the many dirt roads that crisscrossed the city.

- Over the 35 years since incorporation, the city evolved from a community of equestrians and avocado farmers to one of large custom homes. The founders had assumed that new development would greatly expand the revenue base, however, both Prop 13 and Prop 218 which followed made that very unlikely.

Prop 218 impact

- Without sources of general revenue (e.g. property tax, sales tax, business licenses, etc.,) the City of La Habra Heights became dependent upon parcel taxes. In 1994 voters approved a fire tax by an overwhelming margin. This was an easy sell because LHH is classified as a severely high fire hazard area.

- Roads took a back seat to fire services until the Roads Committee convinced voters that a bond issue would put the city on the right track.

- In addition to the bond issue, residents approved four maintenance districts. At first, districts could be approved in the absence of majority protest. However, with the passage of Prop 218, the threshold for approval changed to a majority of votes cast.

How Proposition 13 affected the City

How policy making has been impacted by the Propositions

- Coincident with the 2007 recession, the City scaled back annual expenditures. Service cutbacks included a 20% reduction in patrol as well as a 30% staff cut.

- The shadow of Prop 218 hangs over the City at all times. For example, La Habra Heights is one of few cities in California that does not charge franchise fees though the refuse hauler has exclusivity. In general, city attorneys do not believe franchise fees fall under 218 nevertheless a plaintiff's attorney is filing cases against cities that impose or increase franchise fees without a Prop 218 election.

Conditions that led to the need for the renewal of the Benefit Assessment District in contrast to other funding needs.

- The fourth of the City's maintenance districts was expiring in 2012 so LHH decided to create District 5. Unfortunately, District 4 had been so underfunded that the roads had lost placement on the pavement condition index. It was agreed that District 5 would not suffer the same fate.

- To that end the Roads Committee recommended increasing the assessment to achieve a higher pavement condition index and to address drainage problems that were undermining the pavement.

  - The creation of District 5 was opposed from the outset by an anti-tax group. Though small in number, these residents challenged every aspect of the process.

How Council Members reacted and the need to

and the public

How policy making has been impacted by the Propositions

- Coincident with the 2007 recession, the City scaled back annual expenditures. Service cutbacks included a 20% reduction in patrol as well as a 30% staff cut.

- The shadow of Prop 218 hangs over the City at all times. For example, La Habra Heights is one of few cities in California that does not charge franchise fees though the refuse hauler has exclusivity. In general, city attorneys do not believe franchise fees fall under 218 nevertheless a plaintiff's attorney is filing cases against cities that impose or increase franchise fees without a Prop 218 election.

Conditions that led to the need for the renewal of the Benefit Assessment District in contrast to other funding needs.

- The fourth of the City's maintenance districts was expiring in 2012 so LHH decided to create District 5. Unfortunately, District 4 had been so underfunded that the roads had lost placement on the pavement condition index. It was agreed that District 5 would not suffer the same fate.

- To that end the Roads Committee recommended increasing the assessment to achieve a higher pavement condition index and to address drainage problems that were undermining the pavement.

- The creation of District 5 was opposed from the outset by an anti-tax group. Though small in number, these residents challenged every aspect of the process.

How Council Members reacted and the need to educate them and the public on the concept of a "general benefit" contribution - and related Prop 218 challenges

Though the Council knew it would not be an easy sell, they supported an increase in the assessment and voted unanimously to support the creation of District 5.

The anti-tax group funded direct-mail fliers that charged misuse of District 4 funds, improper allocation of special v. general benefits, and under-allocation of assessment units to the golf course, the nature preserve, and other non-residential properties.

The fliers cast doubts on the adequacy of the Pavement Management Plan and disputed the need to address faulty drainage.

The Roads Committee's information fliers tried to counter the misinformation however, the fliers were dull compared to the slick publications of the anti-tax group.

Warned not to give the appearance of using tax dollars to support District 5, the council did not actively campaign for the new district.

How Citizens Reacted

Much to the surprise of the Council and long-term residents, District 5 failed by a two-to-one vote.

Post-election analysis indicated several factors as the reasons for the vote:

A The anti-tax group convinced a large number of residents that the city had other sources of revenue and that should have been exhausted prior to imposing a parcel tax.

B Many residents could not see the need for road maintenance on their own street and therefore support the roads system as a whole.

Some residents insisted they saves and city streets.

who supported the district did so because:

e that ongoing maintenance would forestall

rstand the lack of revenue

e pleased with

Pre-Work

- Review of improvements and services
- Review of existing revenue sources and optio
- Review of existing budget and cost allocation
- Review of defined levels of services and cost s
- Research and studies available for general vs. s

Example: Update of the City's Pavement Mana Plan and Drainage Master Plan for pavement c index and maintenance efforts required for stre varying conditions.

Determine benefits

Improved access

Road damage can lead to or cause vehicular accidents. Road d access to a parcel. The usefulness of a parcel cannot be realize

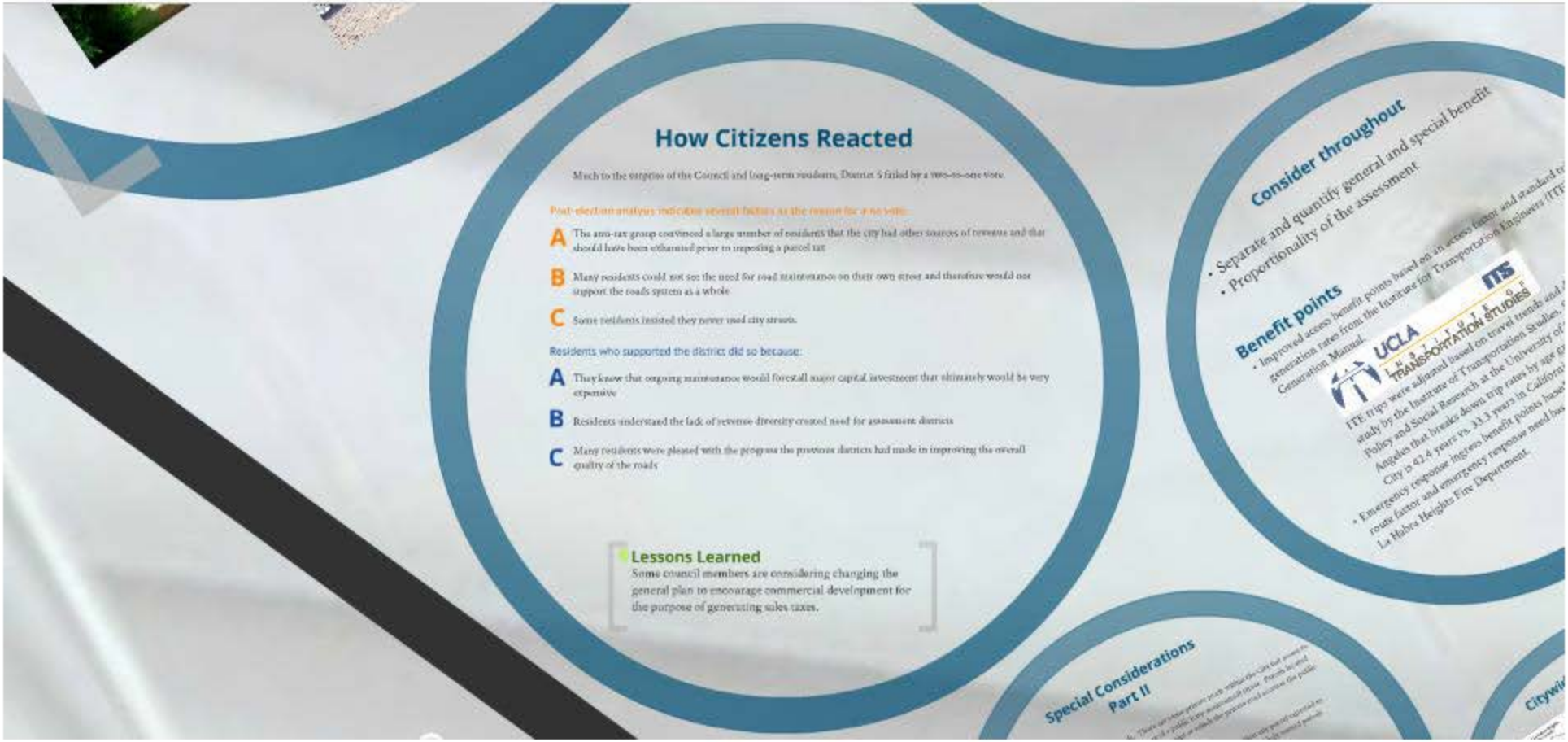
Though the Council knew it would not be an easy sell, they supported an increase in the assessment and voted unanimously to support the creation of District 5.

The anti-tax group funded direct-mail fliers that charged misuse of District 4 funds, improper allocation of special v. general benefits, and under-allocation of assessment units to the golf course, the nature preserve, and other non-residential properties.

The fliers cast doubts on the adequacy of the Pavement Management Plan and disputed the need to address faulty drainage.

The Roads Committee's information fliers tried to counter the misinformation thowever, the fliers were dull compared to the slick publications of the anti-tax group.

Warned not to give the appearance of using tax dollars to support District 5, the council did not actively campaign for the new district.


How Citizens Reacted
Much to the surprise of the Council and long-term residents, District 5 failed by a two-to-one vote.
Post-election analysis indicates several factors as the reason for a no vote:
A The anti-tax group convinced a large number of residents that the city had other sources of revenue and that should have been exhausted prior to imposing a parcel tax
B Many residents could not see the need for road maintenance on their own street and therefore would not support the roads system as a whole
C Some residents insisted they never used city streets.
Residents who supported the district did so because:
A They knew that ongoing maintenance would forestall major capital investment that ultimately would be very expensive
B Residents understand the lack of revenue diversity created need for assessment districts
C Many residents were pleased with the progress the previous districts had made in improving the overall quality of the roads
Lessons Learned
Some council members are considering changing the general plan to encourage commercial development for the purpose of generating sales taxes.
Consider throughout
• Separate and quantify general and special benefit
• Proportionality of the assessment
Benefit points
• Improved access benefit points based on access factor and standard
generation rates from the Institute for Transportation Engineers (ITE
Generation Manual.
UCLA
TRANSPORTATION STUDIES
ITE trips were adjusted based on travel trends and
study by the Institute of Transportation Studies,
Policy and Social Research at the University of
Angeles that breaks down trip rates by age g
City is 42.4 years vs. 33.3 years in Californ
• Emergency response ingress benefit points base
route factor and emergency response need ba
La Habra Heights Fire Department.
Special Considerations
Part II

How Citizens Reacted

Much to the surprise of the Council and long-term residents, District 5 failed by a two-to-one vote.

Post-election analysis indicated several factors as the reason for a no vote:

A The anti-tax group convinced a large number of residents that the city had other sources of revenue and that should have been exhausted prior to imposing a parcel tax

B Many residents could not see the need for road maintenance on their own street and therefore would not support the roads system as a whole

C Some residents insisted they never used city streets.

Residents who supported the district did so because:

A They knew that ongoing maintenance would forestall major capital investment that ultimately would be very expensive

B Residents understand the lack of revenue diversity created need for assessment districts

C Many residents were pleased with the progress the previous districts had made in improving the overall quality of the roads

Lessons Learned

Some council members are considering changing the general plan to encourage commercial development for the purpose of generating sales taxes.

The Science of Quantifying Special vs General Benefit

Pablo Perez

NBS

"general benefit"

ed Prop 218 challenges

t would not be an easy sell, they supported an
nd voted unanimously to support the creation

direct-mail fliers that charged misuse of
allocation of special v. general benefits, and
ment units to the golf course, the nature
residential properties.

the adequacy of the Pavement Management Plan
address faulty drainage.

s information fliers tried to counter the
ver, the fliers were dull compared to the slick
-tax group.

e appearance of using tax dollars to support District
actively campaign for the new district.

ughout

al and special benefit

Pre-Work

- Review of improvements and services
- Review of existing revenue sources and options
- Review of existing budget and cost allocation plan
- Review of defined levels of services and cost savings
- Research and studies available for general vs. special benefit analysis

Example: Update of the City's Pavement Management Plan and Drainage Master Plan for pavement condition index and maintenance efforts required for streets in varying conditions.

Determine benefits

Improved access:

Road damage can lead to or cause vehicular accidents. Road damage can impair access to a parcel. The usefulness of a parcel cannot be realized unless it is accessible.

Improved ingress for emergency response vehicles:

The efficient and timely response to emergencies is a critical component to the effectiveness of emergency response. Improving road conditions will improve emergency response efficiency and timeliness. The benefit of improved ingress for emergency response is similar to improved access to a parcel but will be measured differently and evaluated separately.

Pre-Work

- Review of improvements and services
- Review of existing revenue sources and options
- Review of existing budget and cost allocation plan
- Review of defined levels of services and cost savings
- Research and studies available for general vs. special benefit analysis

Example: Update of the City's Pavement Management Plan and Drainage Master Plan for pavement condition index and maintenance efforts required for streets in varying conditions.

Determine benefits

Improved access:

Road damage can lead to or cause vehicular accidents. Road damage can impair access to a parcel. The usefulness of a parcel cannot be realized unless it is accessible.

Improved ingress for emergency response vehicles:

The efficient and timely response to emergencies is a critical component to the effectiveness of emergency response. Improving road conditions will improve emergency response efficiency and timeliness. The benefit of improved ingress for emergency response is similar to improved access to a parcel but will be measured differently and evaluated separately.


Consider throughout
• Separate and quantify general and special benefit
• Proportionality of the assessment
Benefit points
• Improved access benefit points based on an access factor and standard trip generation rates from the Institute for Transportation Engineers (ITE) Trip Generation Manual.
UCLA ITS
INSTITUTE OF TRANSPORTATION STUDIES
ITE trips were adjusted based on travel trends and demographics study by the Institute of Transportation Studies, School of Public Policy and Social Research at the University of California, Los Angeles that breaks down trip rates by age group. Median age in the City is 42.4 years vs. 33.3 years in California.
• Emergency response ingress benefit points based on an emergency response route factor and emergency response need based on incident data from the La Habra Heights Fire Department.
Special Considerations Part II
Special considerations

Consider throughout

- Separate and quantify general and special benefit
- Proportionality of the assessment

Benefit points

- Improved access benefit points based on an access factor and standard trip generation rates from the Institute for Transportation Engineers (ITE) Trip Generation Manual.

  ITE trips were adjusted based on travel trends and demographics study by the Institute of Transportation Studies, School of Public Policy and Social Research at the University of California, Los Angeles that breaks down trip rates by age group. Median age in the City is 42.4 years vs. 33.3 years in California.

- Emergency response ingress benefit points based on an emergency response route factor and emergency response need based on incident data from the La Habra Heights Fire Department.

and special benefit

ıent

ın access factor and standard trip
ransportation Engineers (ITE) Trip

ITS
T E OF
N STUDIES

n travel trends and demographics
ortation Studies, School of Public
ıe University of California, Los
rates by age group. Median age in the
in California.
oints based on an emergency response
need based on incident data from the

Special considerations Part I

An access factor was used to account for the fact that certain parcels, based on their location, will receive different degrees of access benefit. The access factor is determined by a parcel's immediate driveway access point. Each parcel in the City falls into one of three categories:

Exclusive access – Parcels that require the use of maintained streets for access
Most parcels fall within this category and receive the full benefit points. Access factor: 1.0.

Non-exclusive access – Parcels where a driveway meets an intersection, half of which is maintained by the City, and other half is not. The intersection is the point at which the City's maintenance stops because the intersection is located on the border line of the City limits and the road continues into another jurisdiction. Access factor: 0.5.

No access – Parcels in the City that are accessed from streets completely outside the City's maintenance network. Access factor: 0.0.

Special considerations Part I

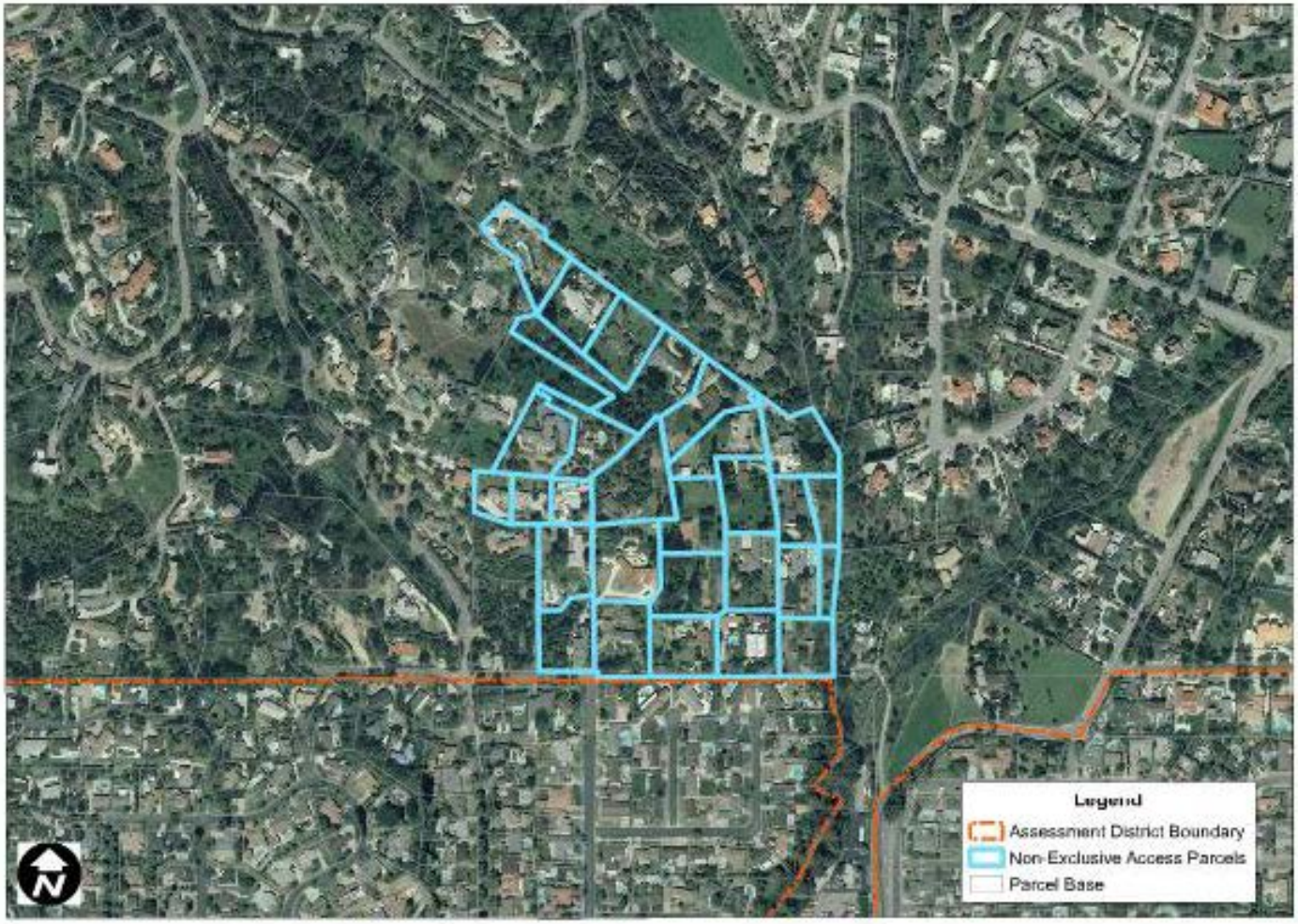
An access factor was used to account for the fact that certain parcels, based on their location, will receive different degrees of access benefit. The access factor is determined by a parcel's immediate driveway access point. Each parcel in the City falls into one of three categories:

Exclusive access - Parcels that require the use of maintained streets for access

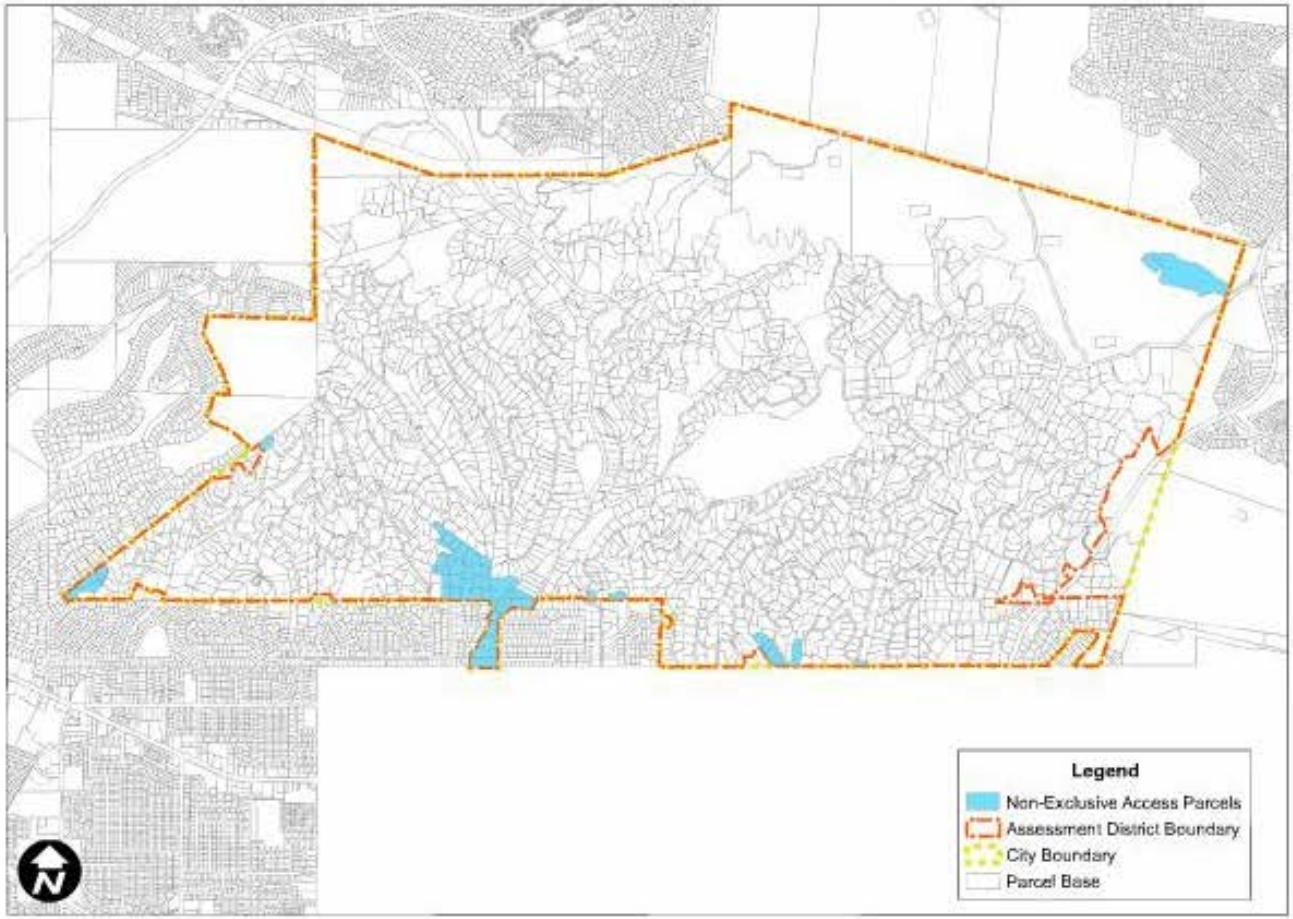
Most parcels fall within this category and receive the full benefit points. Access factor: 1.0.

Non-exclusive access – Parcels where a driveway meets an intersection, half of which is maintained by the City, and other half is not. The intersection is the point at which the City's maintenance stops because the intersection is located on the border line of the City limits and the road continues into another jurisdiction. Access factor: 0.5.

No access – Parcels in the City that are accessed from streets completely outside the City's maintenance network. Access factor: 0.0.

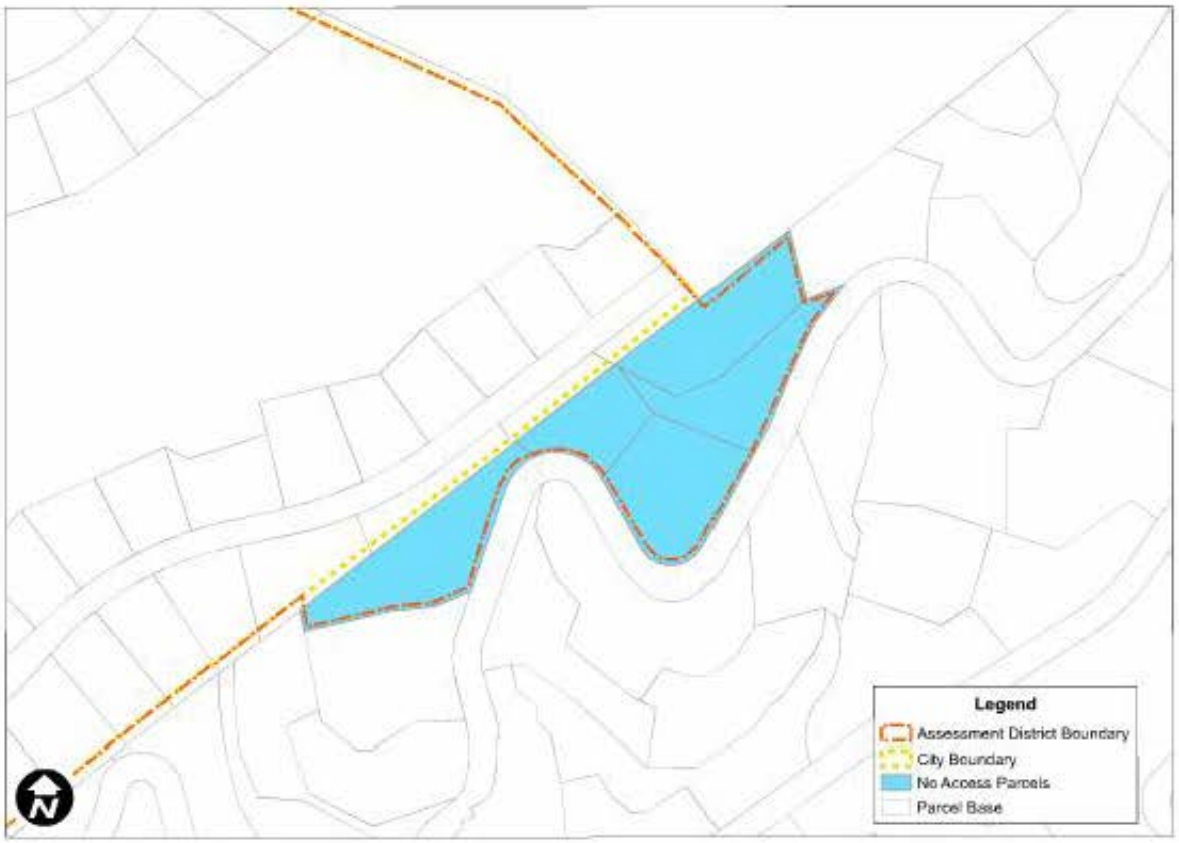


City of La Habra Heights



City of La Habra Heights

City of La Habra Heights



City of La Habra Heights

- An emergency response route factor was used to account for the fact that certain parcels, based on their location, will receive less emergency response ingress benefit than others. The emergency response route factor is determined by the route traveled by the Fire Department to a parcel in response to an emergency. Each parcel in the City falls into one of two categories:

- Maintained street emergency route – Route used by the Fire Department requires the use of streets within the City's maintenance network.
  - Most parcels fall within this category and receive the full benefit points. Emergency response factor: 1.0.

- Non-maintained street emergency route – Route used by the Fire Department does not require the use of streets within the City's maintenance network. Includes parcels that can only be accessed by the Fire Department from streets in the City of Whittier or the County. Emergency response factor: 0.0.

Angeles that breaks down trip
City is 42.4 years vs. 33.3 years in California
- Emergency response ingress benefit points based on
route factor and emergency response need based on
La Habra Heights Fire Department.

Special Considerations Part II

Private roads:

- The City does not maintain private roads. There are some private roads within the City but access to the private road requires, at some point, the use of a public (city-maintained) street. Parcels located on private roads are assessed as if they fronted the point at which the private road accesses the public street. (No adjustment).

Publicly owned parcels:

- If benefits accruing to parcels will be measured largely by vehicle trips then any parcel expected to generate vehicle trips will be deemed to receive some benefit – including publicly owned parcels (County, City, Water District, Community College). (No adjustment).

Ancillary residential property:

- Parcel ancillary to an adjacent single family residential parcel. These parcels may be completely undeveloped or may contain improvements such as pools, garages, or storage sheds, but they are not improved with dwelling units. Parcel must share a boundary line with the single family residential parcel, have common ownership, and be less than one acre in size (average size of residential parcels in the City). (Zero access).

Separation of general and special benefits

For this particular Assessment District, general benefits accrue mainly related to vehicles "passing through" the City. Vehicles coming from or going to a parcel within the City imply special benefit. The separation of general and special benefits will be measured by the estimated portion of vehicle trips "passing through" the City.

Citywide Maps

Specific streets and general vs. special benefits

Special Considerations
Part II

Private roads:

- The City does not maintain private roads. There are some private roads within the City but access to the private road requires, at some point, the use of a public (city-maintained) street. Parcels located on private roads are assessed as if they fronted the point at which the private road accesses the public street. (No adjustment).

Publicly owned parcels:

- If benefits accruing to parcels will be measured largely by vehicle trips then any parcel expected to generate vehicle trips will be deemed to receive some benefit – including publicly owned parcels (County, City, Water District, Community College). (No adjustment).

Ancillary residential property:

- Parcel ancillary to an adjacent single family residential parcel. These parcels may be completely undeveloped or may contain improvements such as pools, garages, or storage sheds, but they are not improved with dwelling units. Parcel must share a boundary line with the single family residential parcel, have common ownership, and be less than one acre in size (average size of residential parcels in the City). (Zero access).

Separation of general and special benefits

For this particular Assessment District, general benefits accrue mainly related to vehicles "passing through" the City. Vehicles coming from or going to a parcel within the City imply special benefit. The separation of general and special benefits will be measured by the estimated portion of vehicle trips "passing through" the City.

average size of residential parcels

f general and special benefits

ar Assessment District, general benefits
elated to vehicles "passing through" the
oming from or going to a parcel within
ecial benefit. The separation of general
fits will be measured by the estimated
cle trips "passing through" the City.

Citywide Maps

Specific streets and general vs. special benefits

- Harbor Boulevard – There is much traffic on Hacienda Road, but maintained by the County. Not included in the City's street maintenance network, nor is it used in the determination of special and general benefit.
- Hacienda Road – Average traffic is approximately ten times that of any other street maintained by the City. Available traffic impact study data for Hacienda Road and East and West Road connectors was used in conjunction with dividing the City into "traffic basins" to estimate trip generation from City parcels to and from Hacienda Road. Special benefit result: 28%. General benefit result: 72%.
- East Road and West Road Connectors (one each side of the City to the center (Hacienda Road)) – Available traffic study data and layout of East and West Roads confirmed that roads are not used for major "pass through" traffic (but some). Special benefit result: 64.9%. General benefit result: 35.1%.
- Local streets – Method 1 – Based on the layout of the City's local streets, there are no local streets that provide an efficient or direct way to travel other than to access a parcel within the City. However, a minimal amount of "pass through" traffic from lost drivers (given the winding and secluded nature of the local streets) and a minimal amount of "residential tourism" (given the beautiful homes and natural surroundings) was estimated at 1% each. Special benefit result: 98%. General benefit result: 2%.
- Local streets – Method 2 – Very limited traffic study data was available for local streets, except for a study completed in 1993 (for some local streets only). Analysis of the limited traffic count data collected approximately 98% local traffic confirming special benefit assignment of 98% to local streets. General benefit result: 2%.

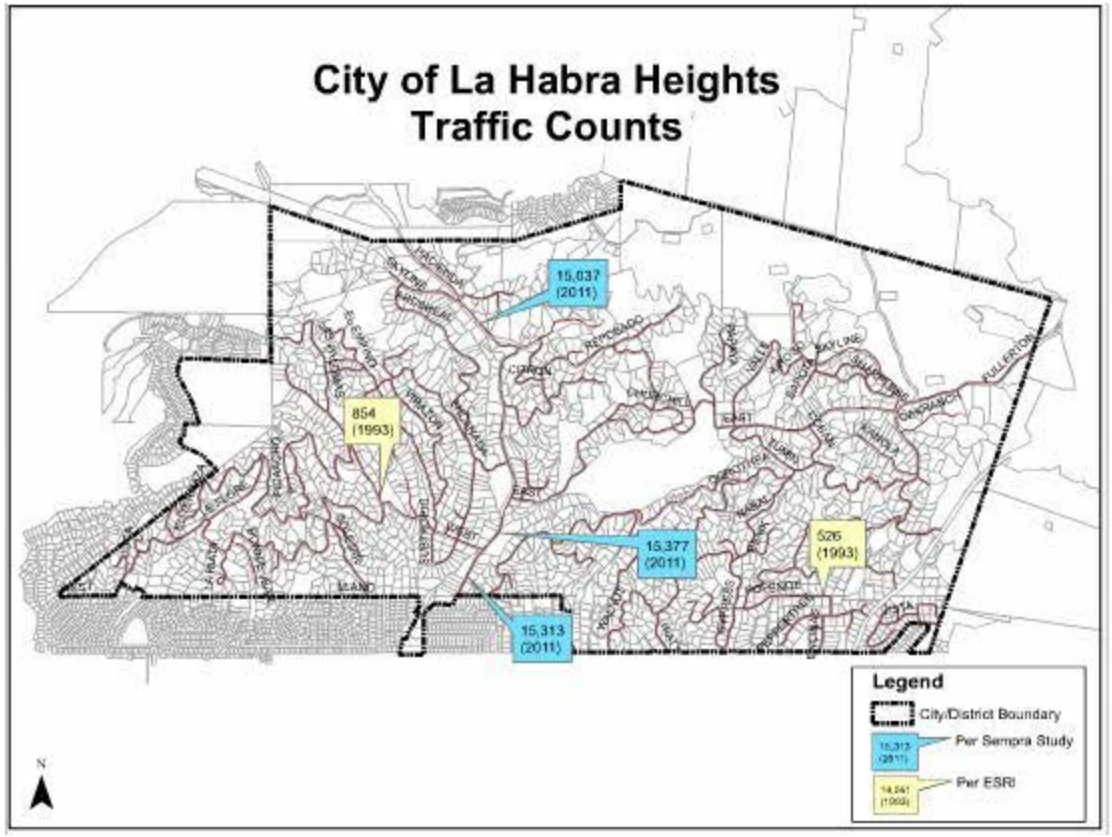
Special considerati

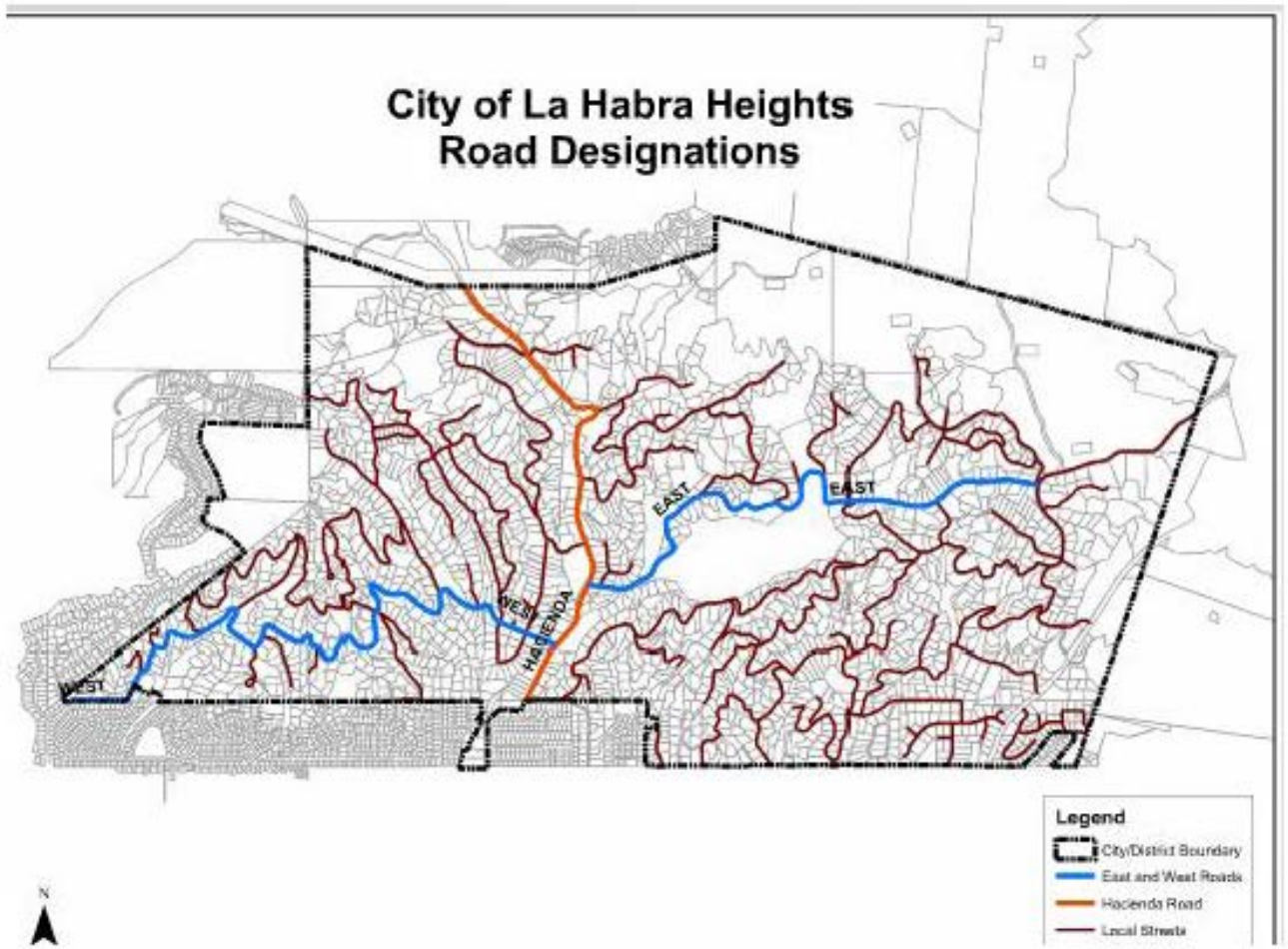
Parcels outside City boundary bu
maintained by the City

Total squa
street was
assigned as
Special bene
specific stre
benefit resu
street area.

System-wide general benefit calc

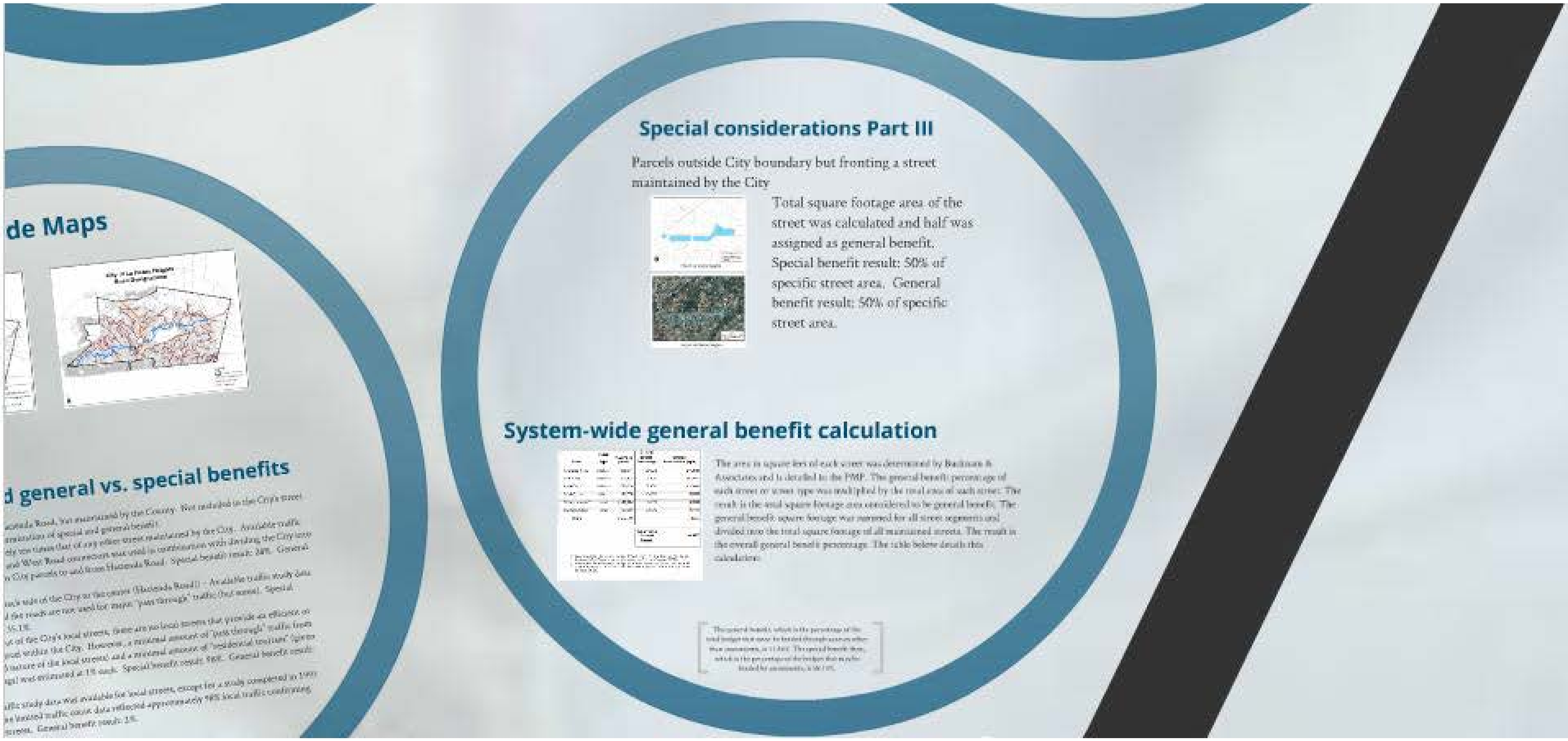
The area (in square feet of each street
Associates and is detailed in the PMP
each street or street type was multipli
result is the total square footage area
general benefit square footage was su
divided into the total square footage o
the overall general benefit percentage
calculation.


City of La Habra Heights
Traffic Counts
15,037
(2011)
854
(1993)
15,377
(2011)
526
(1993)
15,313
(2011)
Legend
City/District Boundary
Per Sempra Study
Per ESRI
N


City of La Habra Heights
Road Designations
EAST
EAST
EAST
WEST
HACIENDA
Legend
City/District Boundary
East and West Roads
Hacienda Road
Local Streets
N

Specific streets and general vs. special benefits

- Harbor Boulevard – Twice as much traffic as Hacienda Road, but maintained by the County. Not included in the City's street maintenance network, nor is it used in the determination of special and general benefit.
- Hacienda Road – Average traffic is approximately ten times that of any other street maintained by the City. Available traffic impact study data for Hacienda Road and East and West Road connectors was used in combination with dividing the City into "traffic basins" to estimate trip generation from City parcels to and from Hacienda Road. Special benefit result: 28%. General benefit result: 72%.
- East Road and West Road (connectors from each side of the City to the center (Hacienda Road)) – Available traffic study data and layout of East and West Roads confirmed the roads are not used for major "pass through" traffic (but some). Special benefit result: 64.9%. General benefit result: 35.1%.
- Local streets – Method 1 - Based on the layout of the City's local streets, there are no local streets that provide an efficient or direct way to travel other than to access a parcel within the City. However, a minimal amount of "pass through" traffic from lost drivers (given the winding and secluded nature of the local streets) and a minimal amount of "residential tourism" (given the beautiful homes and natural surroundings) was estimated at 1% each. Special benefit result: 98%. General benefit result: 2%.
- Local streets – Method 2 – Very limited traffic study data was available for local streets, except for a study completed in 1993 (for some local streets only). Analysis of the limited traffic count data reflected approximately 98% local traffic confirming special benefit assignment of 98% to local streets. General benefit result: 2%.


de Maps
d general vs. special benefits
Special considerations Part III
Parcels outside City boundary but fronting a street maintained by the City
Total square footage area of the street was calculated and half was assigned as general benefit. Special benefit result: 50% of specific street area. General benefit result: 50% of specific street area.
System-wide general benefit calculation
The area in square feet of each street was determined by Bucknam & Associates and is detailed in the PMP. The general benefit percentage of each street or street type was multiplied by the total area of each street. The result is the total square footage area considered to be general benefit. The general benefit square footage was summed for all street segments and divided into the total square footage of all maintained streets. The result is the overall general benefit percentage. The table below details this calculation.

Special considerations Part III

Parcels outside City boundary but fronting a street maintained by the City

Total square footage area of the street was calculated and half was assigned as general benefit. Special benefit result: 50% of specific street area. General benefit result: 50% of specific street area.

City of La Habra Heights

City of La Habra Heights

System-wide general benefit calculation

Road	Street Type	Total Area (sq ft)	General Benefit Percentage	General Benefit Area (sq ft)
Hacienda Road	collector	338,571	72.00%	243,810
Pear Road	collector	390,425	35.10%	105,087
West Road[1]	collector	370,038	35.10%	129,880
West/Arbela	collector	25,770	50.00%	12,885
All local streets[2]	local	3,912,384	2.00%	78,248
Avocado/Citrus	local	25,220	52.00%	13,110
Totals		**4,902,512**		**581,656**

Systemwide General Benefit	**11.86%**

[1] Represents the total square footage of West Road, 390,004 , less the total square footage of West/Arbela where parcels outside the City have frontage, 25,770.
[2] Represents the total square footage of all local streets, 3,938,616 , less the total square footage of Avocado Road/Citrus where parcels outside the City have frontage, 26,232.

The area in square feet of each street was determined by Bucknam & Associates and is detailed in the PMP. The general benefit percentage of each street or street type was multiplied by the total area of such street. The result is the total square footage area considered to be general benefit. The general benefit square footage was summed for all street segments and divided into the total square footage of all maintained streets. The result is the overall general benefit percentage. The table below details this calculation:

The general benefit, which is the percentage of the total budget that must be funded through sources other than assessments, is 11.86%. The special benefit then, which is the percentage of the budget that may be funded by assessments, is 88.14%.

Summary of Assessments

Total Budget (FY 2012/13)	**$1,116,793.65**
General Benefit (11.86%) [1]	132,451.73
Special Benefit (88.14%) [2]	984,341.92
Total Benefit Points	1,867.43
Maximum Assessment per Benefit Point (FY 2012/13)	**$527.11**

(1) Portion of the budget that cannot be funded by assessments
(2) Portion of the budget that can be funded by assessments

Budget

Description	Estimated 2012/13 Budget
Street Maintenance Personnel Costs	
A. Wages - Full time position	$65,000.00
B. Benefits	16,250.00
Street Maintenance Personnel Costs Subtotal	**$81,250.00**
Drainage Maintenance/Construction Costs	
A. Maintenance of Drainage Channels	$40,000.00
B. Construction Budget - Facility Repair	90,000.00
B.1. Contingency (10%)	9,000.00
B.2. Project Design (7%)	6,300.00
B.3. Construction Management and Inspection (7%)	6,300.00
Drainage Maintenance/Construction Costs Subtotal	**$151,600.00**
Street Maintenance/Construction Costs	
A. Construction Budget - Roads and Berms	$626,825.00
A.1. Contingency (10%)	62,682.50
A.2. Project Design (7%)	43,877.75
A.3. Construction Management and Inspection (7%)	43,877.75
Street Maintenance/Construction Costs Subtotal	**$777,263.00**
District Administration	
A. Assessment District Administration	$10,000.00
B. Printing and advertising	5,500.00
C. Update of GIS maps (project tracking and history)	3,000.00
D. Public Works Director/City Engineer	35,000.00
District Administration Subtotal	**$53,500.00**
Budget Subtotal	**$1,063,613.00**
Overhead (5%)	53,180.65
Total Budget	**$1,116,793.65**

Method of Assessment

The maximum assessment for each parcel in the District is calculated by the following procedure:

Step 1: Assign each parcel its appropriate land use type based on the most recent Los Angeles County Assessor's Secured Roll data.

Step 2: Assign each parcel an AF based on its location and the rates in the table below:

Parcel Access Type	Access Factor
Exclusive Access	1.00
Non-Exclusive Access	0.50
No Access	0.00

Step 3: Assign each parcel ADT based on land use type and the rates in the table below:

Land Use Type		ADT Formula
Ancillary Residential Property	0.00	per parcel
City Hall	114.00	per parcel
City Park	1.59	per acre
Golf Course	98.00	per golf course
Miscellaneous Stadium	1.75	per parcel
Nursing Home	2.30	per bed
Office	11.57	per 1,000 sq ft of building area
Open Space / Hiking Trails	0.06	per acre
Religious Institution	0.43	per parking space
Resource Extraction	1.75	per parcel
School	14.49	per 1,000 sq ft of building area
Single Family Residential	7.00	per parcel
Undeveloped Land	0.06	per acre

Method of Assessment continued...

After computing each parcel's ADT, divide the result by seven to determine the equivalent daily trips (EDT). The vast majority of single family residential parcels are assigned seven ADT. For ease, each parcel's ADT are divided by seven so that the majority of single family residential parcels (which make up 82% of the City's parcels) will represent the base EDT of 1.0 and all other parcels will be relative to such EDT.

The table to the right shows the EDT formulas:

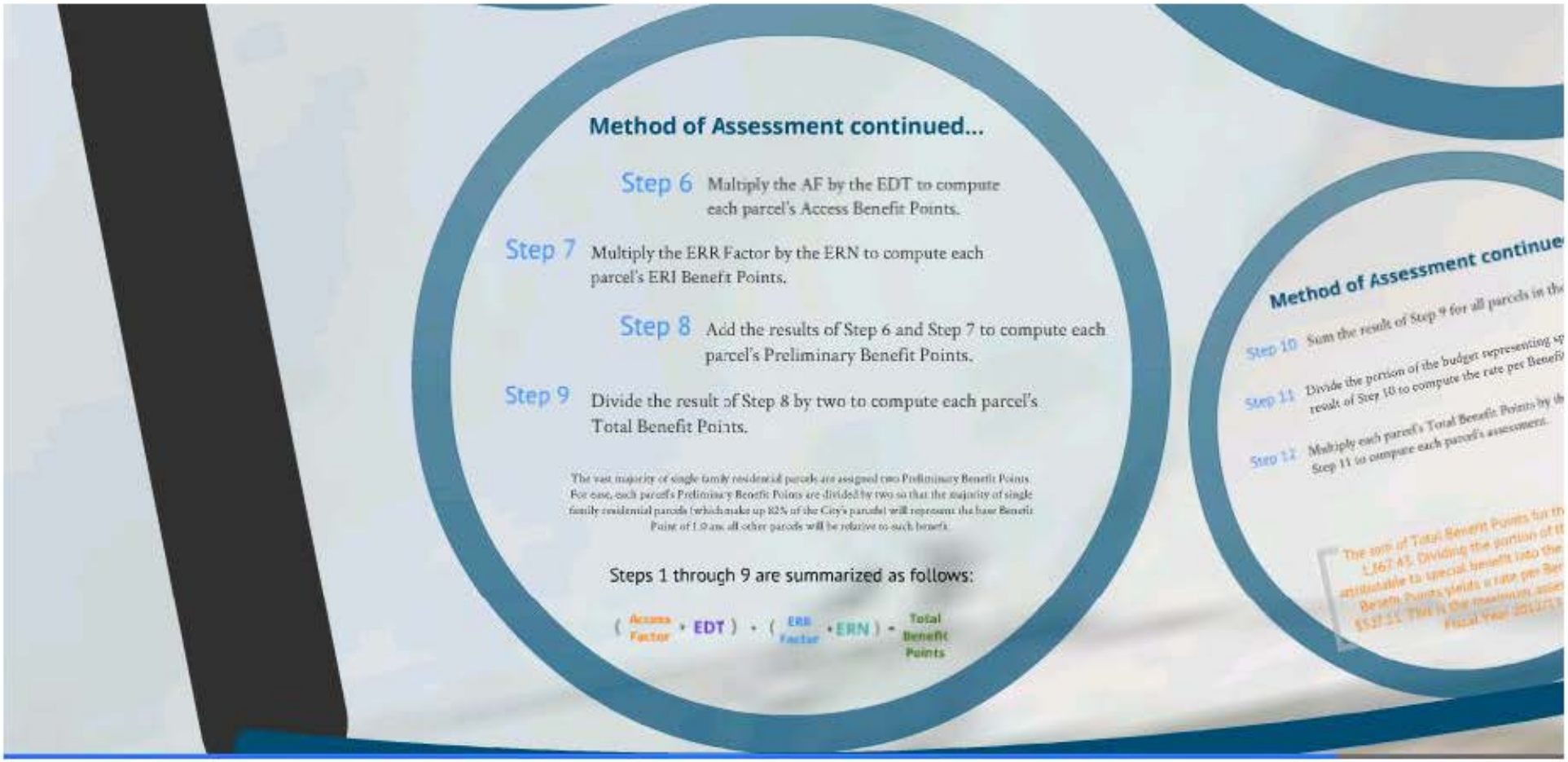
Land Use Type	EDT Formula	
Ancillary Residentia Property	0.00	per parcel
City Hall	16.29	per parcel
City Park	0.2271	per acre
Golf Course	13.71	per golf course
Miscellaneous Strudure	0.2500	per parcel
Nursing Home	0.3286	per bed
Office	1.65	per 1,000 sq ft of building area
Open Space / Hiking Trails	0.0086	per acre
Religious Institution	0.0614	per parking space
Resource Extraction	0.2500	per parcel
School	2.07	per 1,000 sq ft of building area
Single Family Residential	1.00	per parcel
Undeveloped Land	0.0114	per acre

Step 4 Assign each parcel an ERR Factor based on its location and the rates in the table to the below:

Emergency Route Type	ERR Factor
Maintained Emergency Route	1.00
No Maintained Emergency Route	0.00

Step 5 Assign each parcel ERN based on its land use type and the rates in the table below:

Land Use Type	ERN (per parcel unless otherwise noted)
Ancillary Residential Property	0.00
Church	3.38
City Hall	0.00
Golf Course	4.51 per course
Miscellaneous Stucture	0.00
Nursing Home	4.51
Office	0.75
Park	15.03
Private Road	0.00
Resource Extracton	0.12
School	0.75
Single Family Residential	1.00
Undeveloped/Open Space	0.02 per acre


Method of Assessment continued...
Step 6 Multiply the AF by the EDT to compute each parcel's Access Benefit Points.
Step 7 Multiply the ERR Factor by the ERN to compute each parcel's ERI Benefit Points.
Step 8 Add the results of Step 6 and Step 7 to compute each parcel's Preliminary Benefit Points.
Step 9 Divide the result of Step 8 by two to compute each parcel's Total Benefit Points.
The vast majority of single family residential parcels are assigned two Preliminary Benefit Points. For ease, each parcel's Preliminary Benefit Points are divided by two so that the majority of single family residential parcels (which make up 82% of the City's parcels) will represent the base Benefit Point of 1.0 and all other parcels will be relative to such benefit.
Steps 1 through 9 are summarized as follows:
(Access Factor • EDT) + (ERR Factor • ERN) = Total Benefit Points
Method of Assessment continue
Step 10 Sum the result of Step 9 for all parcels in the
Step 11 Divide the portion of the budget representing sp
result of Step 10 to compute the rate per Benefit
Step 12 Multiply each parcel's Total Benefit Points by th
Step 11 to compute each parcel's assessment.

Method of Assessment continued...

Step 6 Multiply the AF by the EDT to compute each parcel's Access Benefit Points.

Step 7 Multiply the ERR Factor by the ERN to compute each parcel's ERI Benefit Points.

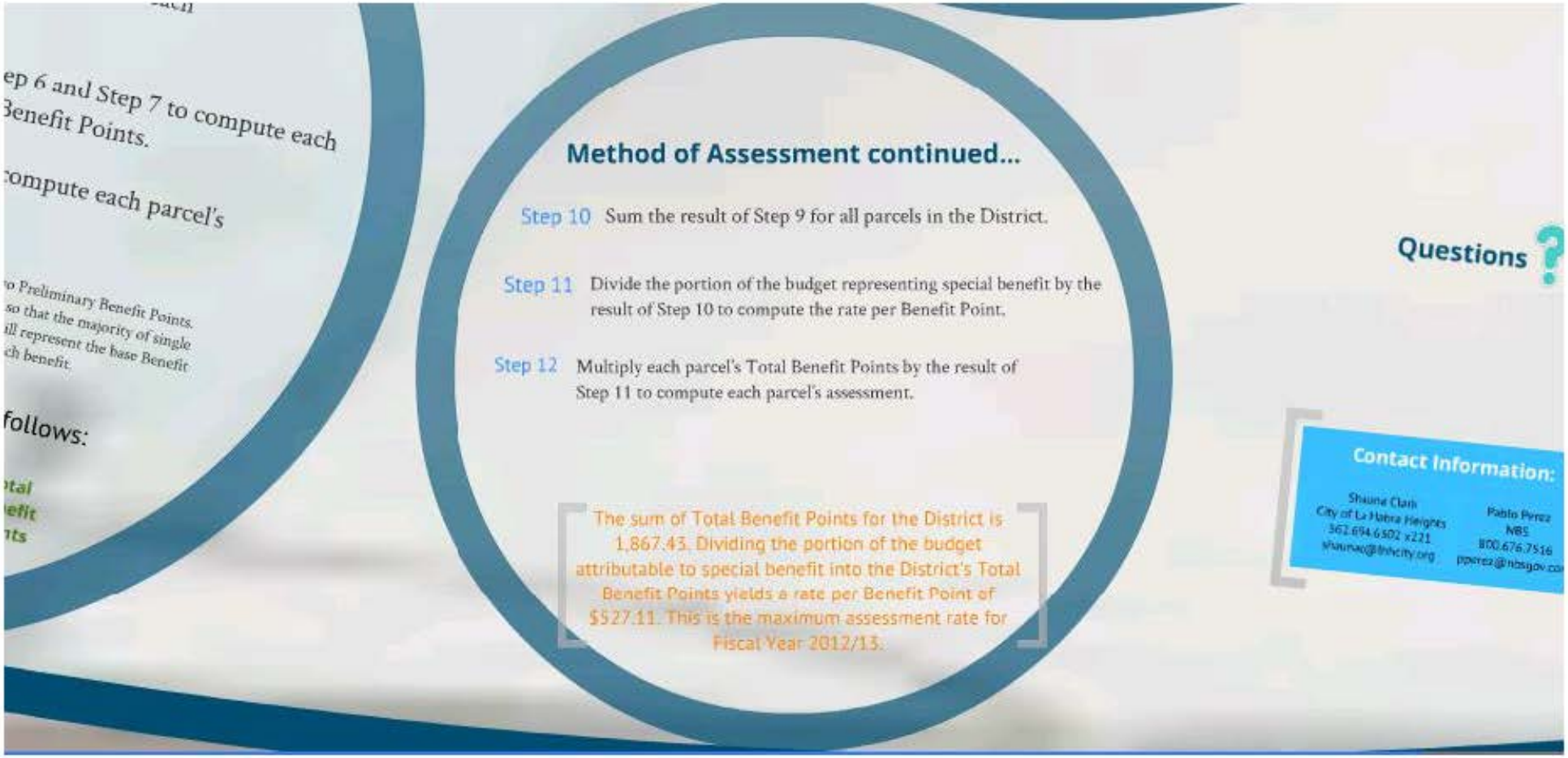
Step 8 Add the results of Step 6 and Step 7 to compute each parcel's Preliminary Benefit Points.

Step 9 Divide the result of Step 8 by two to compute each parcel's Total Benefit Points.

The vast majority of single family residential parcels are assigned two Preliminary Benefit Points. For ease, each parcel's Preliminary Benefit Points are divided by two so that the majority of single family residential parcels (which make up 82% of the City's parcels) will represent the base Benefit Point of 1.0 and all other parcels will be relative to such benefit.

Steps 1 through 9 are summarized as follows:

(Access Factor x EDT) + (ERR Factor x ERN) = Total Benefit Points


ep 6 and Step 7 to compute each
Benefit Points.
compute each parcel's
o Preliminary Benefit Points.
so that the majority of single
ill represent the base Benefit
ch benefit.
follows:
tal
efit
nts
Method of Assessment continued...
Step 10 Sum the result of Step 9 for all parcels in the District.
Step 11 Divide the portion of the budget representing special benefit by the result of Step 10 to compute the rate per Benefit Point.
Step 12 Multiply each parcel's Total Benefit Points by the result of Step 11 to compute each parcel's assessment.
The sum of Total Benefit Points for the District is 1,867.43. Dividing the portion of the budget attributable to special benefit into the District's Total Benefit Points yields a rate per Benefit Point of $527.11. This is the maximum assessment rate for Fiscal Year 2012/13.
Questions ?
Contact Information:
Shauna Clark
City of La Habra Heights
562.694.6502 x221
Pablo Perez
NBS
800.676.7516

Method of Assessment continued...

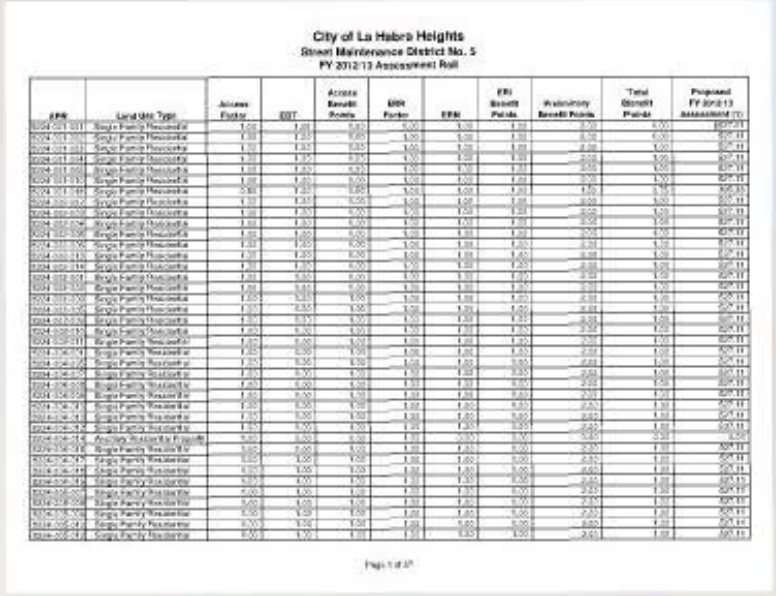
Step 10 Sum the result of Step 9 for all parcels in the District.

Step 11 Divide the portion of the budget representing special benefit by the result of Step 10 to compute the rate per Benefit Point.

Step 12 Multiply each parcel's Total Benefit Points by the result of Step 11 to compute each parcel's assessment.

The sum of Total Benefit Points for the District is 1,867.43. Dividing the portion of the budget attributable to special benefit into the District's Total Benefit Points yields a rate per Benefit Point of $527.11. This is the maximum assessment rate for Fiscal Year 2012/13.

Assessment Roll (Sample)



City of La Habra Heights
Street Maintenance District No. 5
FY 2012/13 Assessment Roll

APN	Land Use Type	Access Factor	EDT	Access Benefit Points	ERR Factor	ERN	ERI Benefit Points	Preliminary Benefit Points	Total Benefit Points	Proposed FY 2012/13 Assessment ($)
8264-021-001	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-002	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-003	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-004	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-005	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-013	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-014	Single Family Residential	0.80	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-015	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-016	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-017	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-018	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-019	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-020	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-021	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-022	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-023	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-024	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-025	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-026	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-027	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-028	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-029	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-030	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-031	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-032	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-033	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-034	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-035	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-036	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-037	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-038	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-039	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-040	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-041	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-042	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-043	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-044	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-045	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-046	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-047	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-048	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-049	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-050	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-051	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-052	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-053	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-054	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-055	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-056	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-057	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-058	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-059	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-060	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-061	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-062	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-063	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-064	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-065	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-066	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-067	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-068	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-069	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-070	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-071	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-072	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-073	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11
8264-021-074	Single Family Residential	1.00	1.00	0.85	1.00	1.00	1.00	0.00	1.00	$577.11

Page 1 of 7

City of La Habra Heights
Street Maintenance District No. 5
FY 2012/13 Assessment Roll

APN	Land Use Type	Access Factor	EDT	Access Benefit Points	ERR Factor	ERN	ERI Benefit Points	Preliminary Benefit Points	Total Benefit Points	Proposed FY 2012/13 Assessment (1)
8224-001-001	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	$527.11
8224-001-002	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-001-003	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-001-004	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-001-005	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-001-010	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-001-018	Single Family Residential	0.50	1.00	0.50	1.00	1.00	1.00	1.50	0.75	395.33
8224-002-002	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-002-003	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-002-004	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-002-005	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-002-006	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-002-013	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-002-014	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-001	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-002	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-003	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-005	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-009	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-010	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-003-011	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-001	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-005	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-007	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-008	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-009	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-010	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-012	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-013	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-014	Ancillary Residential Property	1.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00
8224-004-015	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-017	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-018	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-004-019	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-005-007	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-005-008	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-005-009	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-005-010	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8224-005-012	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11

City of La Habra Heights
Street Maintenance District No. 5
FY 2012/13 Assessment Roll

APN	Land Use Type	Access Factor	EDT	Access Benefit Points	ERR Factor	ERN	ERI Benefit Points	Preliminary Benefit Points	Total Benefit Points	Proposed FY 2012/13 Assessment (1)
8267-035-055	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-056	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-057	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-058	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-059	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-060	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-063	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-067	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-068	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-069	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-070	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-071	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-072	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8267-035-073	Single Family Residential	1.00	1.00	1.00	1.00	1.00	1.00	2.00	1.00	527.11
8291-004-800	Resource Extraction	1.00	0.25	0.25	1.00	0.10	0.10	0.35	0.18	92.24
8291-023-800	Resource Extraction	1.00	0.25	0.25	1.00	0.10	0.10	0.35	0.18	92.24
Totals		**2,172.50**	**1,936.91**	**1,887.07**	**2,160.00**	**1,879.20**	**1,847.80**	**3,734.73**	**1,867.43**	**$984,341.12**

(1) Actual amount placed on the tax roll may less due to Los Angeles County Auditor requirements that the levy be an even number

Questions

Contact Information:

Shauna Clark
City of La Habra Heights
562.694.6302 x221
shaunac@lhhcity.org

Pablo Perez
NBS
800.676.7516
pperez@nbsgov.com