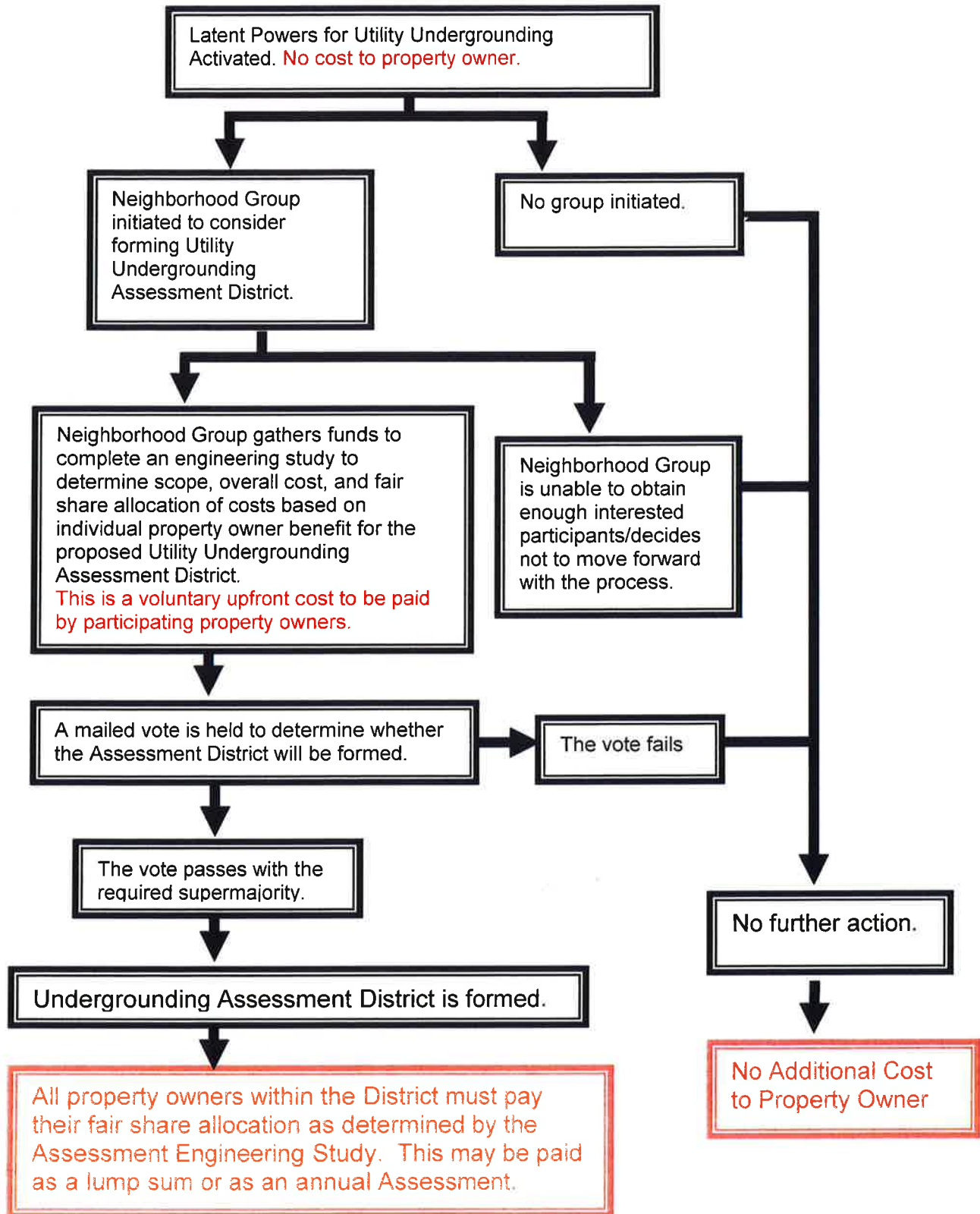


# Utility Undergrounding Assessment Districts

## Process and Property Owner Costs Following the Activation of Latent Powers



**ITEM: Assessment District Petition & Cover Letter**

**Date: 4/7/2011**

**Item #**

Submitted by: Assessment District Committee

## **INTRODUCTION**

The Assessment District Committee was established by the Board of Directors in Fall 2010. Since that meeting, the committee has been working to complete two important documents to begin the process of undergrounding utilities by district. First, a formal petition to be signed by each property owner and submitted to the Rancho Santa Fe Community Services District (CSD) (Attachment 1), and second a cover letter to go along with the petition, explaining the undergrounding process and outlining the requirements and responsibilities of the property owner (Attachment 2).

## **BACKGROUND**

Prior to the formation of the Assessment District Committee, the Association held a community-wide meeting in May 2010 to provide information to all members interested in undergrounding their utilities. Over 75 members attended the meeting, from which staff gathered a small list of residents who expressed a strong interest in leading their district in the undergrounding process, serving as 'District Captains'. These Captains would serve as a liaison between the residents in their district and the CSD through the duration of the application process.

Now that the committee has approved the formal petition and cover letter, the next step is bringing these documents to your Board for review. If approved, staff will contact the interested individuals (potential District Captains) and meet with them to discuss the process in detail and provide them with the necessary materials to initiate the application process. The District Captain will talk to their neighbors and the signed petition forms to submit to the CSD. From there, the application will come back to the Assessment District Committee for review and a recommendation to the CSD regarding whether or not to approve the potential district. If approved, the application process from that point on will be between the CSD and the residents of the proposed district.

If those few individuals that had previously indicated interest in becoming District Captains are successful in the initial phases of the application process, staff will move forward with assisting those residents and monitoring the process with the CSD. Based on current Association workload and staffing, these initial District Captains will need to complete the entire undergrounding process before new District Captains can be selected for additional districts. We will undoubtedly learn from this first group of

applications how the process will unfold, better preparing the Committee and staff for future applications.

## **RECOMMENDATION**

The Assessment District Committee reviewed these documents at their meeting on March 15, 2011, and recommends approval.

Staff concurs.

### *Suggested Motion*

*I move to approve the Assessment District Committees' Petition for Special Assessment District and corresponding Cover Letter to begin the process of undergrounding utilities. I further move to direct staff to contact the individuals interested in serving as 'District Captains' for the initial assessment districts.*

## **ATTACHMENTS**

1. Petition for Special Assessment District
2. Cover Letter for Petitions

April , 2011

Dear Covenant Member,

You are receiving this letter and petition form because an interest has been expressed in beginning the application process for undergrounding utilities in your neighborhood.

The Rancho Santa Fe Association, in conjunction with the Rancho Santa Fe Community Services District (CSD), has divided the Covenant into a number of potential assessment districts to facilitate the undergrounding process. These assessment districts will serve as a financing mechanism to implement utility undergrounding. Each district needs a District Captain, a volunteer that owns property in your district, who will facilitate the application process for your district.

Enclosed is a petition which will have to be submitted in order to form the special assessment district. Please fill out the petition and return it to your District Captain along with a \$2,000 deposit check for your property to complete the application process. This deposit will contribute to the cost of an engineering assessment study to determine the overall cost estimate for undergrounding, as well as property-specific costs based on the benefit each property will receive. This deposit is required from a sufficient number of property owners to move the application forward. Once the petitions and deposit checks are collected, the application process will proceed as follows:

- Your District Captain will submit the signed petitions to the CSD Board for review. If the CSD Board deems that the proposed district is eligible to proceed, the engineering assessment study will be prepared by an assessment engineer, and your \$2,000 deposit becomes non-refundable.
- If the CSD Board rejects the application for your proposed assessment district, your \$2,000 deposit will be refunded and the process will not move forward.
- Once the engineering assessment study is complete and has been accepted by the CSD staff, the CSD Board will vote to adopt the study and subsequently conduct a public vote of all the property owners in the proposed assessment district.
- You will receive notice of a public hearing where all property owners of the proposed assessment district are invited to attend and express their support or opposition. At the close of the public hearing, the CSD Board will tally all of the ballots received.
- If the majority of the ballots oppose district formation, the process ends and no district is formed.

- If the majority of the ballots support district formation, the CSD then has the authority to form the assessment district. (It is important to note that if the majority of the ballots oppose district formation, the \$2,000 initial deposit will not be refunded as it was collected to prepare the engineering assessment study).
- If the assessment district vote is successful and the CSD Board subsequently votes to form the assessment district, you will be notified by mail.

The cost of the assessment for each individual property (as outlined in the engineering assessment study) can be paid up front all at one time, or you may choose to pay over time as a part of your property tax bill. Additionally, the cost to underground existing overhead utility lines from the edge of your property to your residence will not be financed by the assessment district; they must be provided and paid for individually. ?

Congratulations on taking the first step to underground your utilities! Please contact the Association office at (858) 756-1174 if you have questions. Thank you.

Sincerely,

Pete Smith,

Association Manager

**PETITION FOR SPECIAL ASSESSMENT DISTRICT  
FOR THE PURPOSE OF UTILITY UNDERGROUNDING**

We are the owners (the "Owners") of the properties located within that portion of the Rancho Santa Fe Community Services District (the "CSD") identified as District # \_\_\_\_ (the "District") as shown in the Rancho Santa Fe Association Undergrounding Districts Evaluation Report, and also as shown in the map attached to this petition as Attachment A hereto.

The Owners respectfully petition the Board of Directors of the CSD (the "CSD Board") to initiate proceedings to consider the formation of an assessment district for the purpose of financing the costs of undergrounding existing overhead utilities [and extending natural gas lines where feasible].

We, the Owners, understand that if an assessment district is formed as we have petitioned, the following costs will be assessed against all benefitting properties:

1. The cost of the design, engineering, plan checking, legal, administrative, and incidental costs and other expenses related to preparation and execution of the undergrounding project;
2. The costs of the acquisition of additional right-of-way, if any, necessary for the location of the underground utilities and any related above-ground facilities such as cabinets or pedestals;
3. The costs of the removal of the overhead utilities and the installation of the underground utilities; and
4. The costs of forming the assessment district and the financing costs related to the issuance of bonds to finance all of the above costs, and any annual cost of administering the assessment district and any bonds issued for the assessment district.

We, the Owners, further understand that:

1. The record owners of properties proposed to be assessed will receive notice of a public hearing to be held by the CSD Board. At such public hearing, any interested person may present written or oral testimony and the CSD Board will consider all statements by owners, both those in favor of and those opposed to the formation of the proposed assessment.
2. The record owners of the properties proposed to be assessed will also receive an assessment ballot by which such record owners may express their support for or opposition to the proposed assessment.
3. All assessment ballots received by the CSD prior to the conclusion of the public hearing will be tabulated following the conclusion of such public hearing. The CSD Board shall have the authority to form the assessment district and levy the proposed

assessments only if the assessment ballots submitted in favor of the levy exceed the assessment ballots submitted in opposition to such levy. In tabulating the assessment ballots, the assessment ballot for each parcel is weighted by the amount of the assessment proposed to be levied on such parcel.

4. If, upon collection of a signed petition form and the required \$2,000 deposit from each petitioner, the CSD determines not to accept the petition, each of our deposits will be refunded. However, once the CSD accepts the petition and prepares an Assessment Engineer's Report each of our deposits is non-refundable.

We, the Owners, further understand that if the vote to form the assessment district is successful and the CSD forms an assessment district benefitting our property, then:

1. The costs to underground existing overhead utility lines from the edge of our property to our residence or any accessory structures will not be financed through the assessment district, but must be provided and paid for individually.

2. Each property owner may pay the assessment either in cash at the completion of the individual district formation, or in installments with interest according to the terms of the bond used to finance the assessment district.

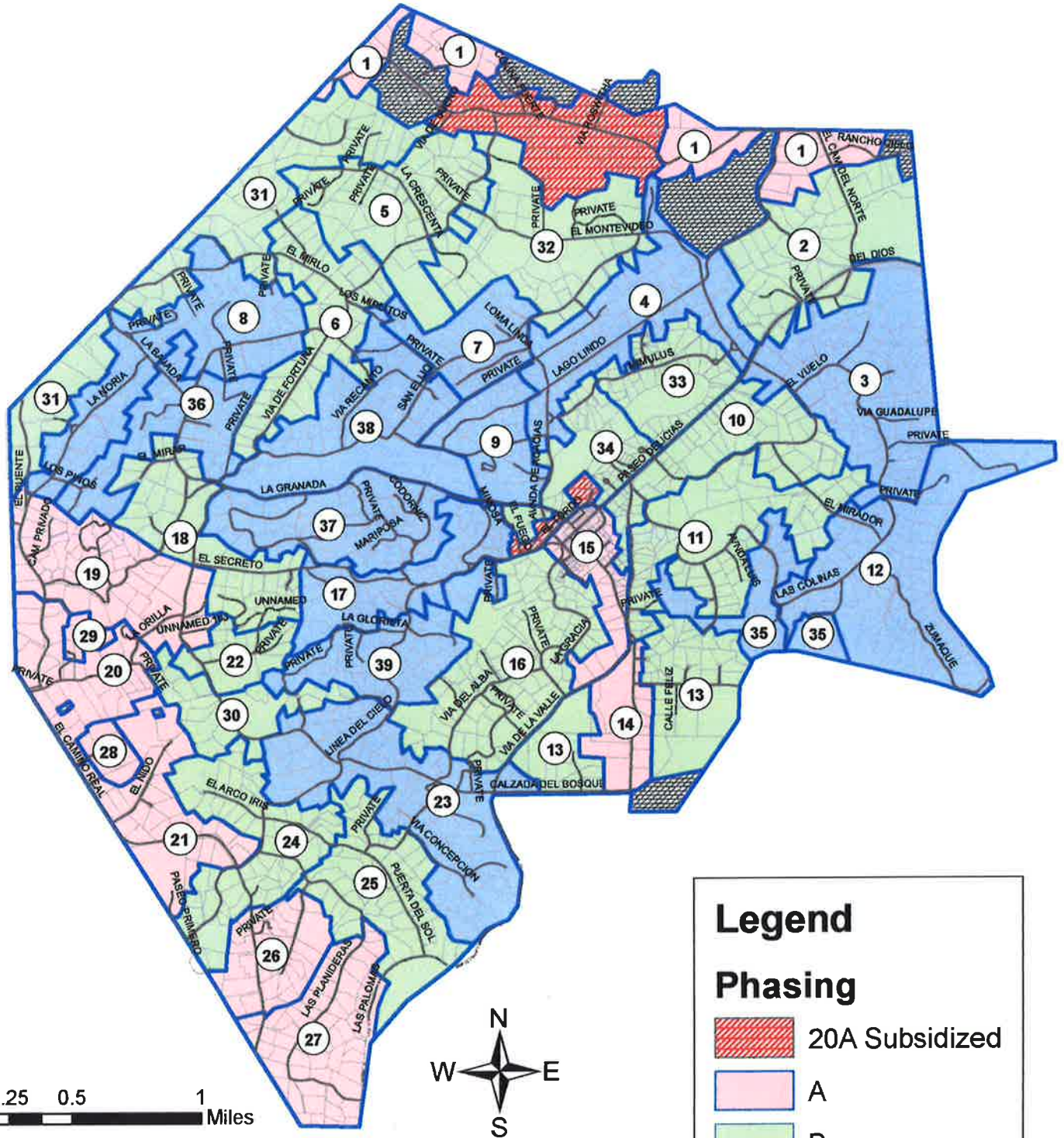
3. Property owners who contribute funds to the application fees required for the submission of this petition will receive credit toward their assessment in an amount equal to their specific contribution.

In submitting this petition, we, the Owners, are not waiving our right (a) to testify orally or in writing at the public hearing described above, (b) to object or protest the levy of the assessments if we do not agree with the amount of the assessment proposed to be levied on our property, or (c) to submit an assessment ballot in opposition to the levy of the proposed assessment on our property if we do not agree with the amount of such proposed assessment, or for any other reason.

This petition is respectfully submitted by:




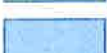

_____ Name of property owner(s)	_____ Street Address	_____ APN
_____ Mailing Address	_____ Telephone	_____ Email
_____ Signature	_____ Date	
_____ Signature	_____ Date	

# Utility Undergrounding Districts



**Legend**

**Phasing**

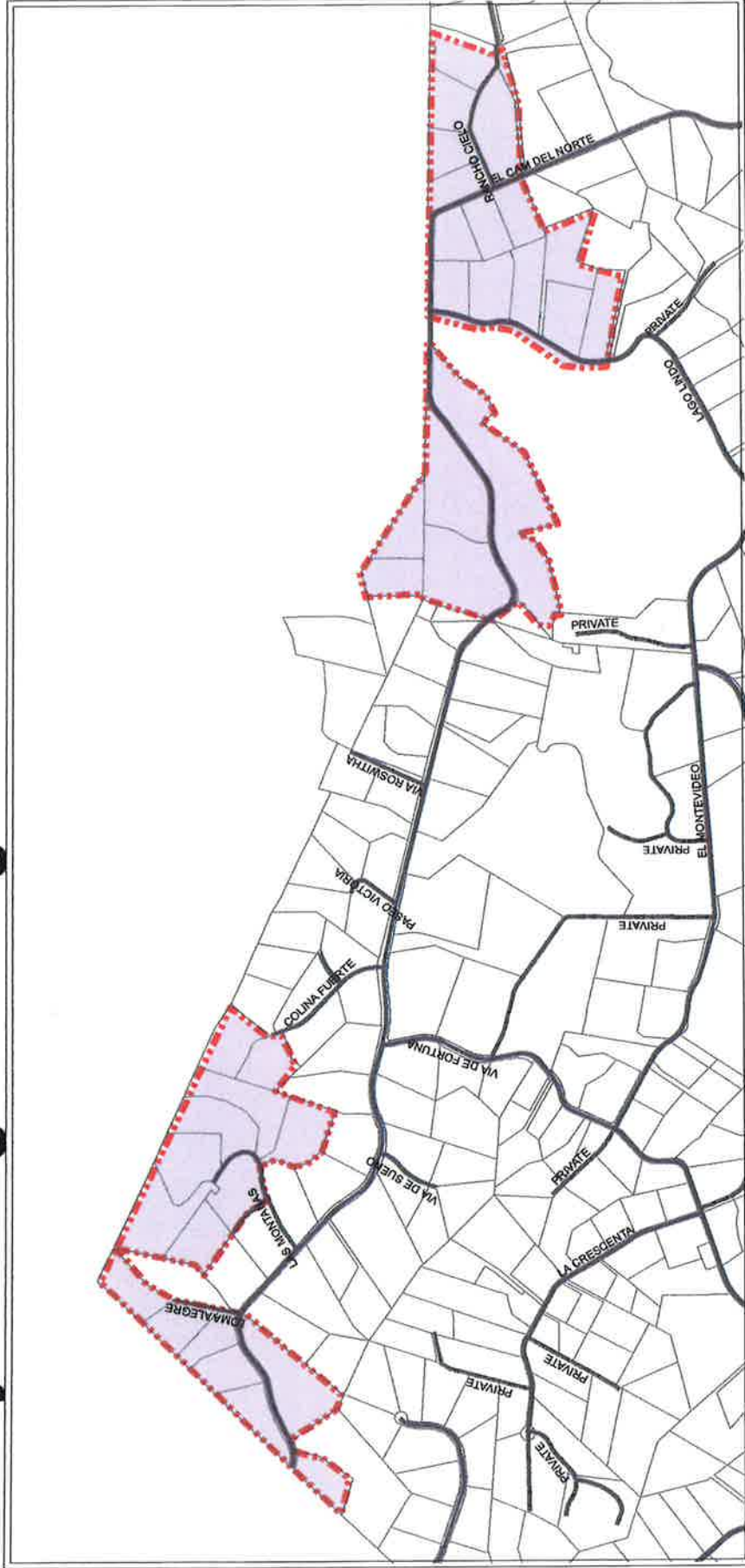
-  20A Subsidized
-  A
-  B
-  C
-  No Project



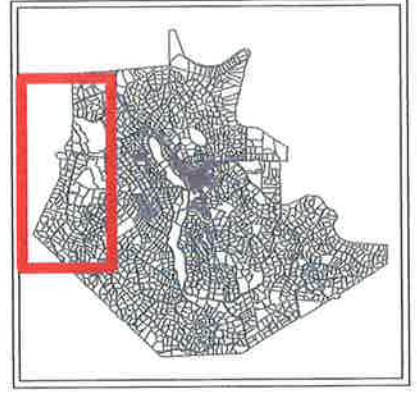
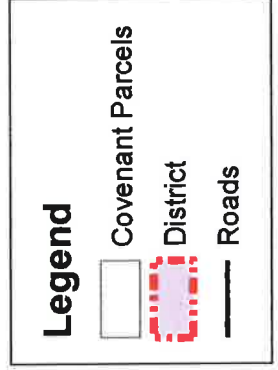
Map by: Liz Avalon, Associate Planner  
 April 19, 2010



# Utility Undergrounding District Detail

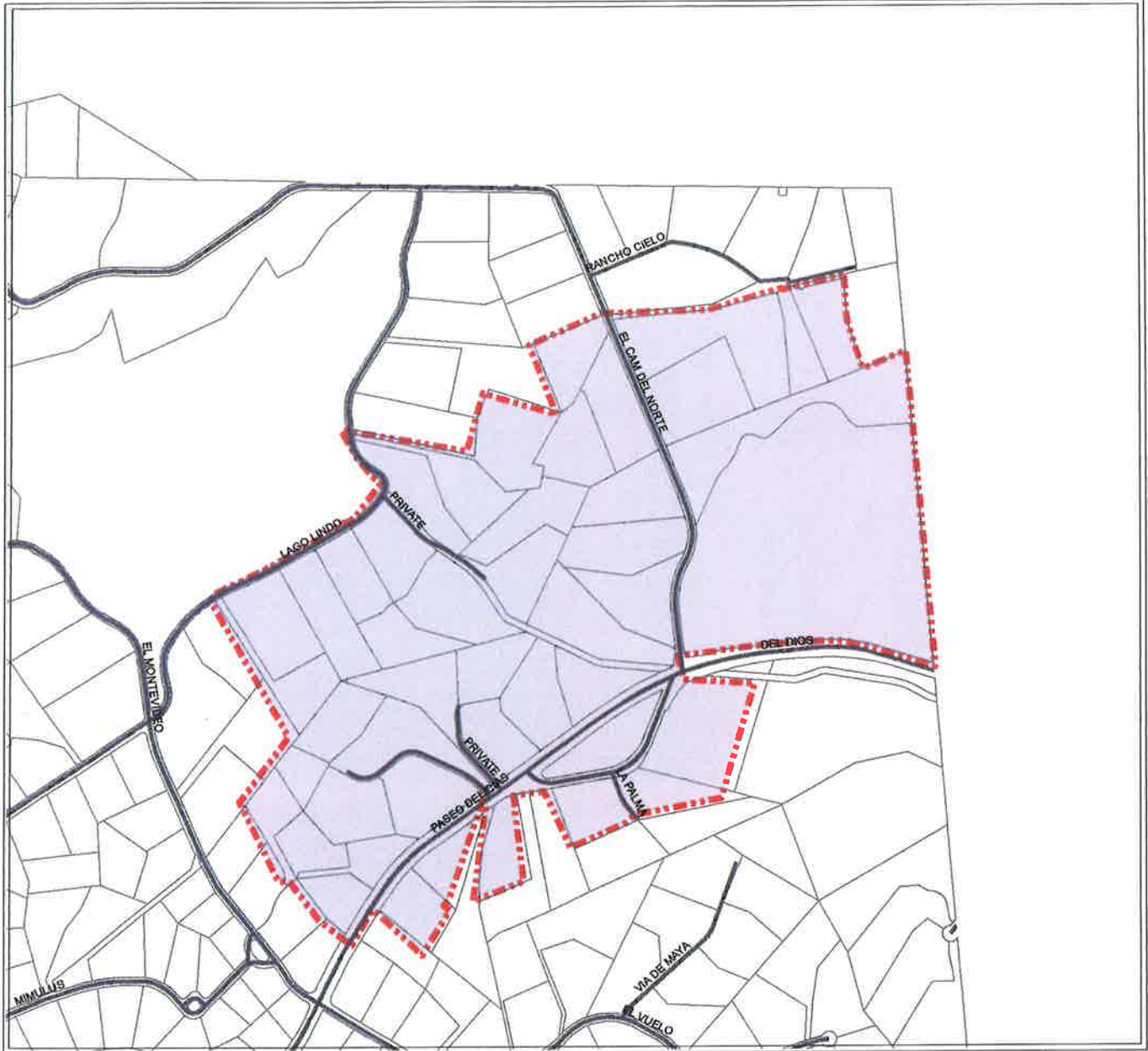


## District 1 -- Phase A, 19 Parcels



Map by: Liz Avalon, Associate Planner  
May 12, 2010

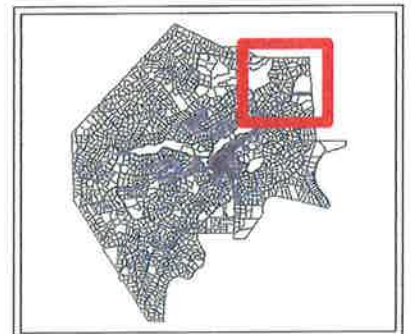
# Utility Undergrounding District Detail



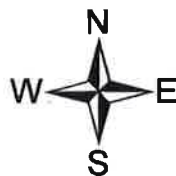
## Legend

-  Covenant Parcels
-  District
-  Roads

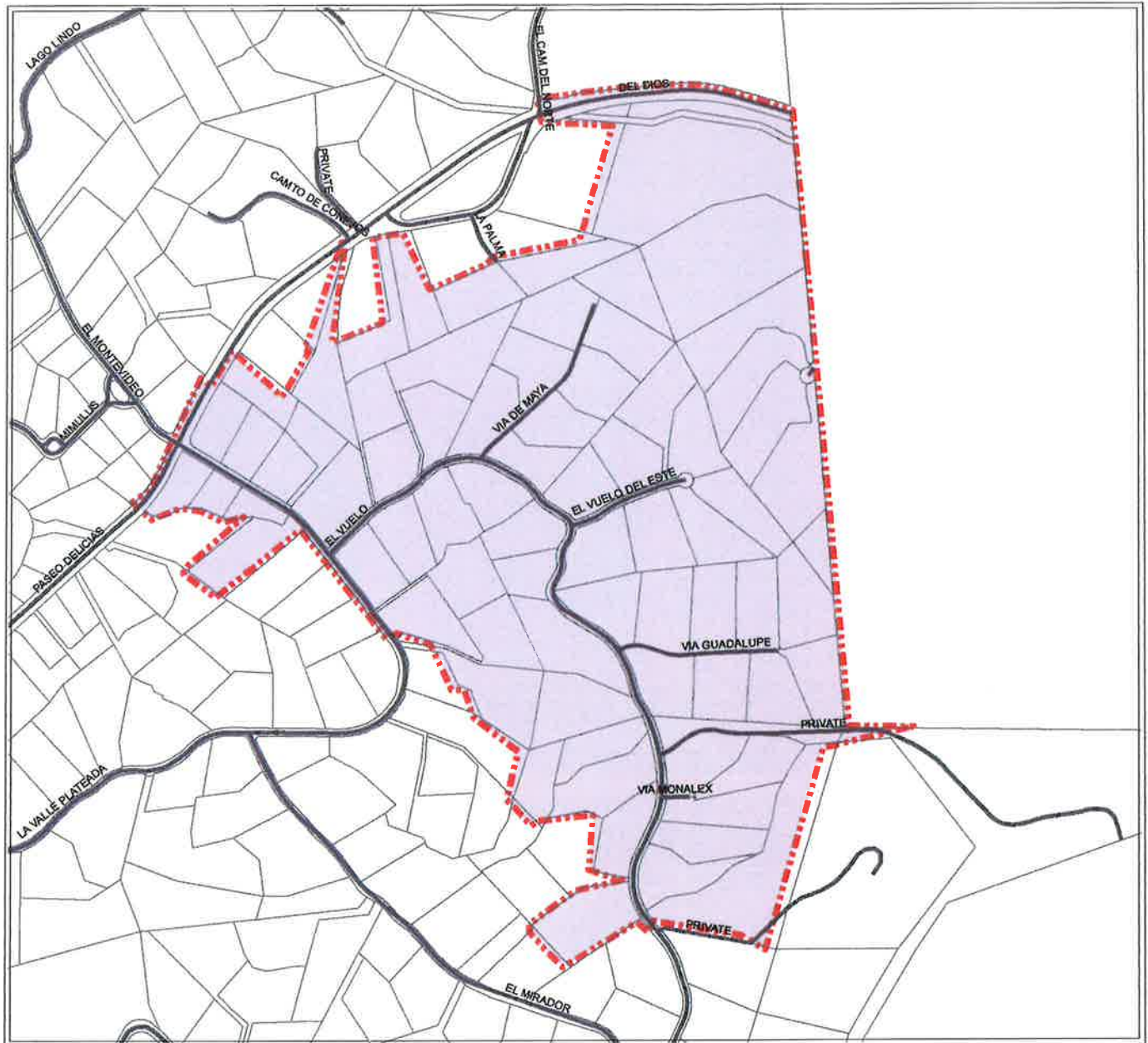
## District 2 -- Phase B, 44 Parcels



Map by: Liz Avalon, Associate Planner  
May 12, 2010



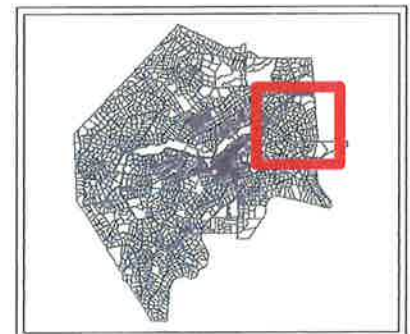
# Utility Undergrounding District Detail



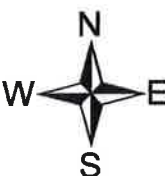
**Legend**

- Covenant Parcels
- District
- Roads

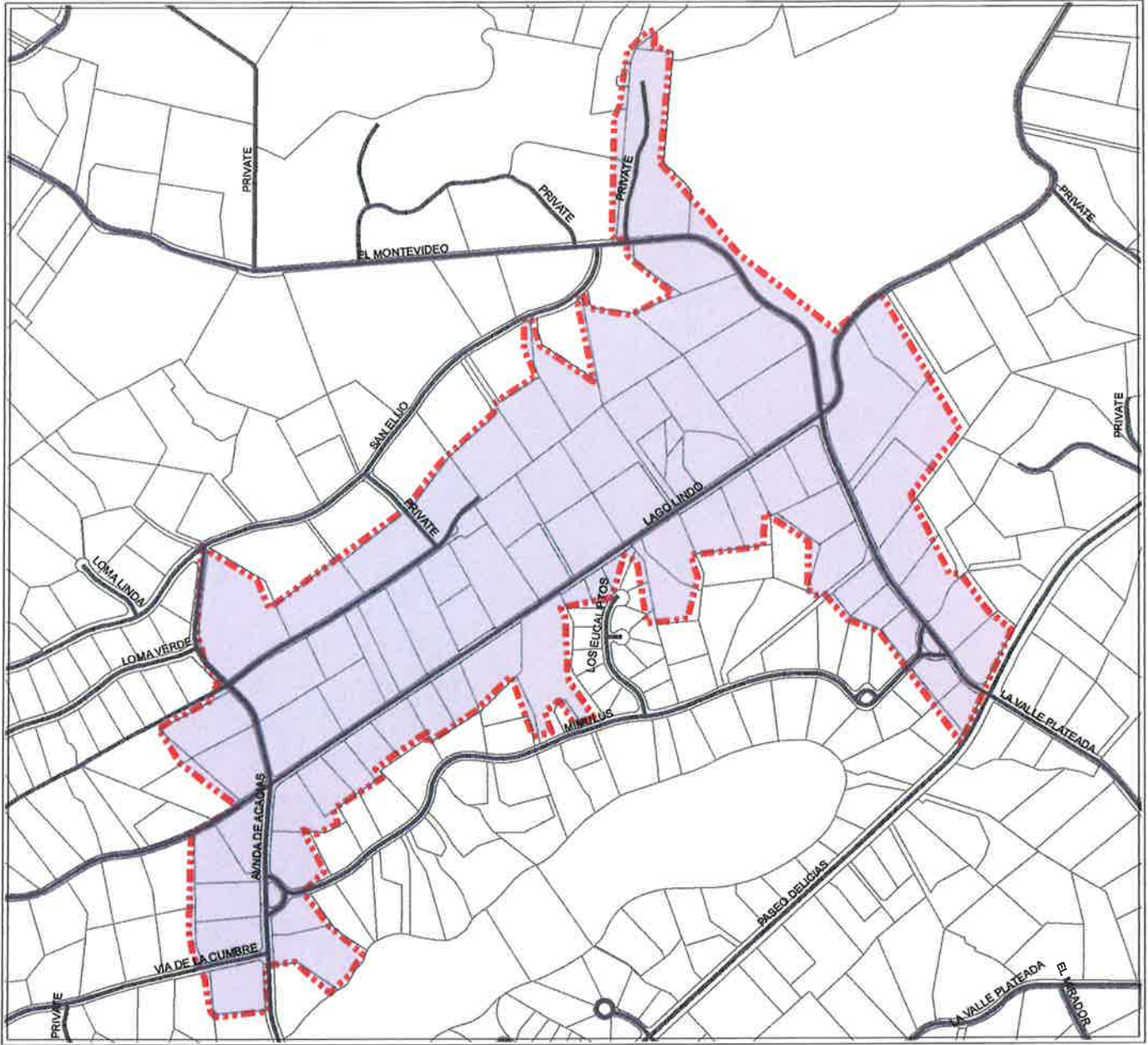
## District 3 -- Phase C, 75 Parcels



Map by: Liz Avalon, Associate Planner  
May 12, 2010






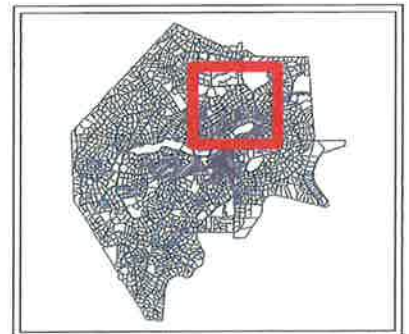
# Utility Undergrounding District Detail



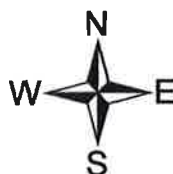
## District 4 -- Phase C, 78 Parcels

**Legend**

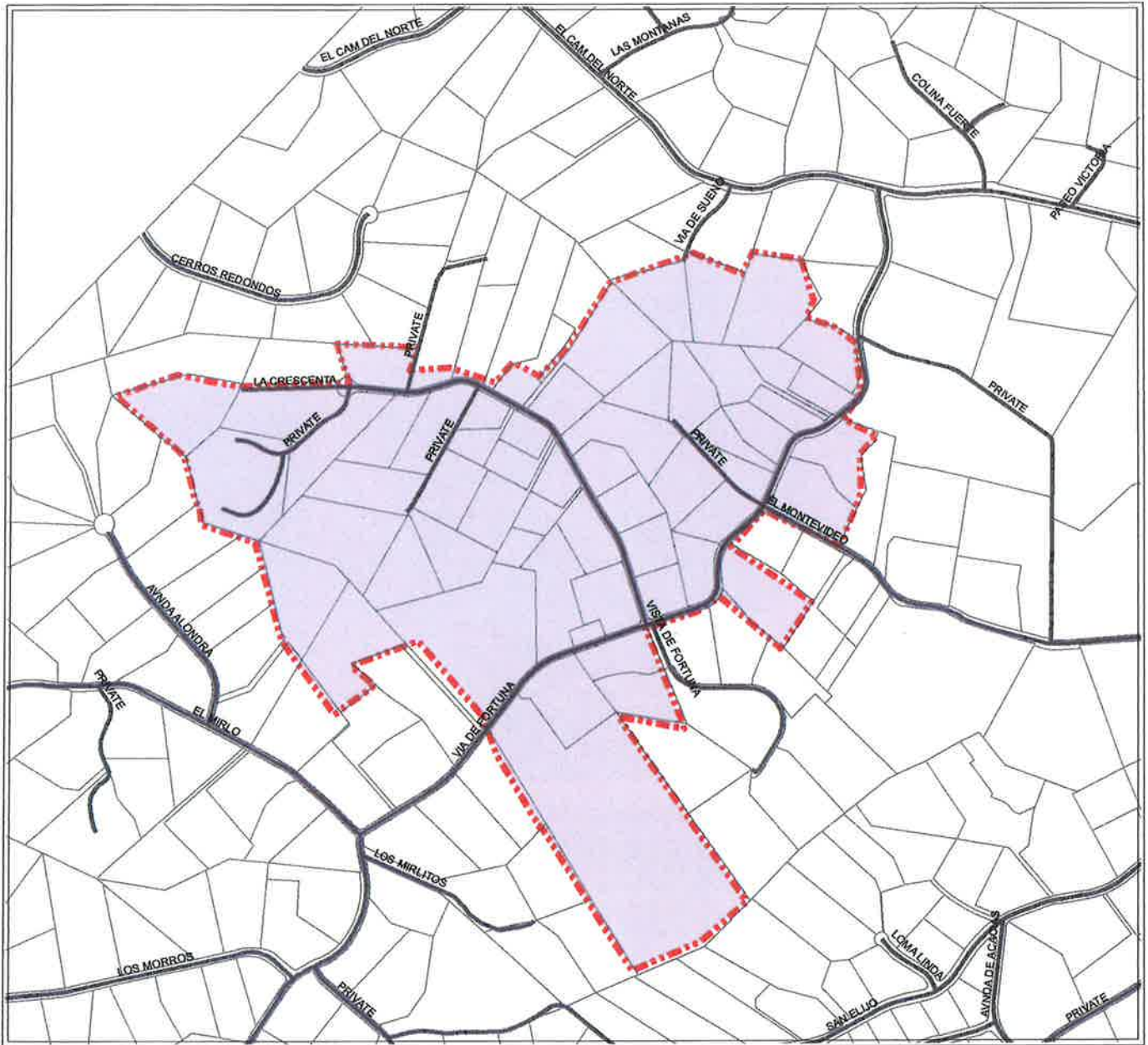
-  Covenant Parcels
-  District
-  Roads






Map by: Liz Avalon, Associate Planner  
May 12, 2010



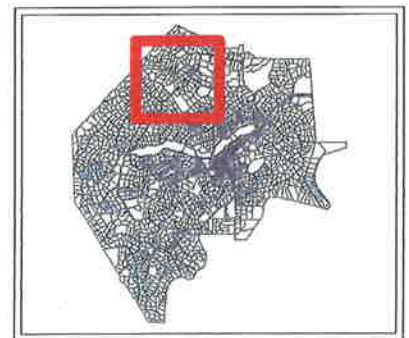
# Utility Undergrounding District Detail



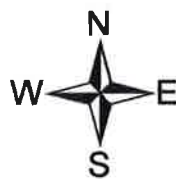
**Legend**

-  Covenant Parcels
-  District
-  Roads

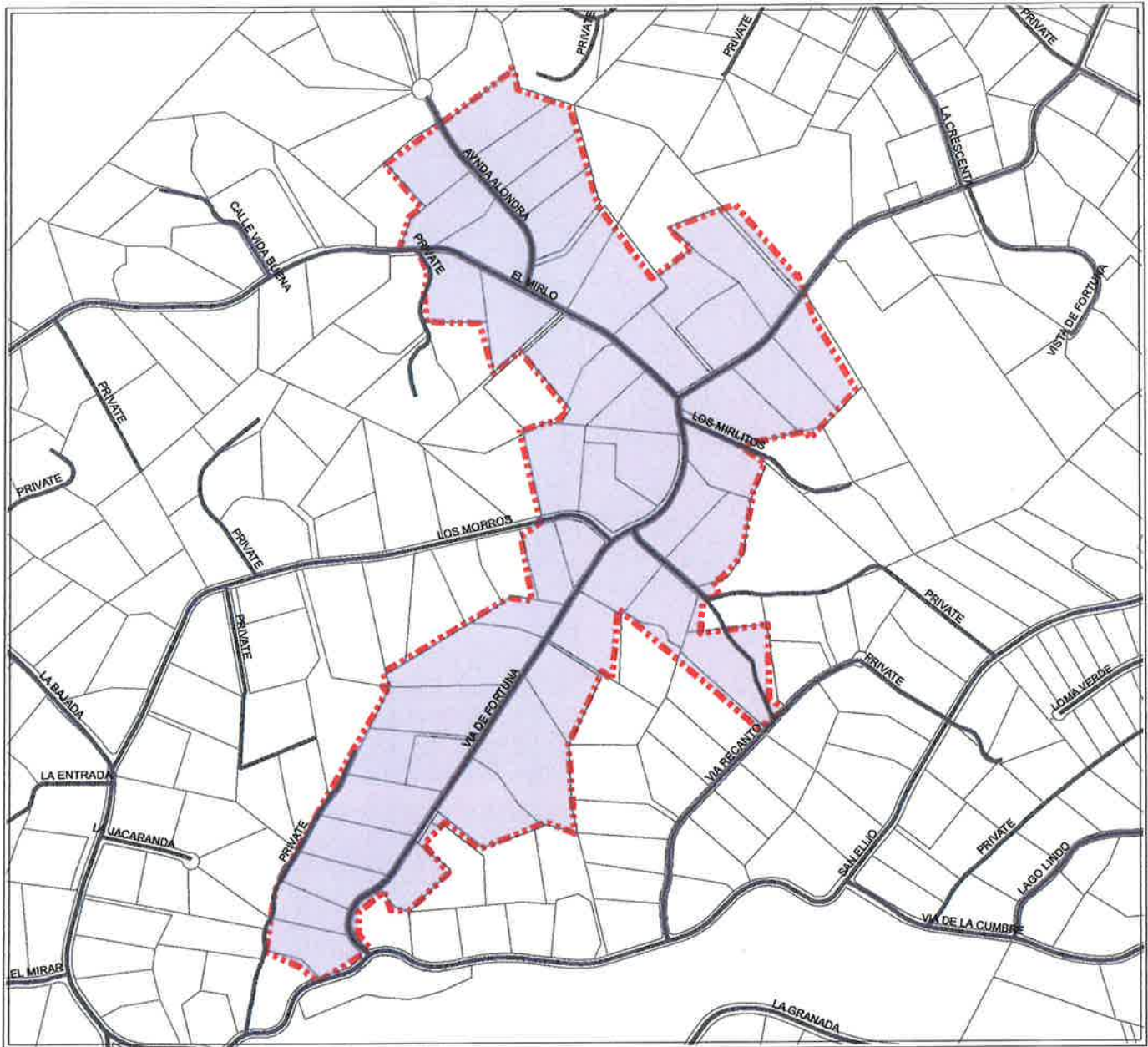
## District 5 -- Phase B, 58 Parcels



Map by: Liz Avalon, Associate Planner  
May 12, 2010






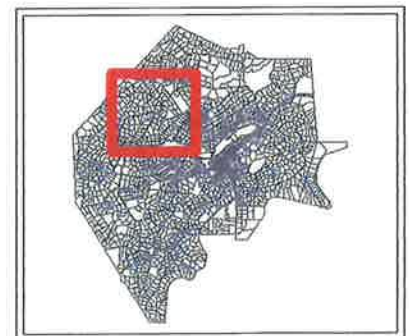
# Utility Undergrounding District Detail



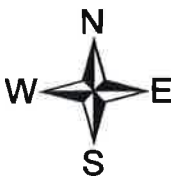
## District 6 -- Phase B, 47 Parcels

**Legend**

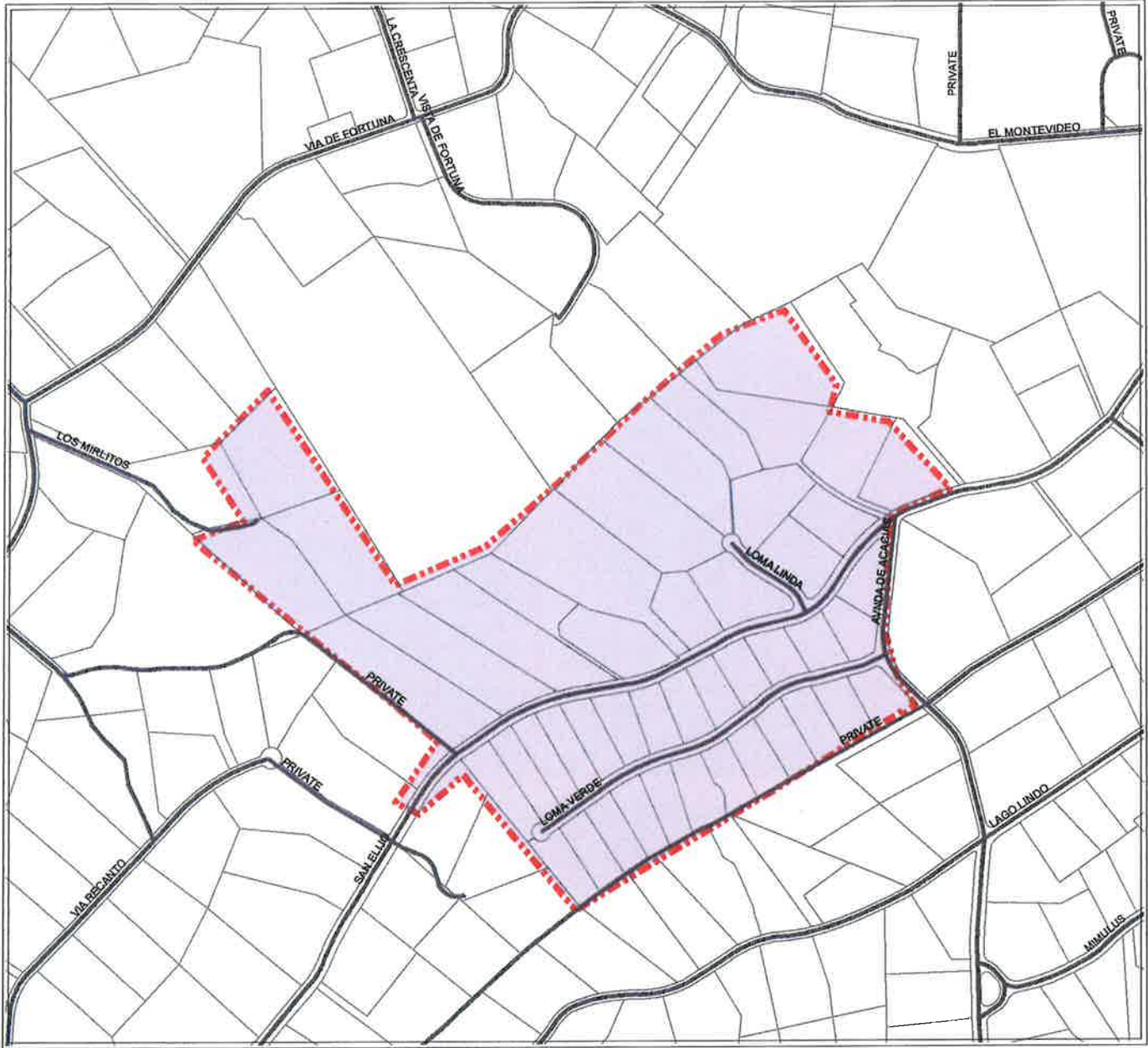
-  Covenant Parcels
-  District
-  Roads



Map by: Liz Avalon, Associate Planner  
 May 12, 2010



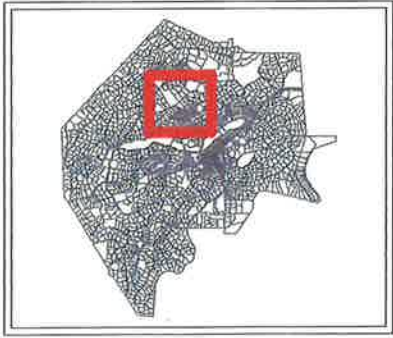
# Utility Undergrounding District Detail



**Legend**

- Covenant Parcels
- District
- Roads

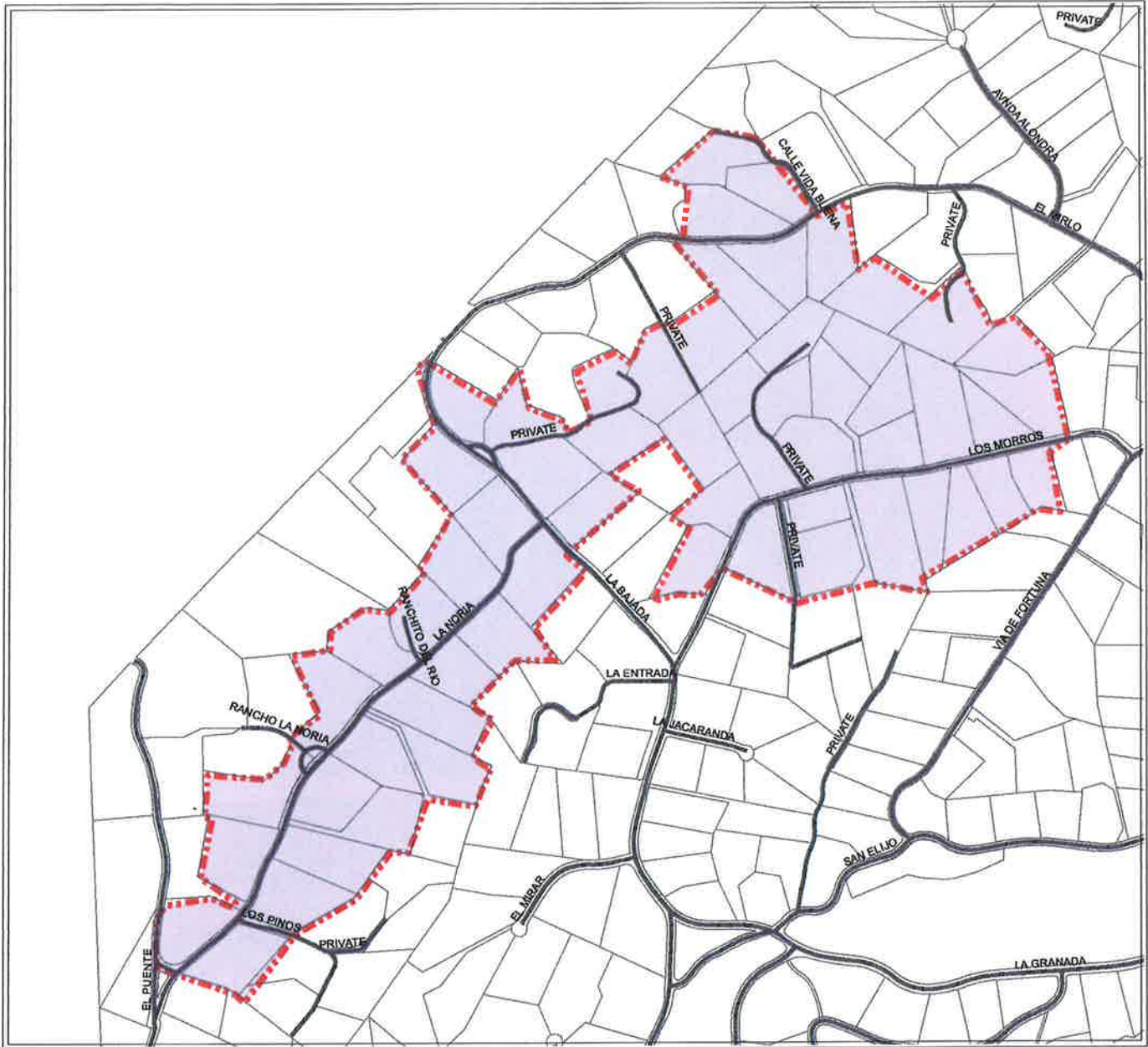
## District 7 -- Phase C, 47 Parcels



Map by: Liz Avalon, Associate Planner  
May 12, 2010



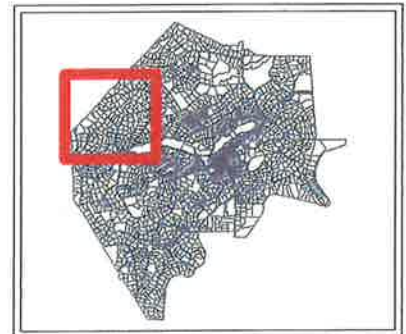
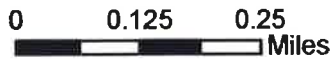
# Utility Undergrounding District Detail



**Legend**

- Covenant Parcels
- District
- Roads

## District 8 -- Phase C, 60 Parcels

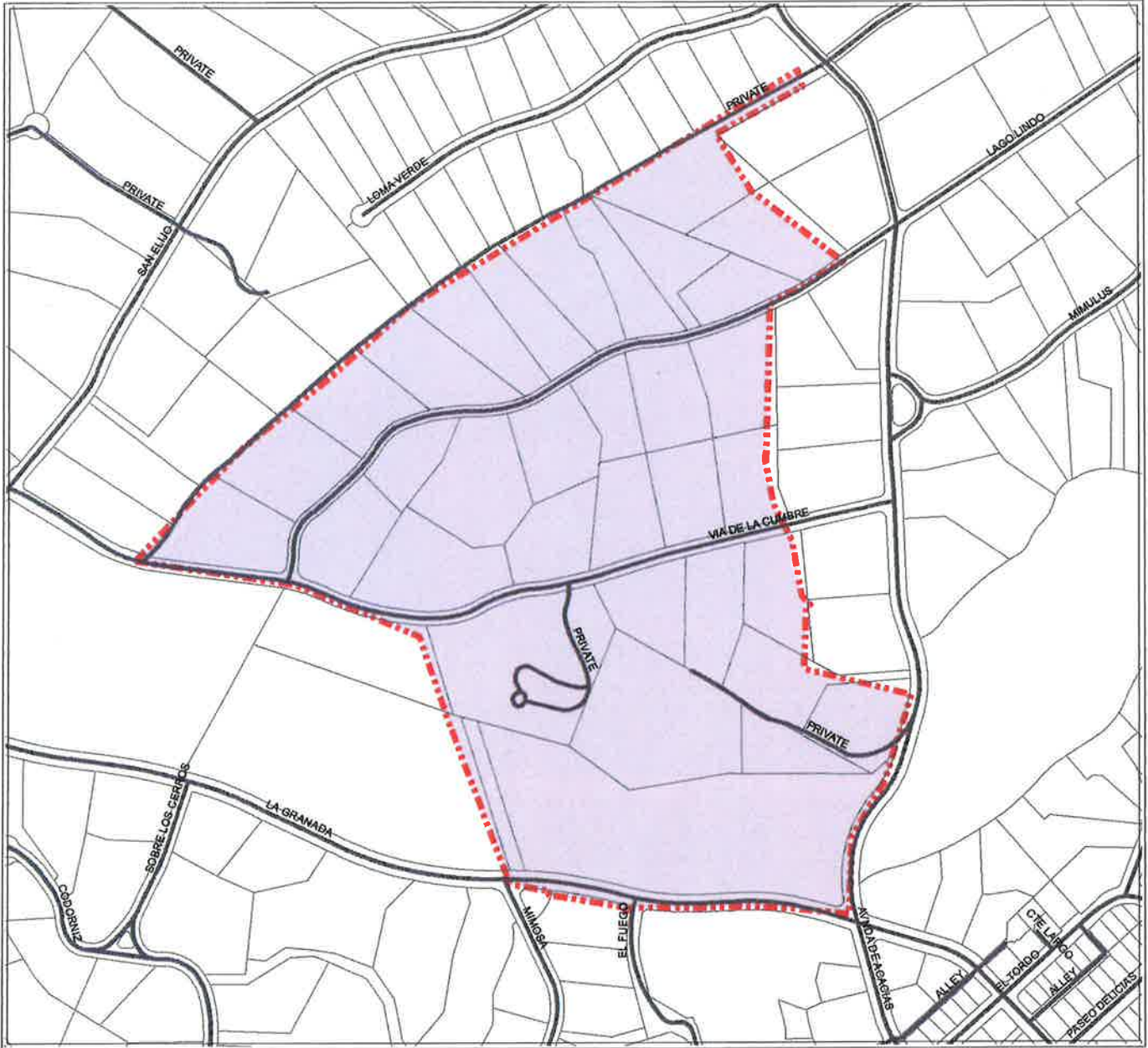


Map by: Liz Avalon, Associate Planner  
May 12, 2010





# Utility Undergrounding District Detail

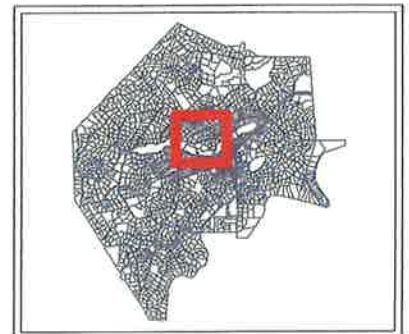


## Legend

- Covenant Parcels
- District
- Roads

## District 9 -- Phase C, 33 Parcels

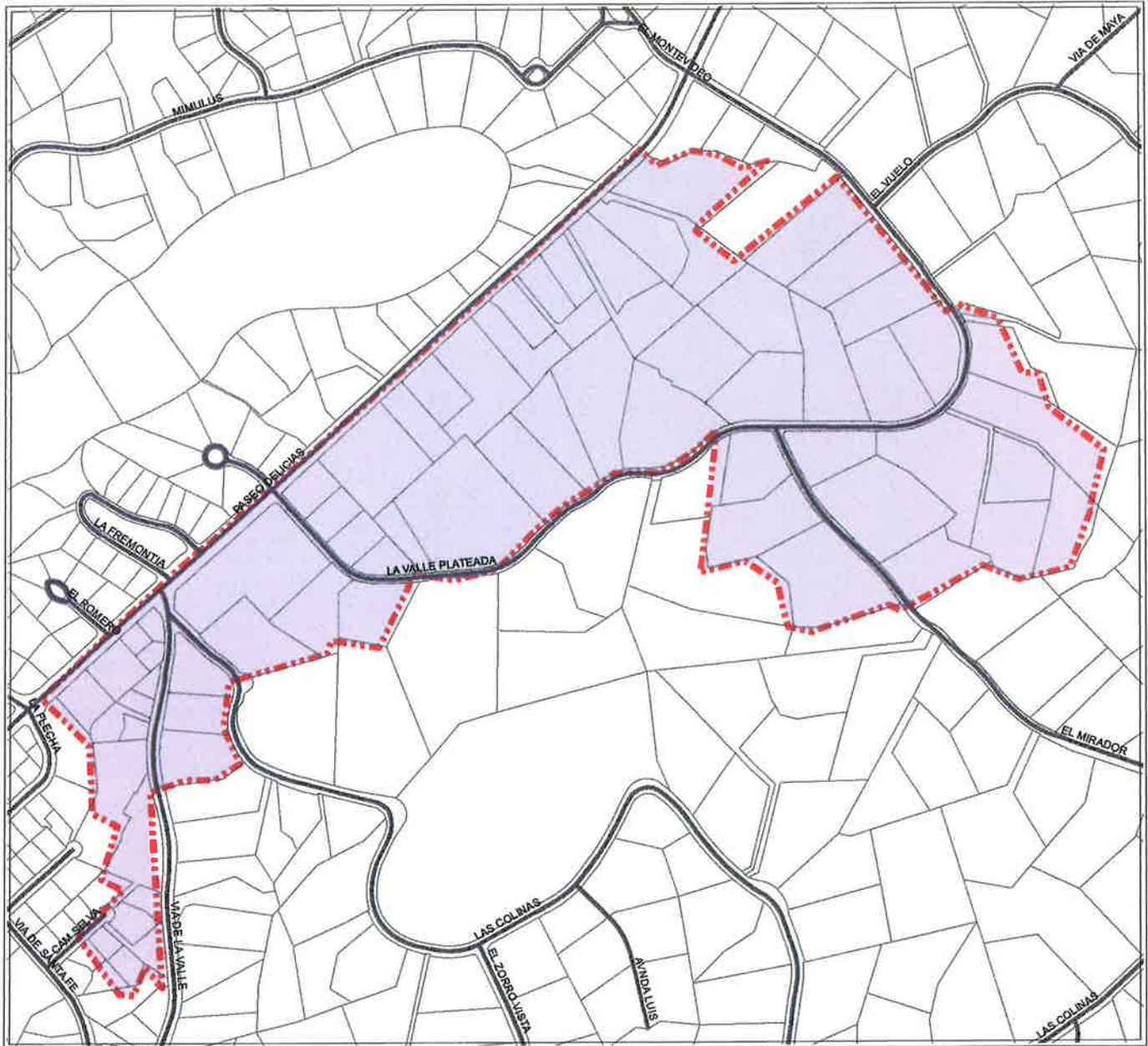
0 0.125 0.25 Miles



Map by: Liz Avalon, Associate Planner  
May 12, 2010



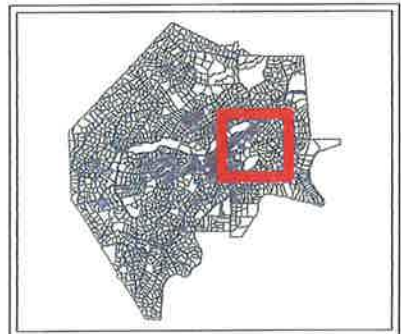
# Utility Undergrounding District Detail



**Legend**

- Covenant Parcels
- District
- Roads

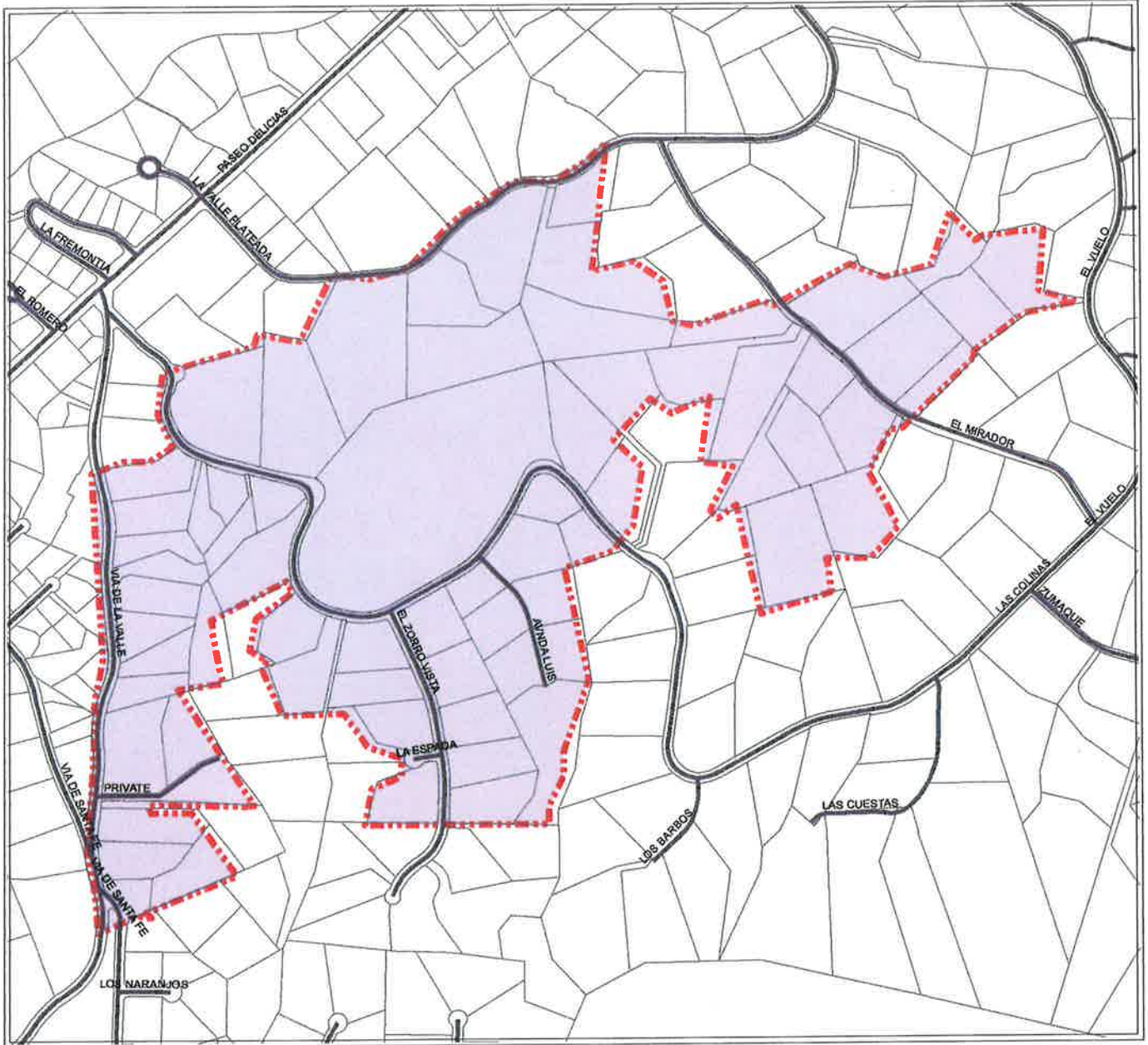
## District 10 -- Phase B, 32 Parcels



Map by: Liz Avalon, Associate Planner W  
May 12, 2010



# Utility Undergrounding District Detail

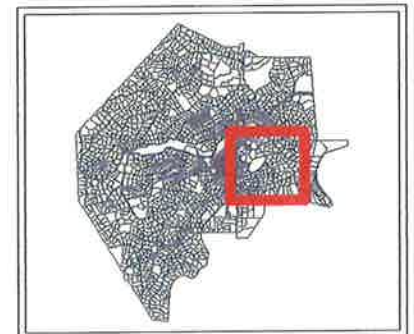


## Legend

-  Covenant Parcels
-  District
-  Roads

## District 11 -- Phase B, 68 Parcels

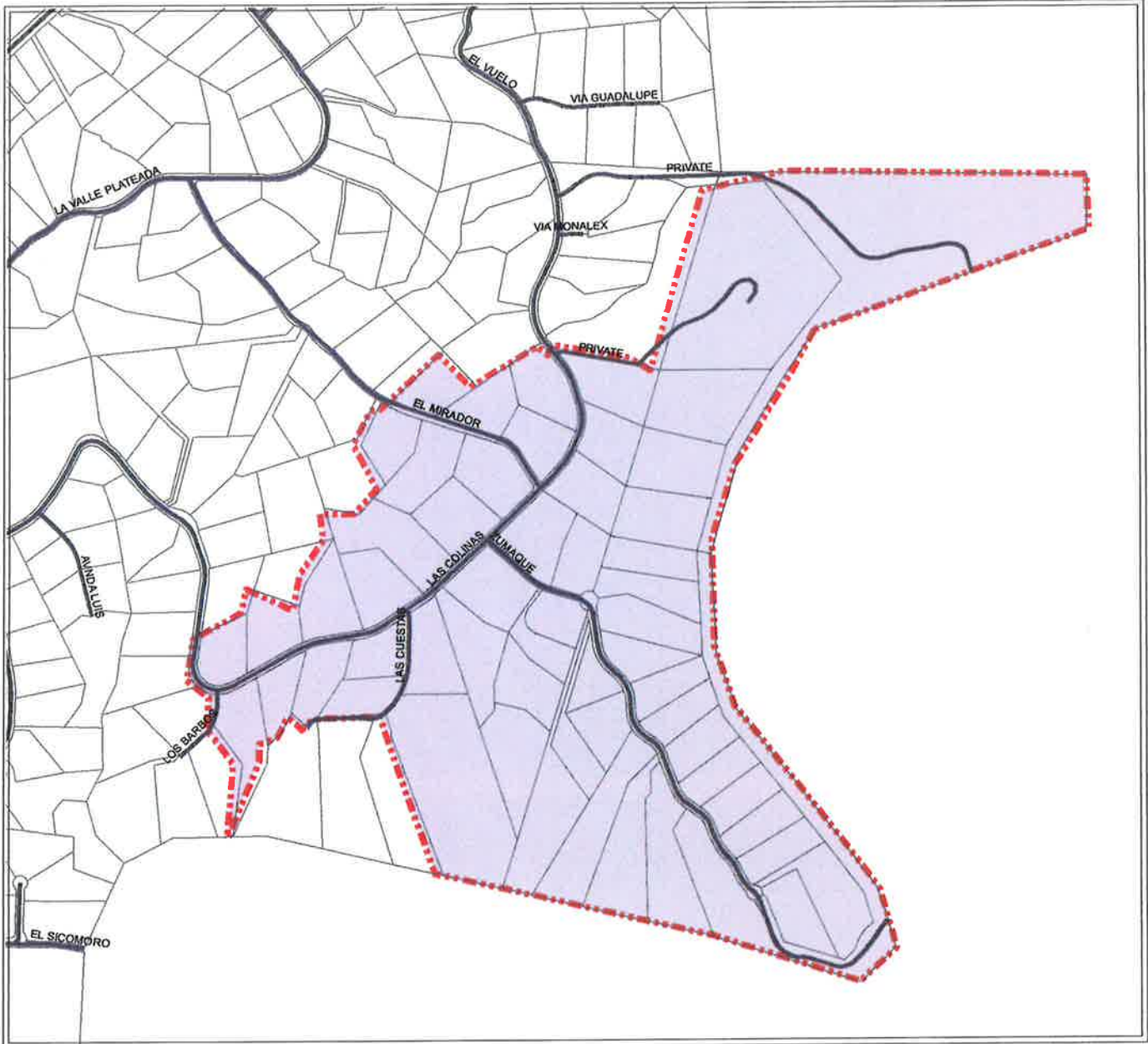
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Map by: Liz Avalon, Associate Planner W  
May 12, 2010



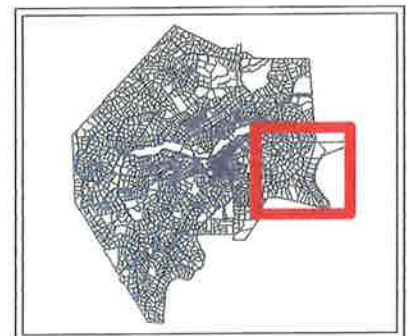
# Utility Undergrounding District Detail



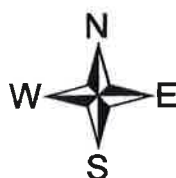
## District 12 -- Phase C, 57 Parcels

**Legend**

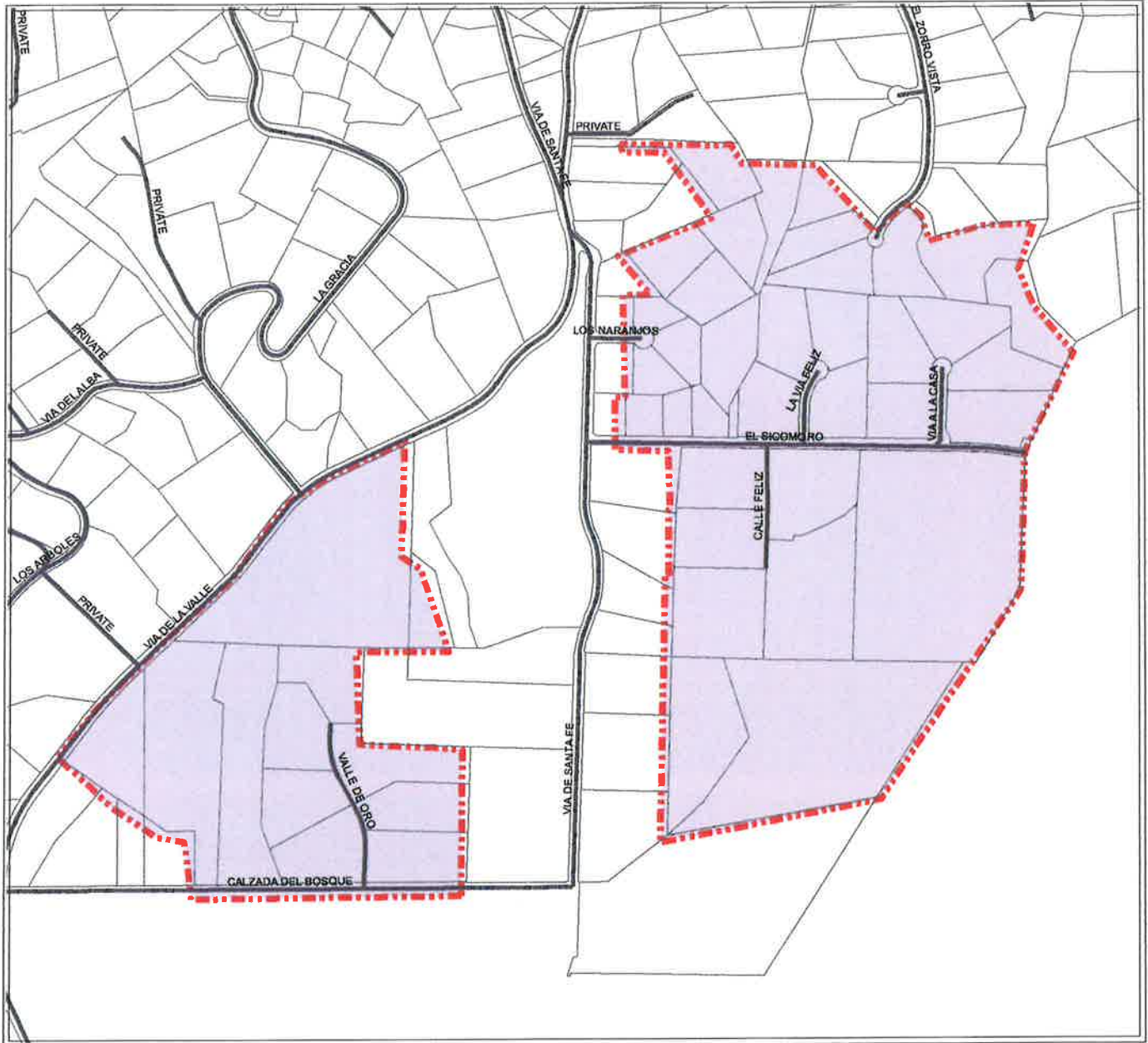
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010






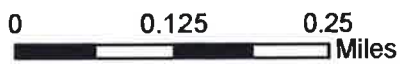
# Utility Undergrounding District Detail



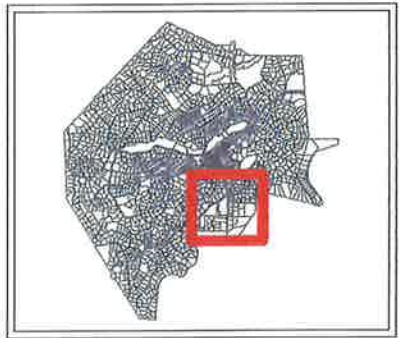
## District 13 -- Phase B, 48 Parcels

**Legend**

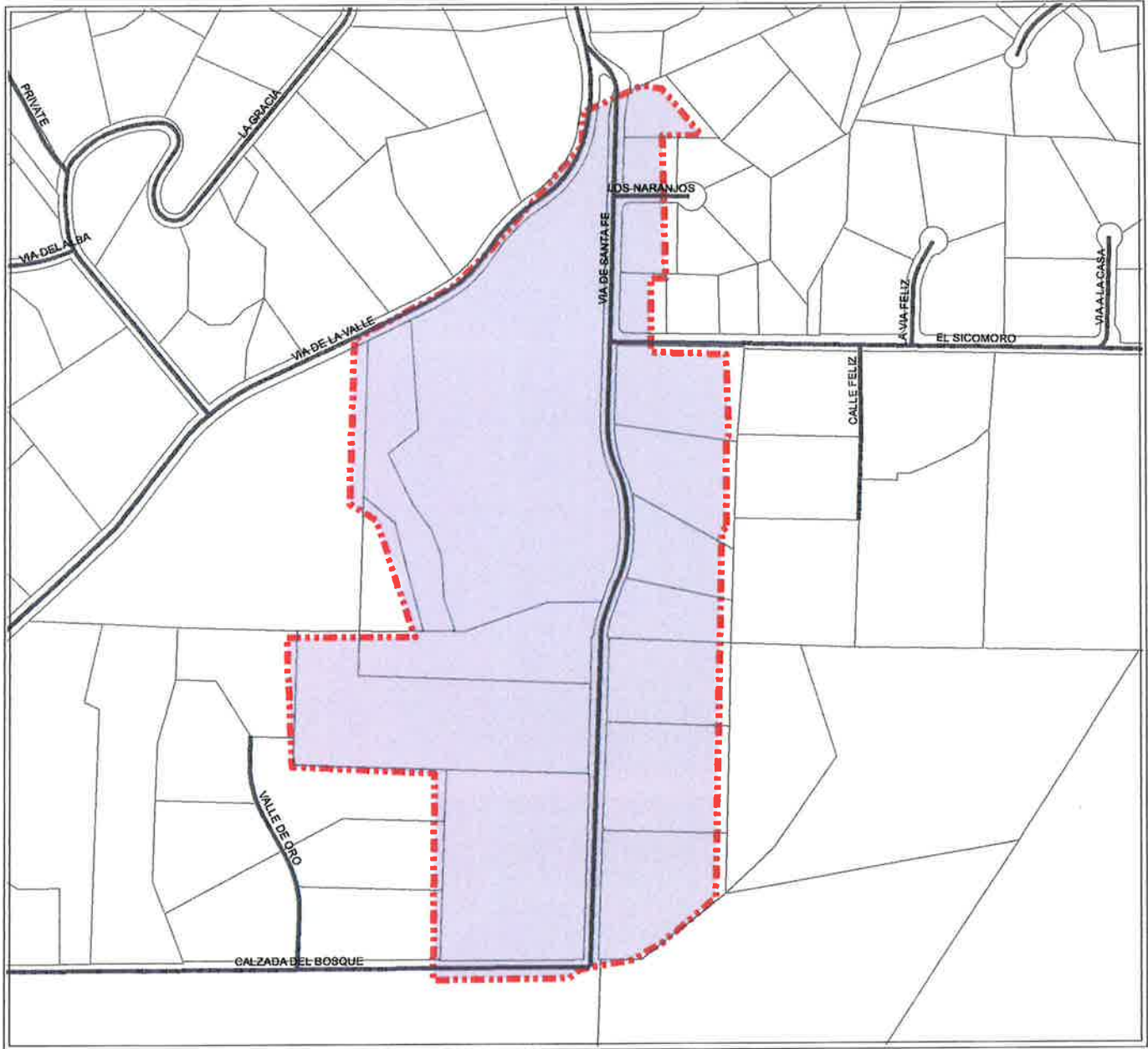
-  Covenant Parcels
-  District
-  Roads



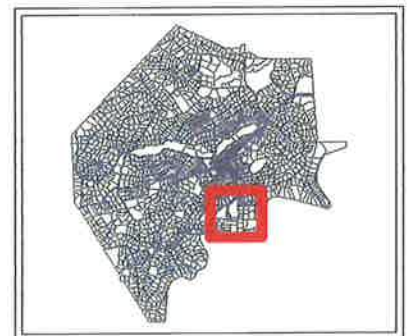
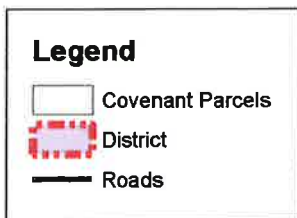
Map by: Liz Avalon, Associate Planner W  
May 12, 2010



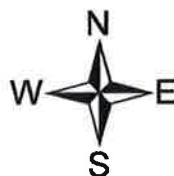
# Utility Undergrounding District Detail



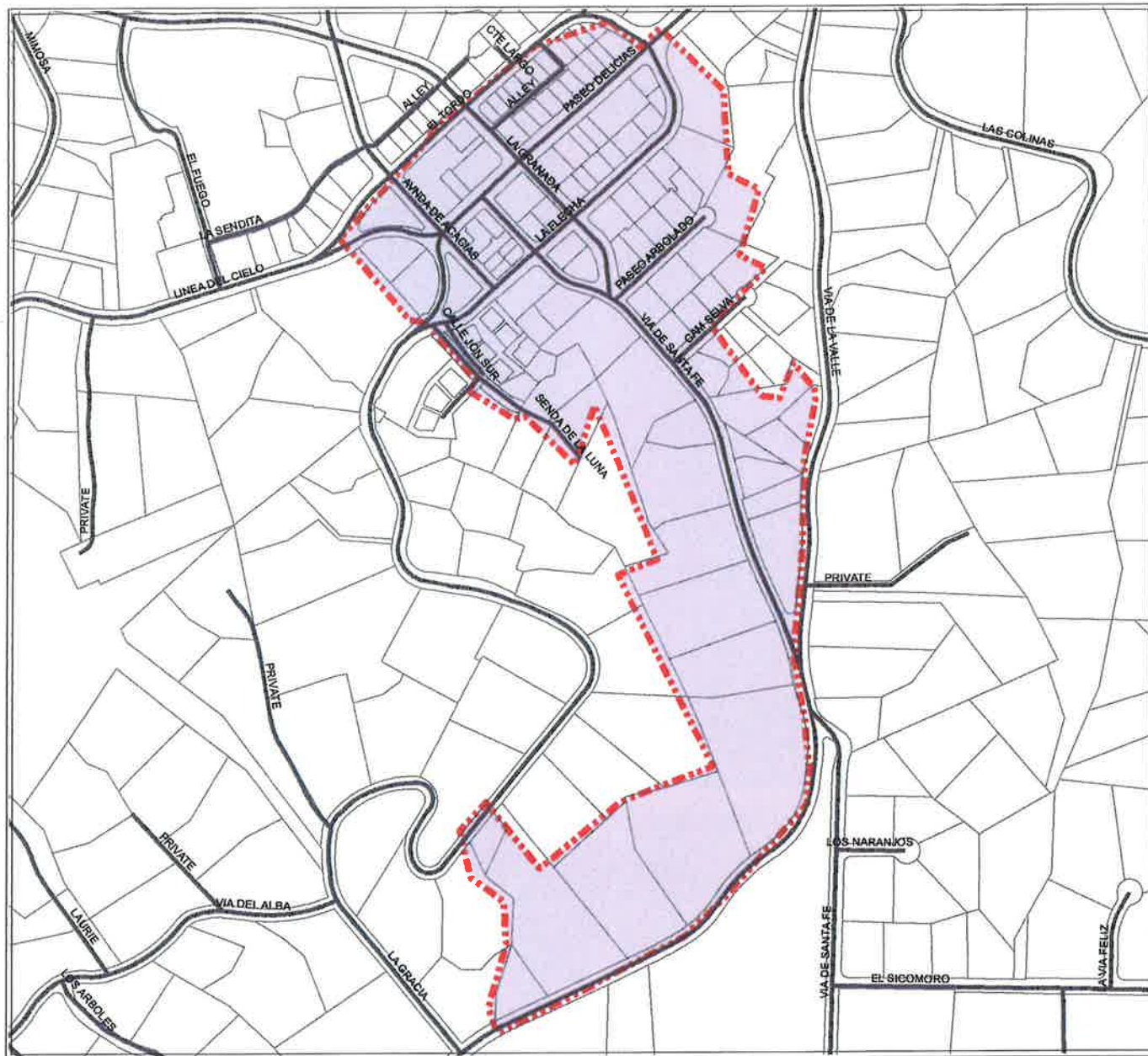
## District 14 -- Phase A, 17 Parcels



Map by: Liz Avalon, Associate Planner  
May 12, 2010






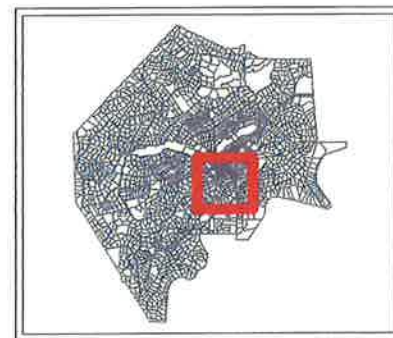
# Utility Undergrounding District Detail



## District 15 -- Phase A, 86 Parcels

**Legend**

-  Covenant Parcels
-  District
-  Roads



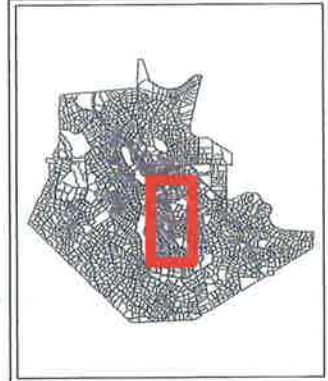
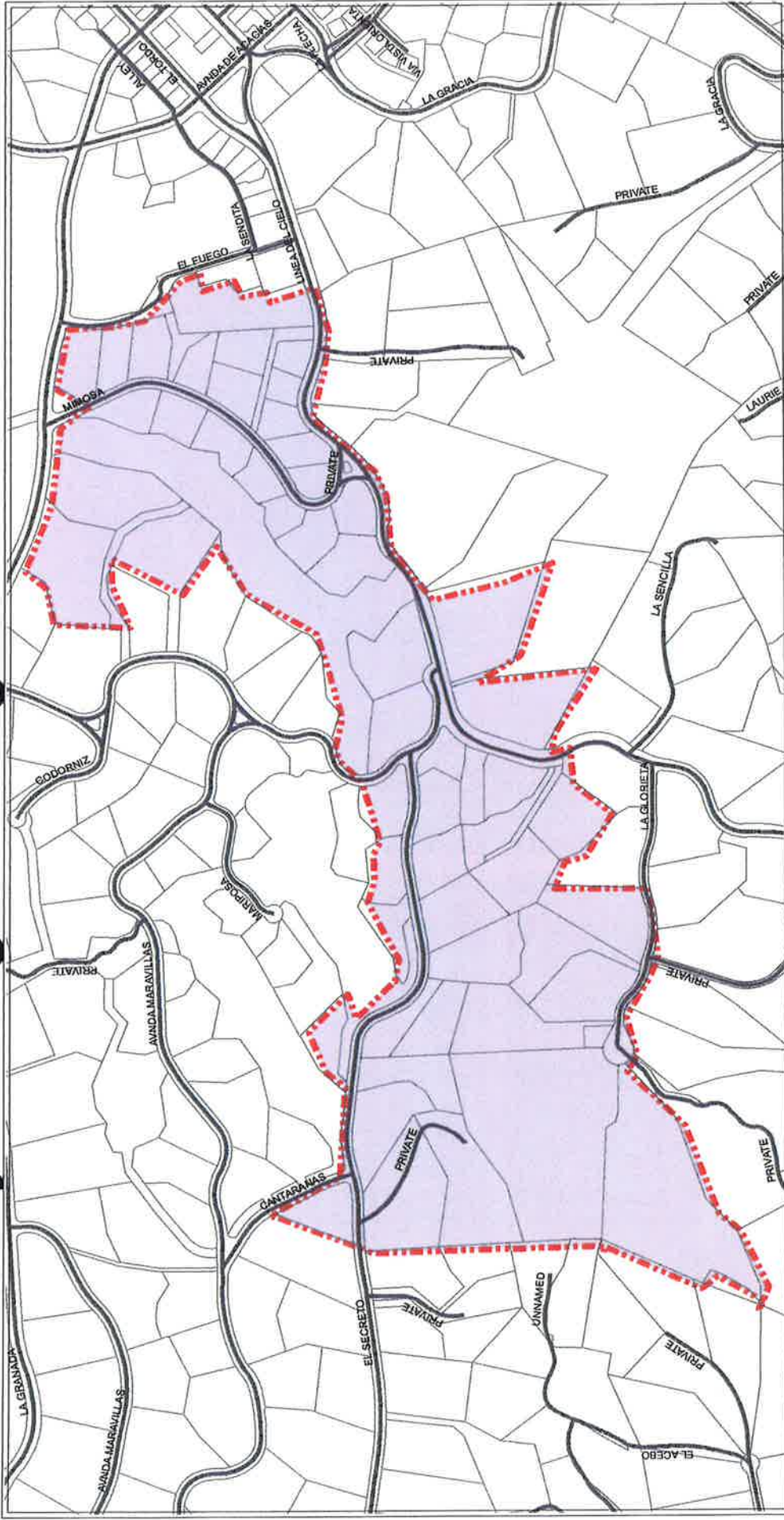
Map by: Liz Avalon, Associate Planner W  
 May 12, 2010







# Utility Undergrounding District Detail



**Legend**

- Covenant Parcels
- District
- Roads

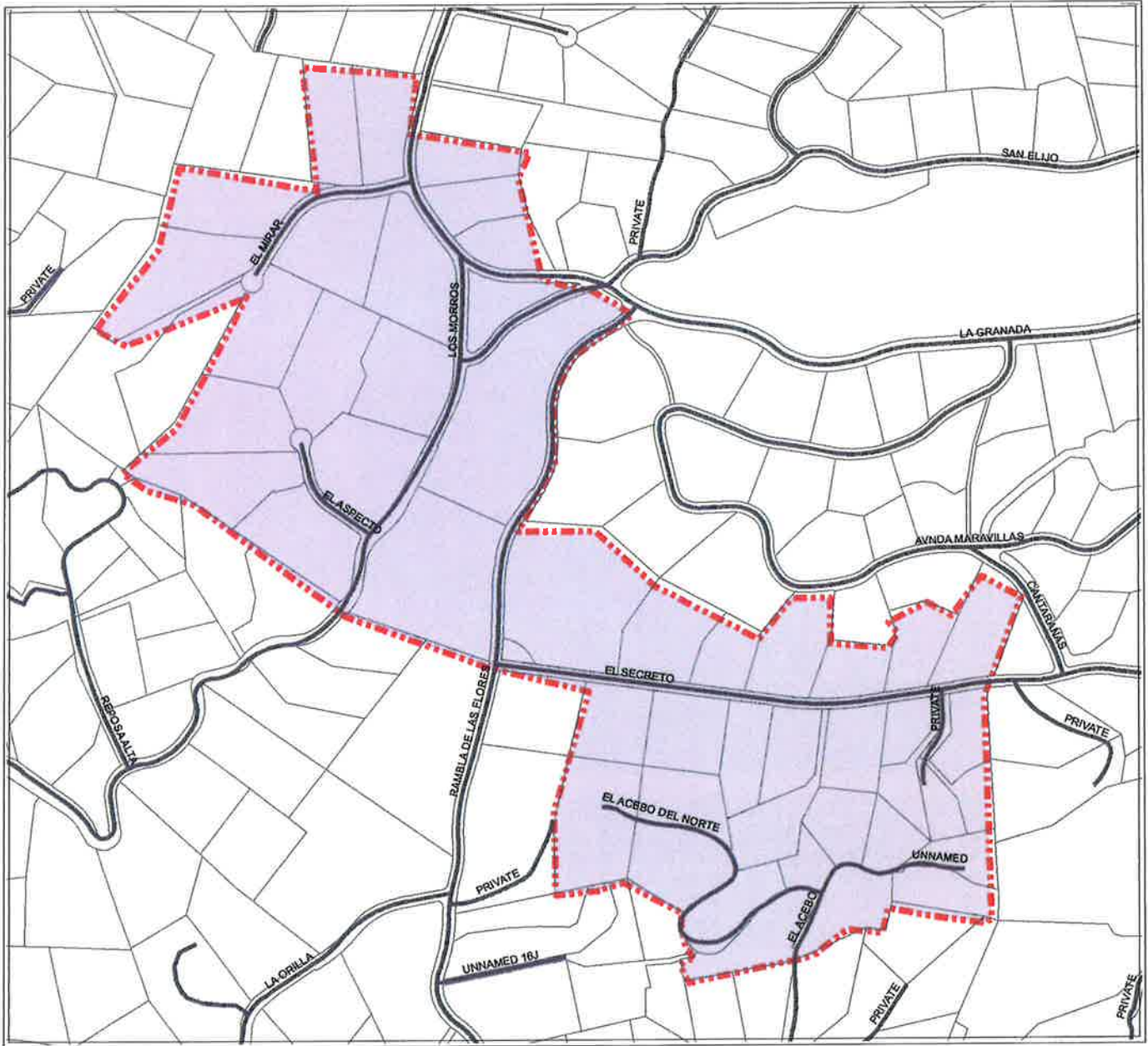
## District 17 -- Phase C, 56 Parcels

0 0.125 0.25 0.5 Miles



Map by: Liz Avalon, Associate Planner  
May 12, 2010

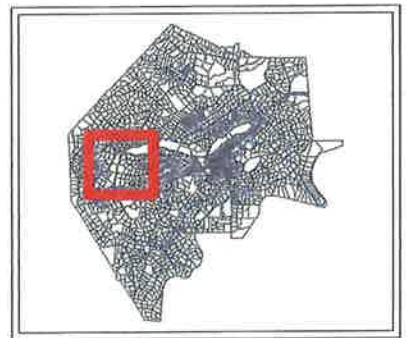
# Utility Undergrounding District Detail



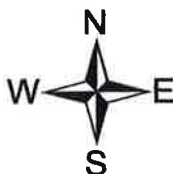
## District 18 -- Phase B, 44 Parcels

**Legend**

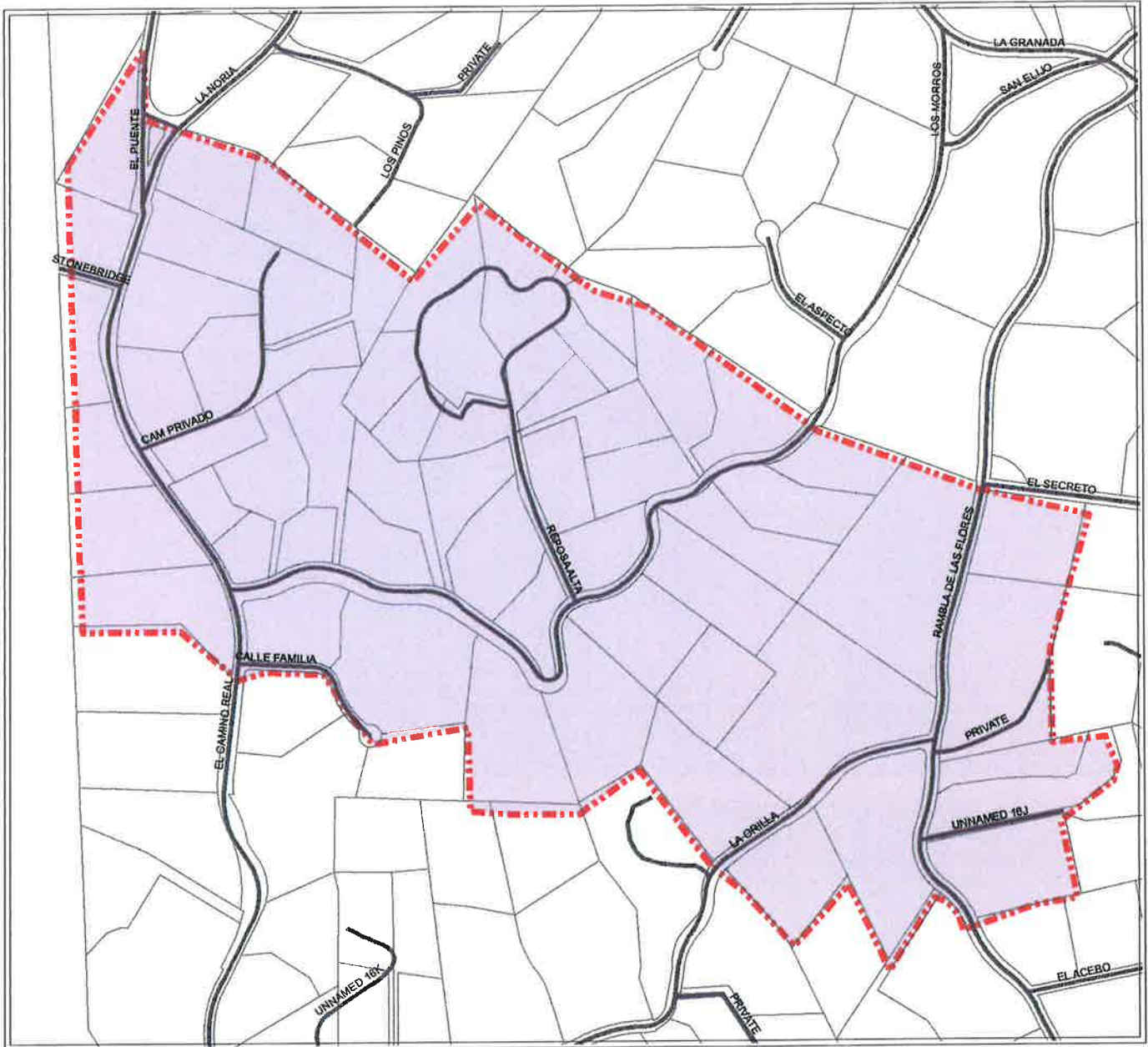
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010



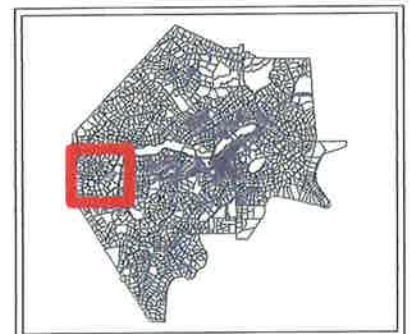
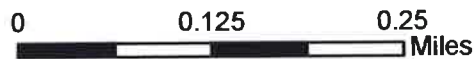
# Utility Undergrounding District Detail



## District 19 -- Phase A, 63 Parcels

**Legend**

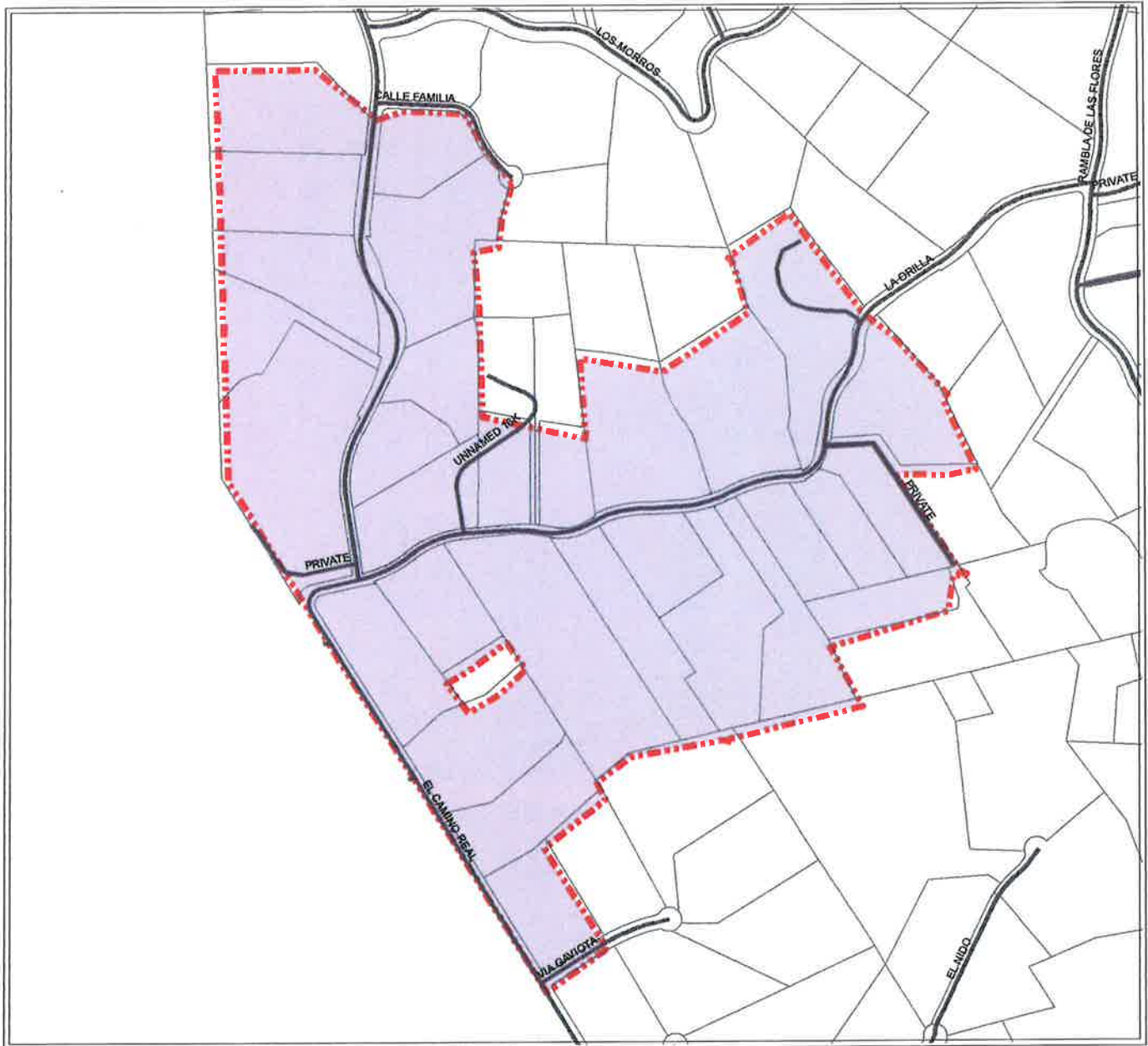
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner W  
May 12, 2010



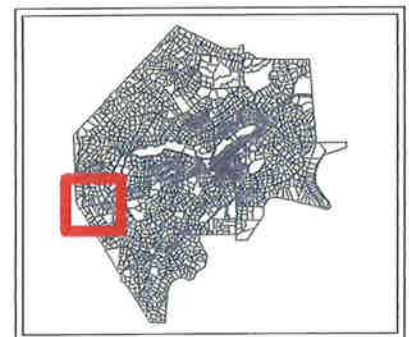
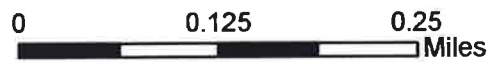
# Utility Undergrounding District Detail



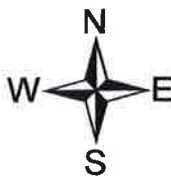
## District 20 -- Phase A, Parcels 31

**Legend**

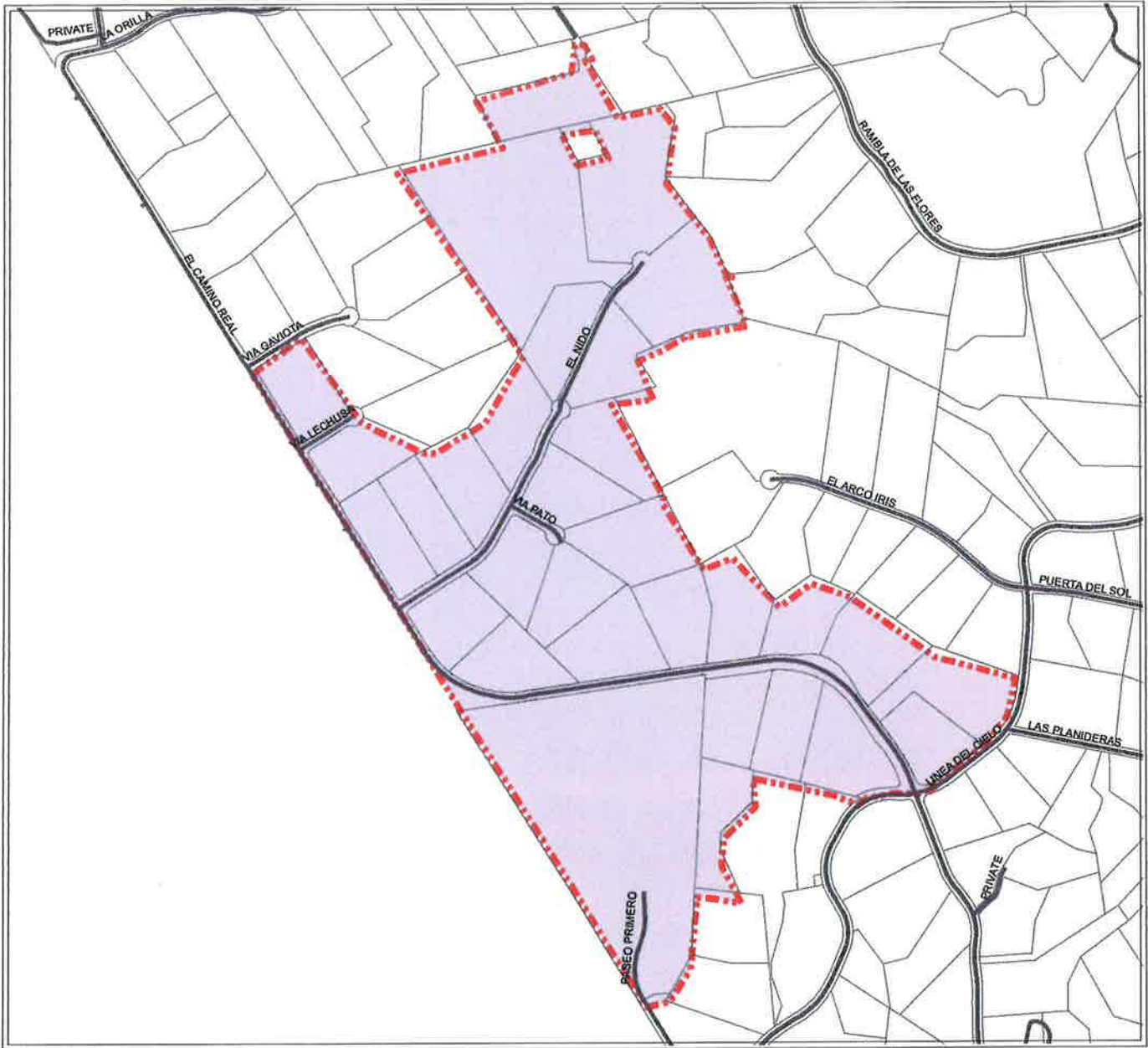
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010



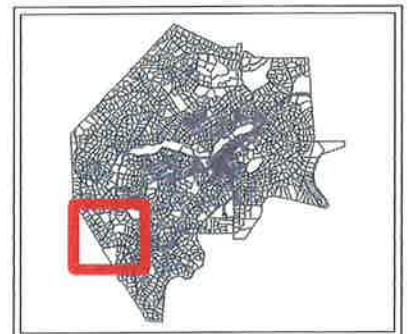
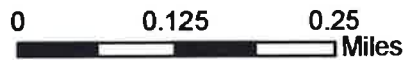
# Utility Undergrounding District Detail



## District 21 -- Phase A, Parcels 30

**Legend**

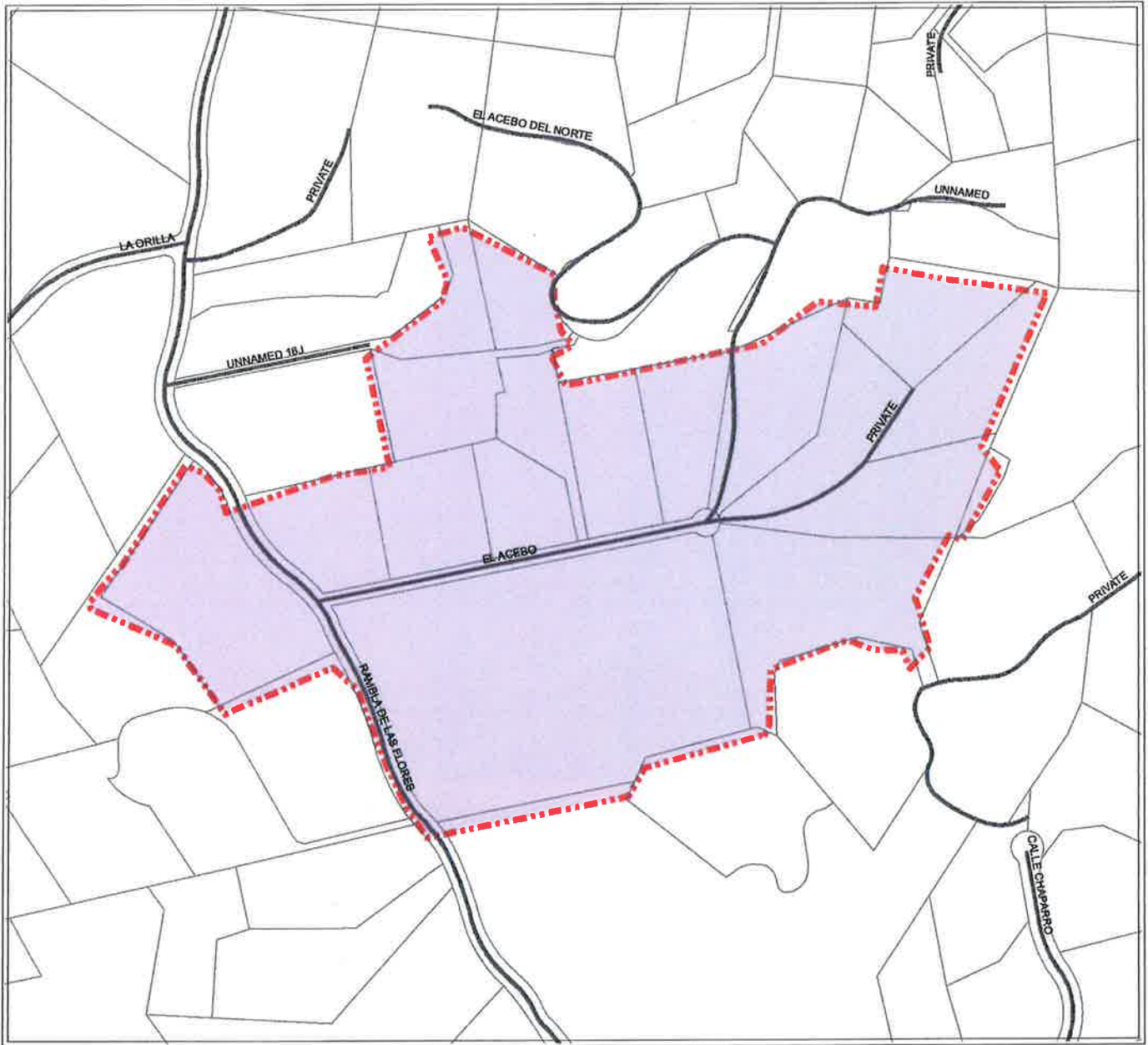
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010



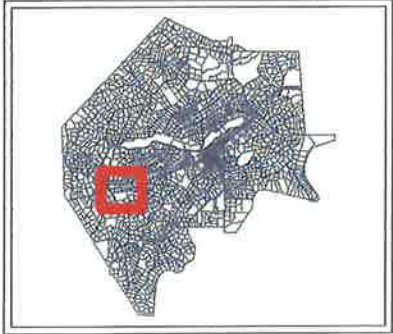
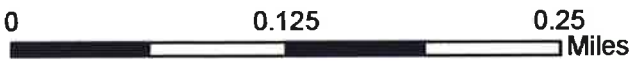
# Utility Undergrounding District Detail



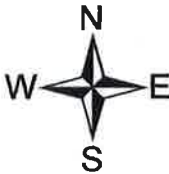
**Legend**

- Covenant Parcels
- District
- Roads

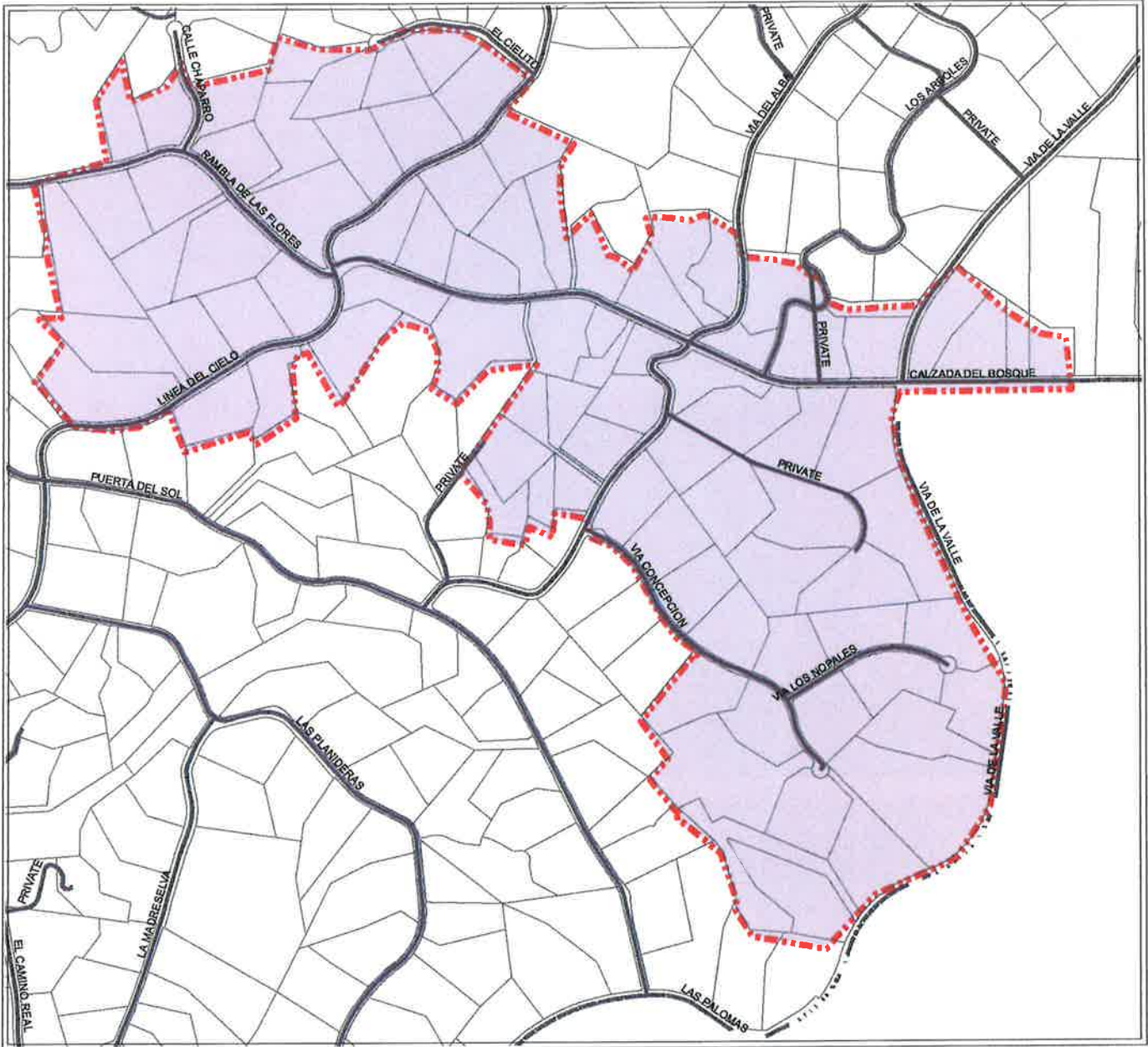
## District 22 -- Phase B, Parcels 17



Map by: Liz Avalon, Associate Planner  
May 12, 2010



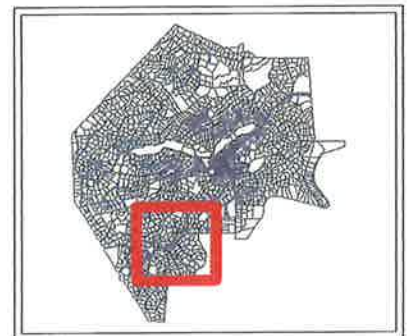
# Utility Undergrounding District Detail



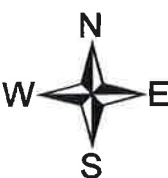
**Legend**

- Covenant Parcels
- District
- Roads

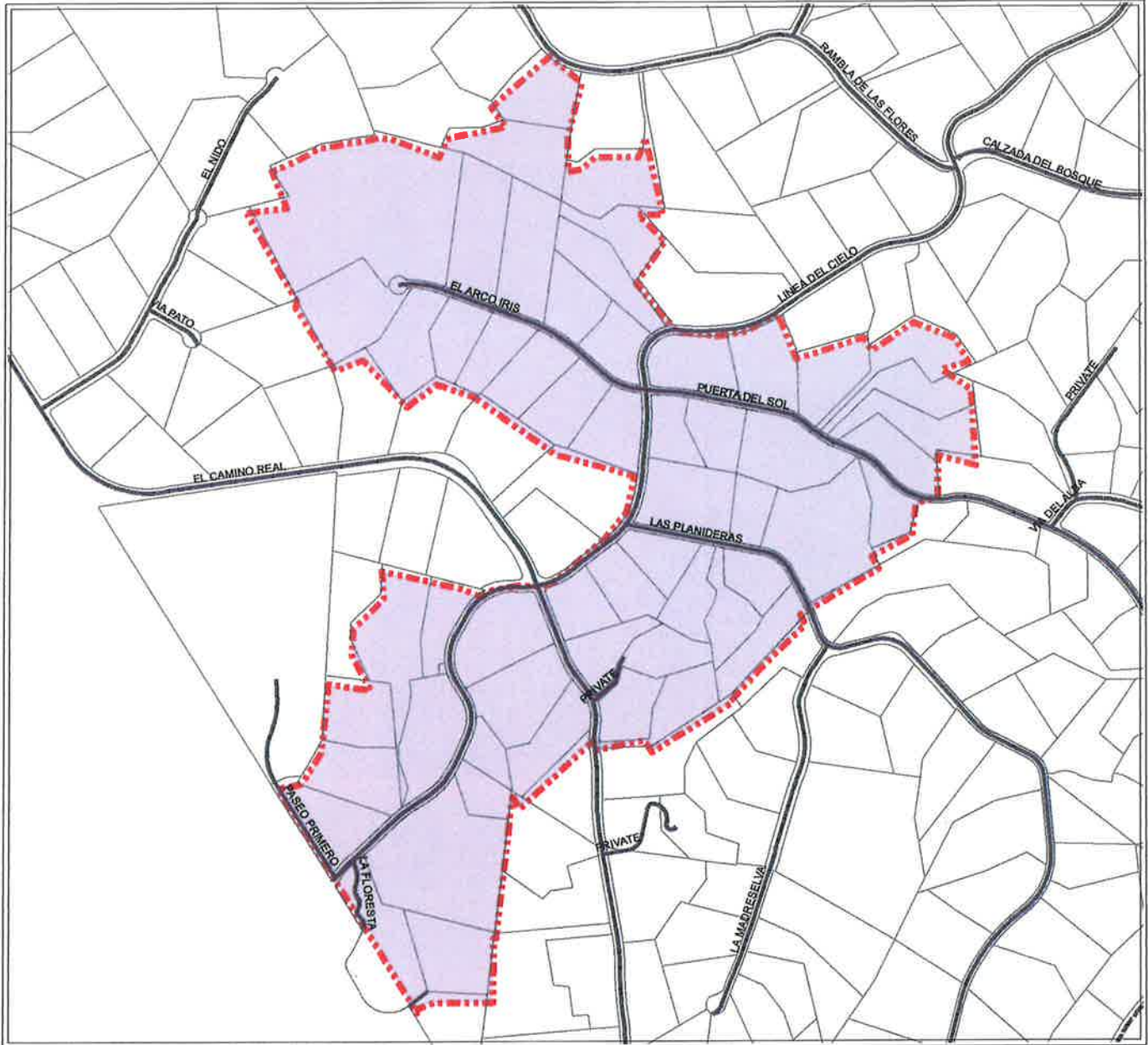
## District 23 -- Phase C, Parcels 89



Map by: Liz Avalon, Associate Planner  
May 12, 2010



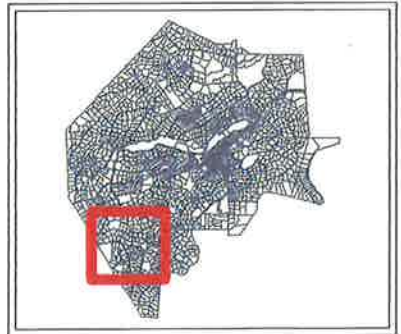
# Utility Undergrounding District Detail



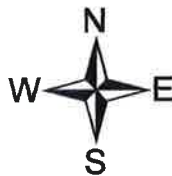
**Legend**

- Covenant Parcels
- District
- Roads

## District 24 -- Phase B, Parcels 56

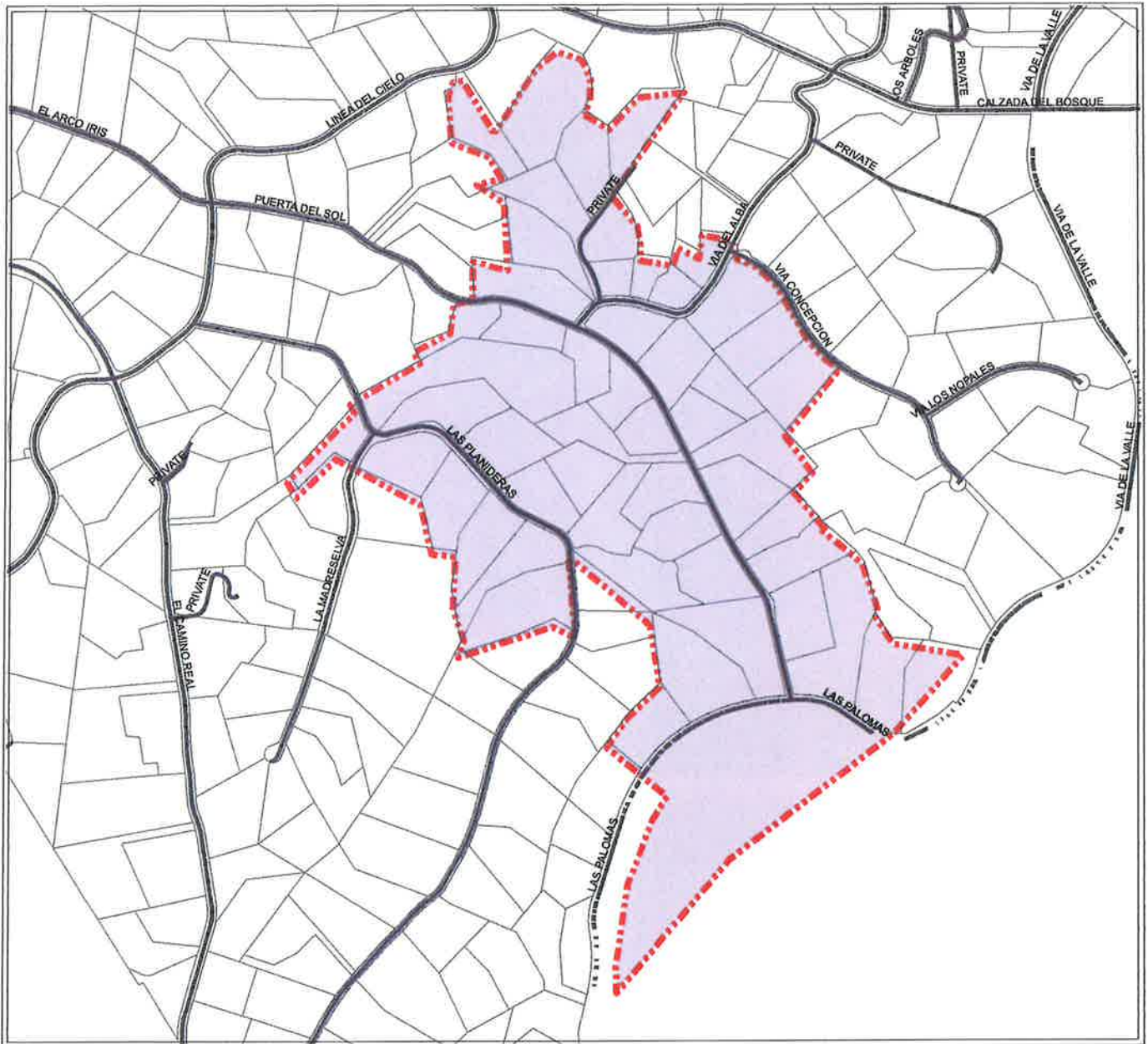


Map by: Liz Avalon, Associate Planner  
May 12, 2010





# Utility Undergrounding District Detail



## Legend

-  Covenant Parcels
-  District
-  Roads

## District 25 -- Phase B, Parcels 53

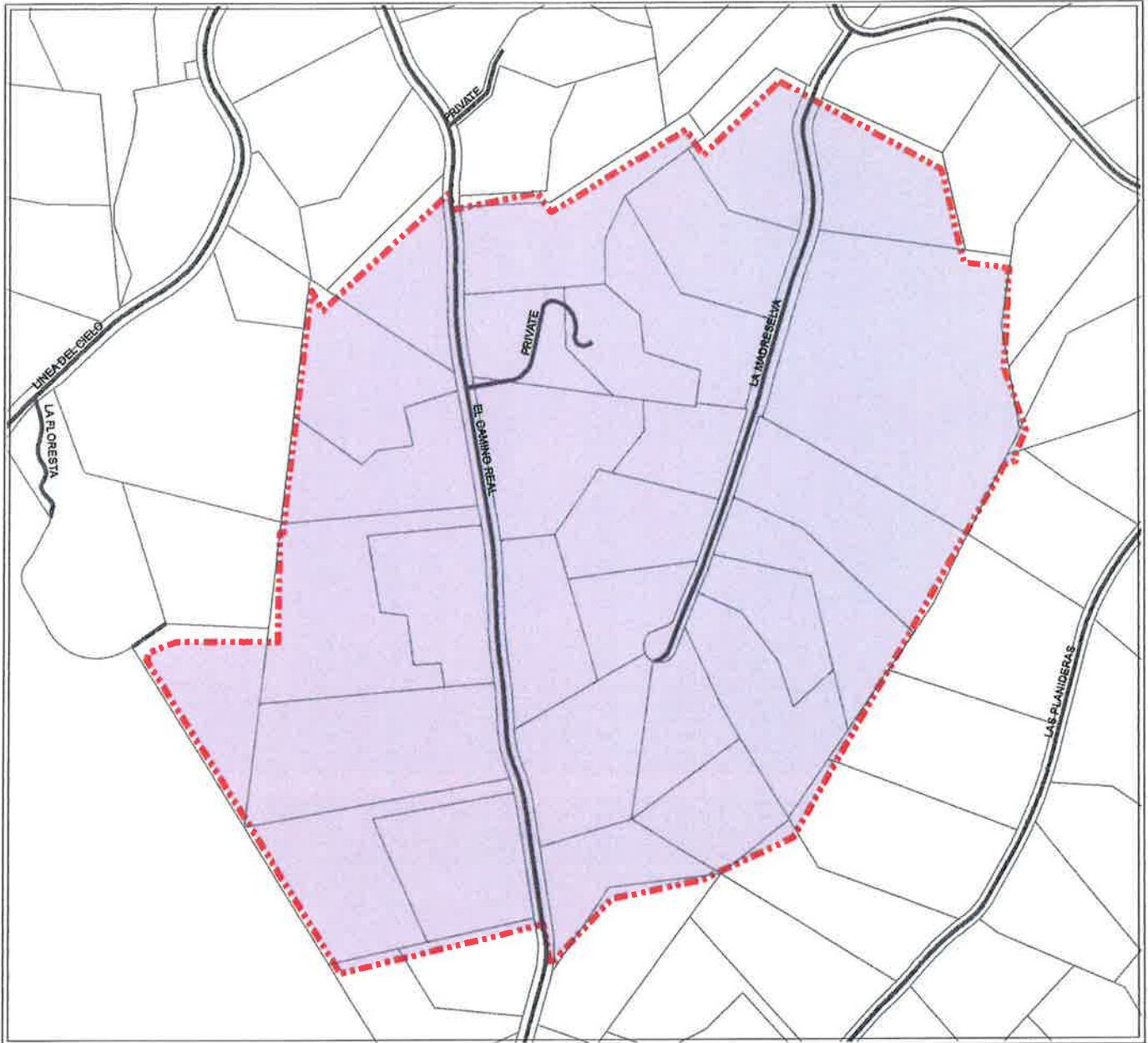
0 0.125 0.25 Miles






Map by: Liz Avalon, Associate Planner  
May 12, 2010



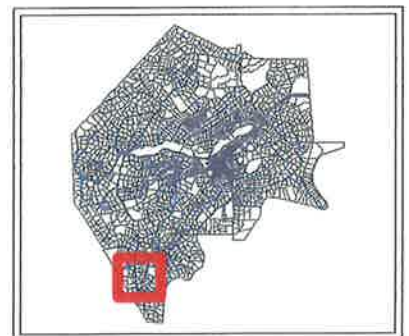
# Utility Undergrounding District Detail



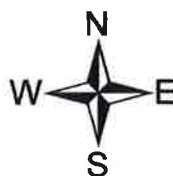
**Legend**

-  Covenant Parcels
-  District
-  Roads

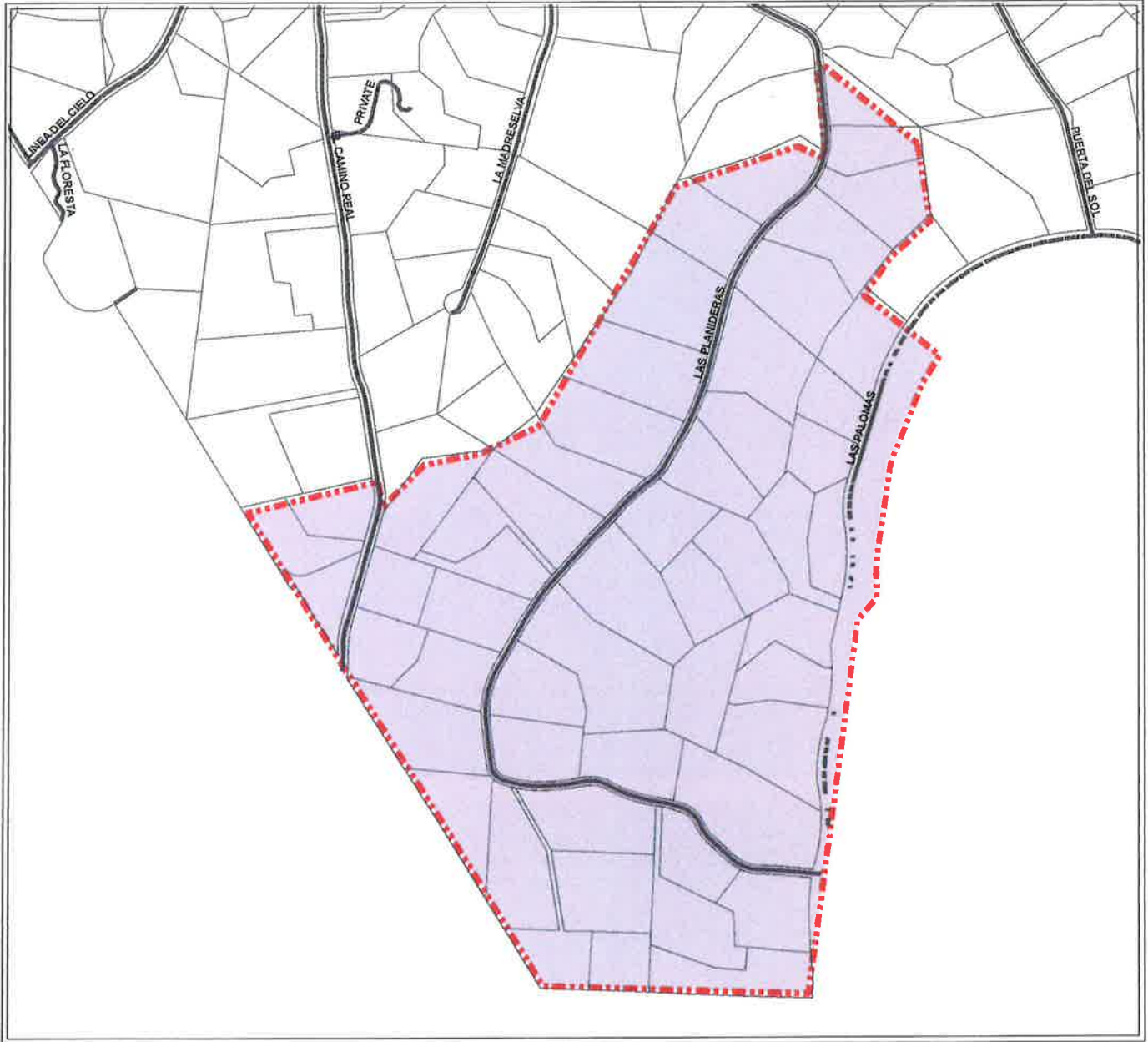
## District 26 -- Phase A, Parcels 31






Map by: Liz Avalon, Associate Planner  
May 12, 2010



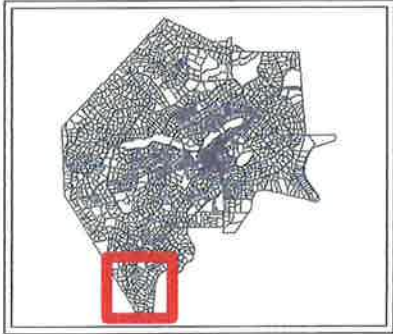
# Utility Undergrounding District Detail



**Legend**

-  Covenant Parcels
-  District
-  Roads

## District 27 -- Phase A, Parcels 54



Map by: Liz Avalon, Associate Planner W  
May 12, 2010



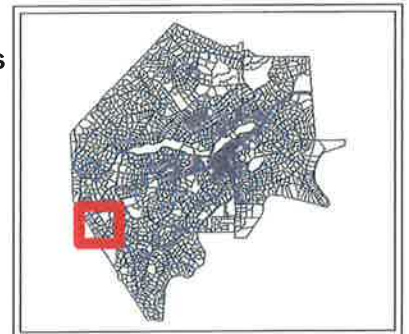
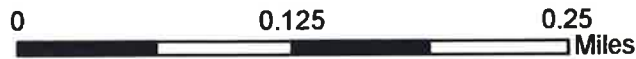
# Utility Undergrounding District Detail



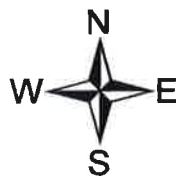
**Legend**

- Covenant Parcels
- District
- Roads

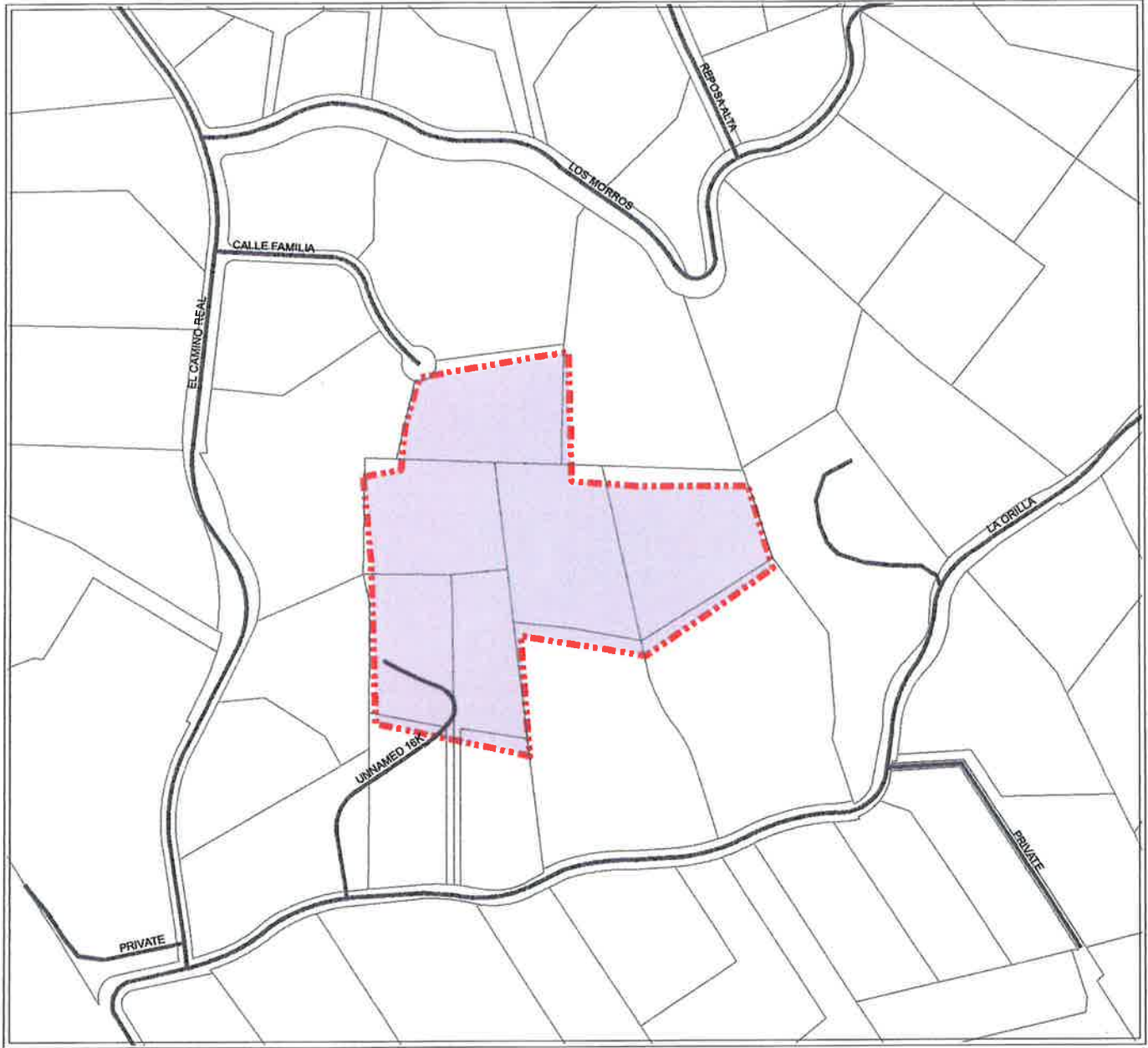
## District 28 -- Phase A, Parcels 6



Map by: Liz Avalon, Associate Planner  
May 12, 2010



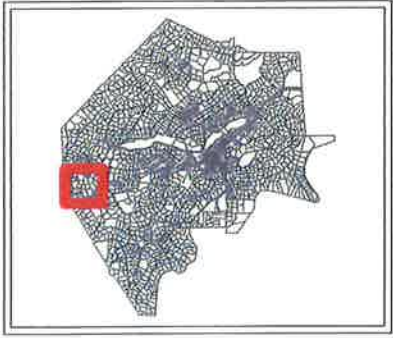
# Utility Undergrounding District Detail



## District 29 -- Phase A, Parcels 6

**Legend**

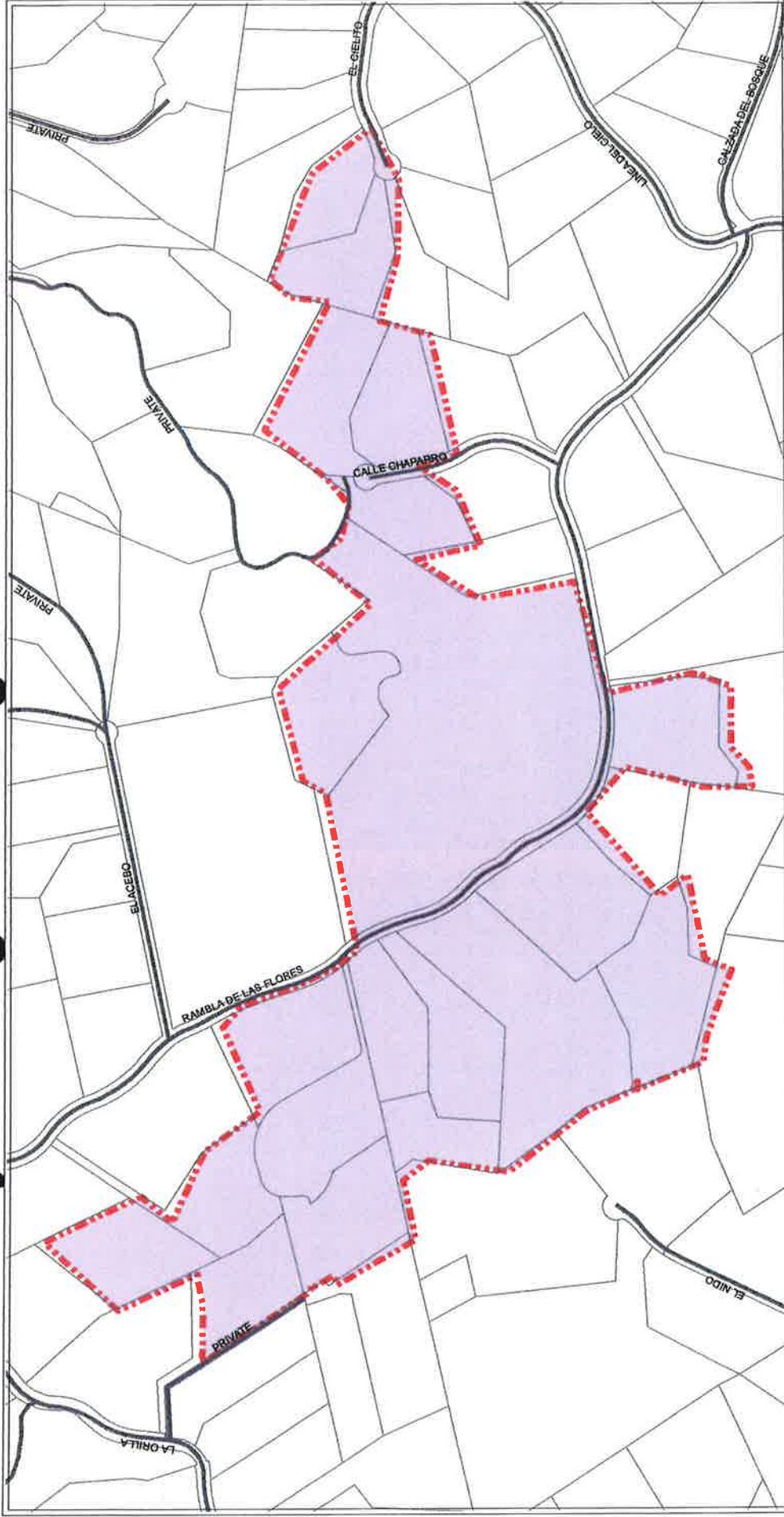
-  Covenant Parcels
-  District
-  Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010



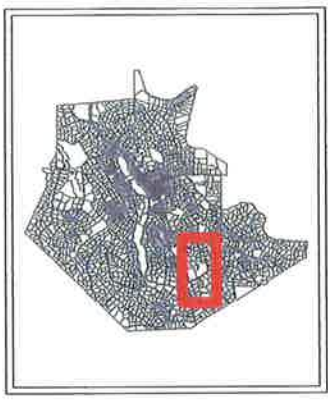
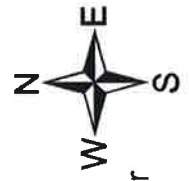
# Utility Undergrounding District Detail



## District 30 -- Phase B, 20 Parcels

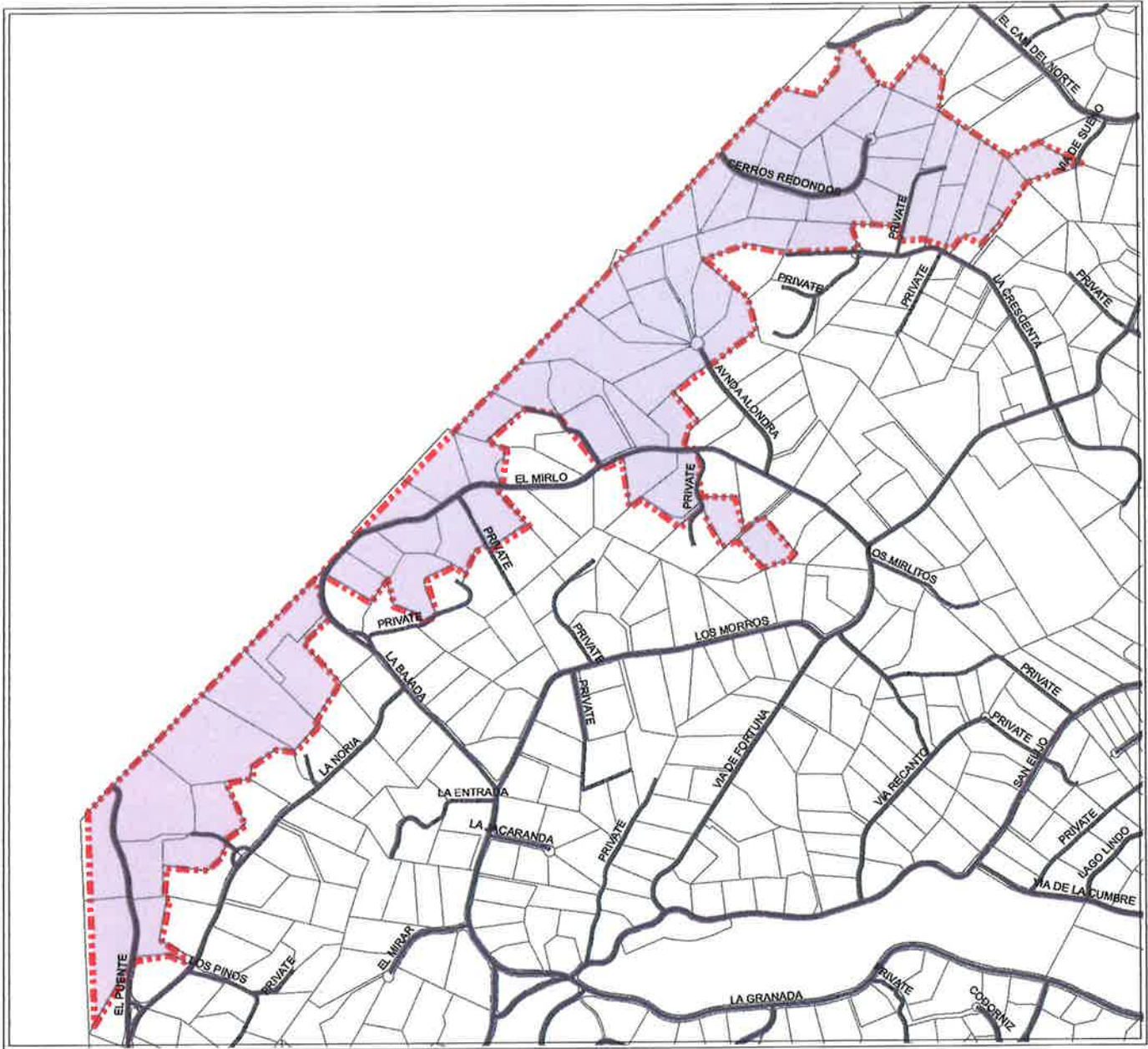
**Legend**

- Covenant Parcels
- District
- Roads






Map by: Liz Avalon, Associate Planner  
May 12, 2010

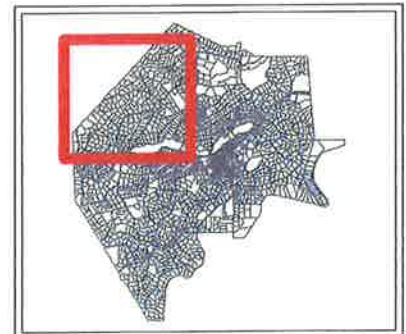
# Utility Undergrounding District Detail



## District 31 -- Phase B, Parcels 65

**Legend**

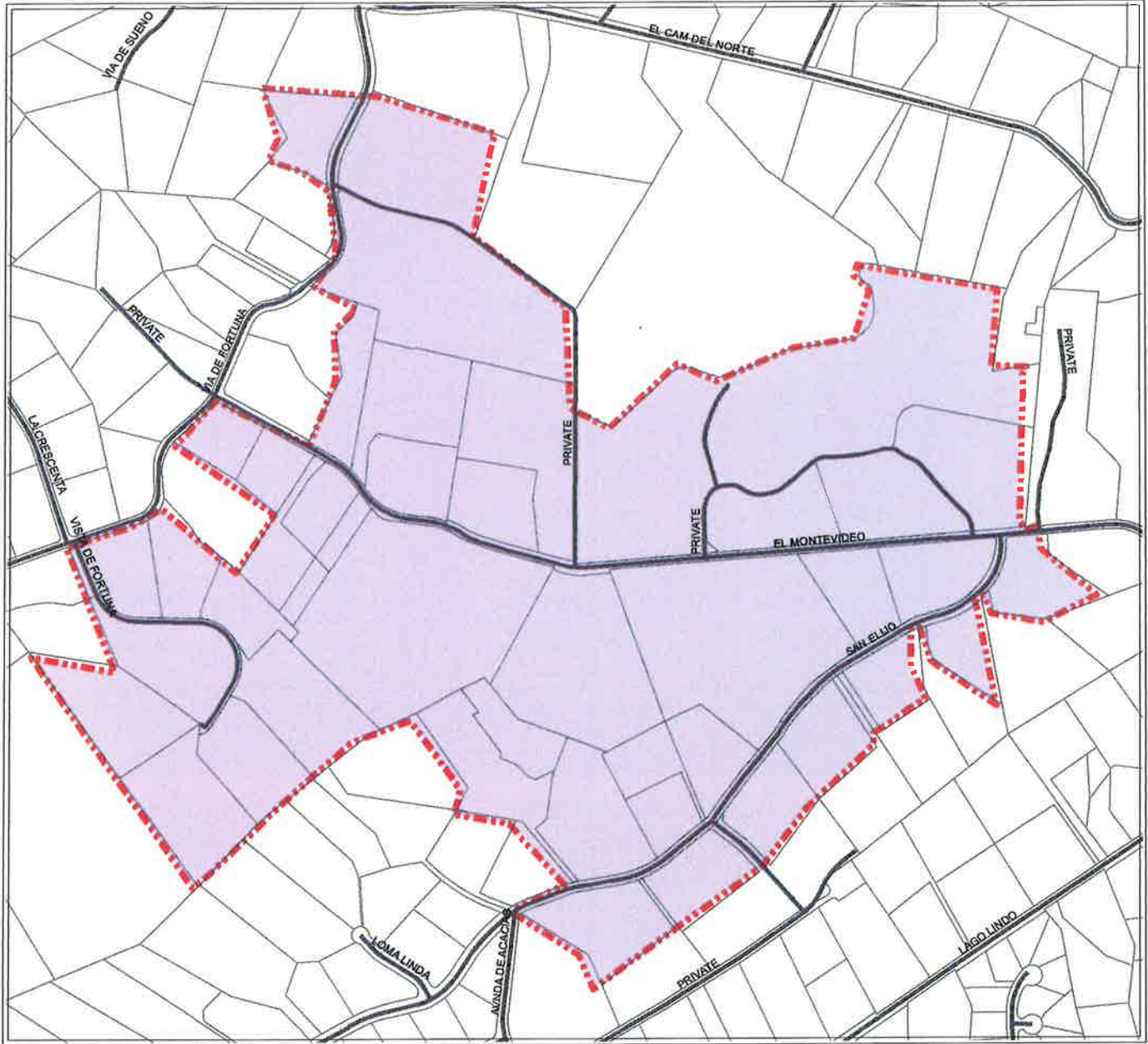
-  Covenant Parcels
-  District
-  Roads



Map by: Liz Avalon, Associate Planner  
 May 12, 2010



# Utility Undergrounding District Detail



## Legend

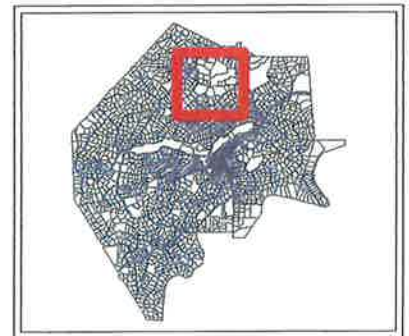
-  Covenant Parcels
-  District
-  Roads

0 0.125 0.25 Miles

## District 32 -- Phase B, Parcels 45

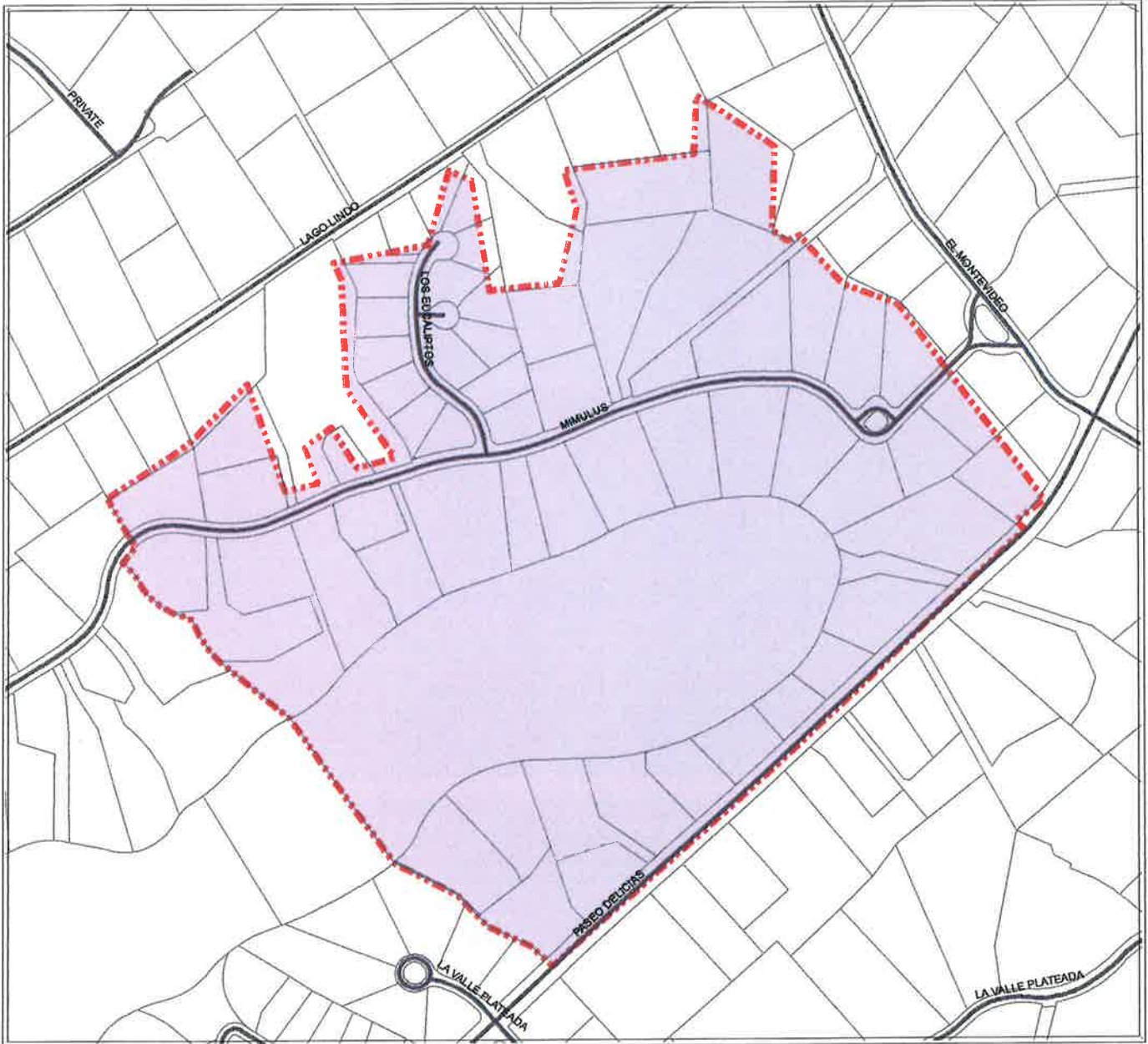


Map by: Liz Avalon, Associate Planner  
May 12, 2010





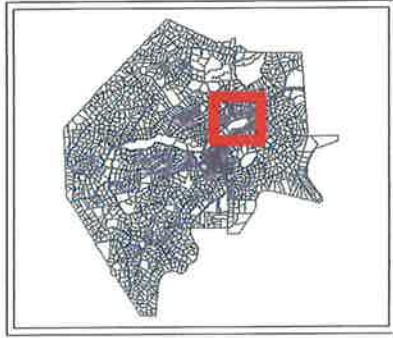
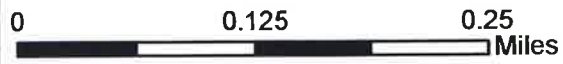
# Utility Undergrounding District Detail



## District 33 -- Phase B, Parcels 61

**Legend**

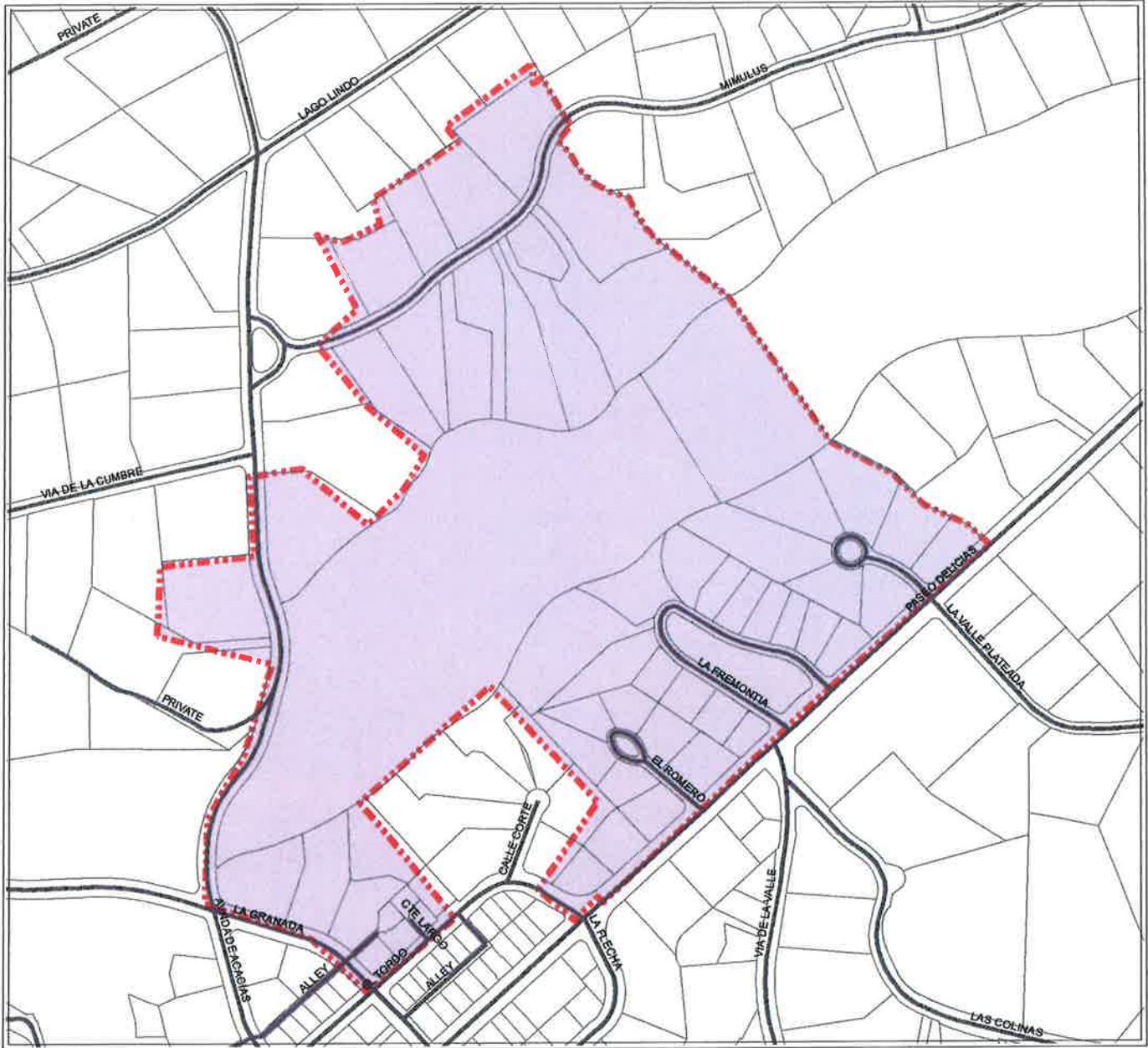
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010



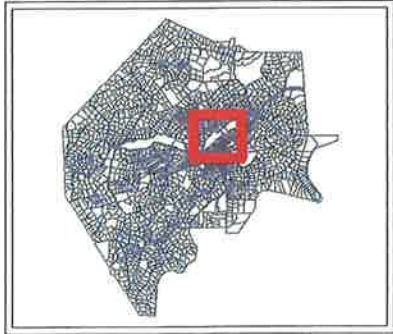
# Utility Undergrounding District Detail



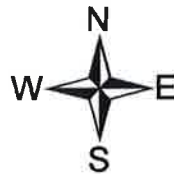
**Legend**

- Covenant Parcels
- District
- Roads

## District 34 -- Phase B, Parcels 56



Map by: Liz Avalon, Associate Planner  
May 12, 2010



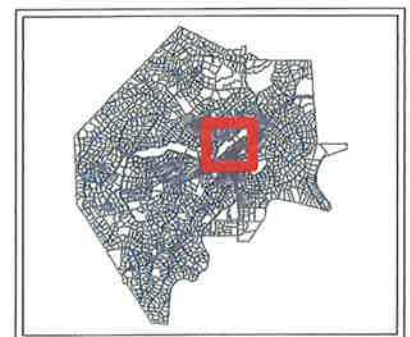
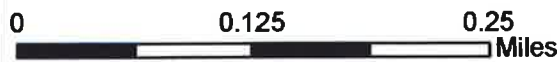
# Utility Undergrounding District Detail



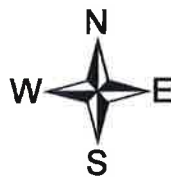
## District 35 -- Phase C, Parcels 28

**Legend**

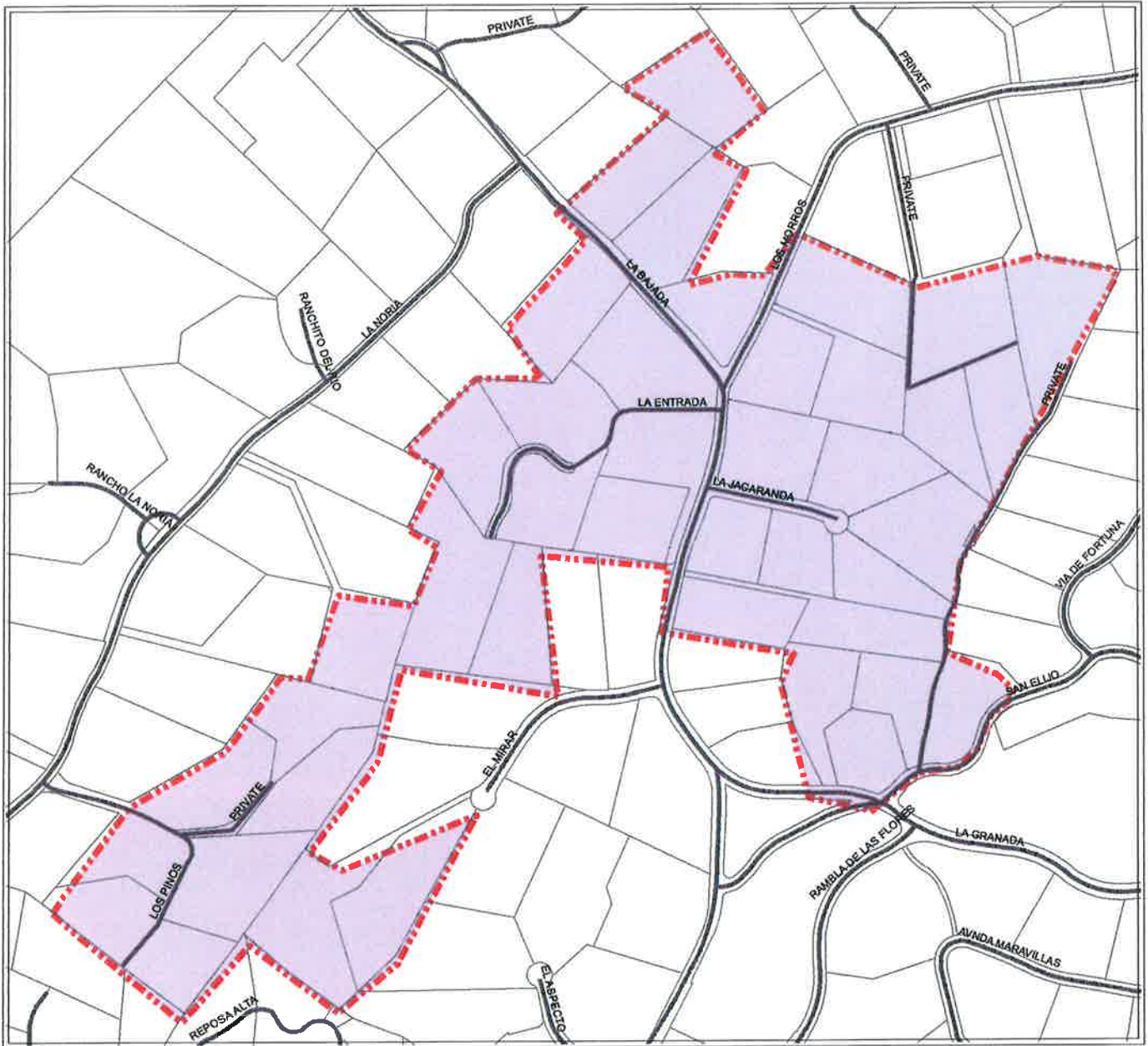
- Covenant Parcels
- District
- Roads



Map by: Liz Avalon, Associate Planner  
May 12, 2010






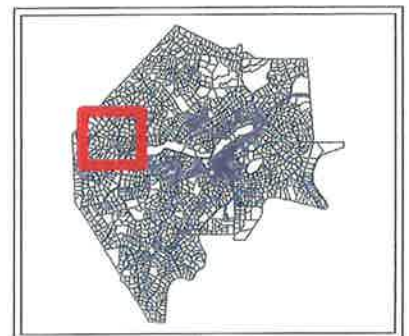
# Utility Undergrounding District Detail



## District 36 -- Phase C, Parcels 42

**Legend**

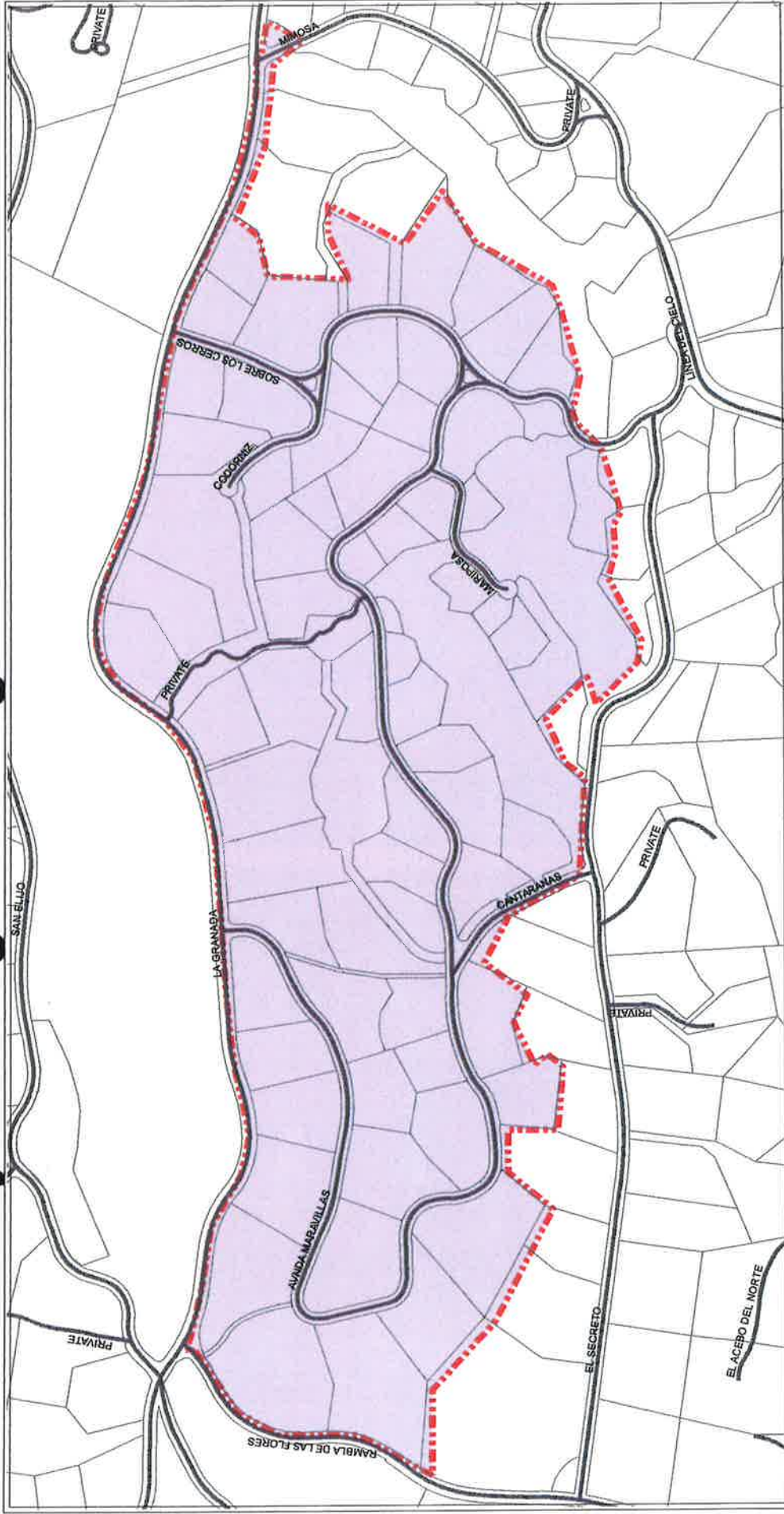
-  Covenant Parcels
-  District
-  Roads



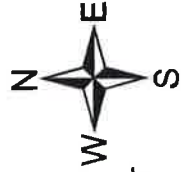
Map by: Liz Avalon, Associate Planner W  
 May 12, 2010



# Utility Undergrounding District Detail




## District 37 -- Phase C, 49 Parcels

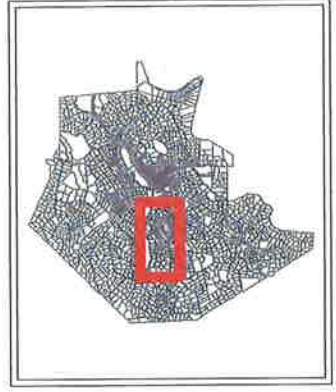


Map by: Liz Avalon, Associate Planner  
May 12, 2010

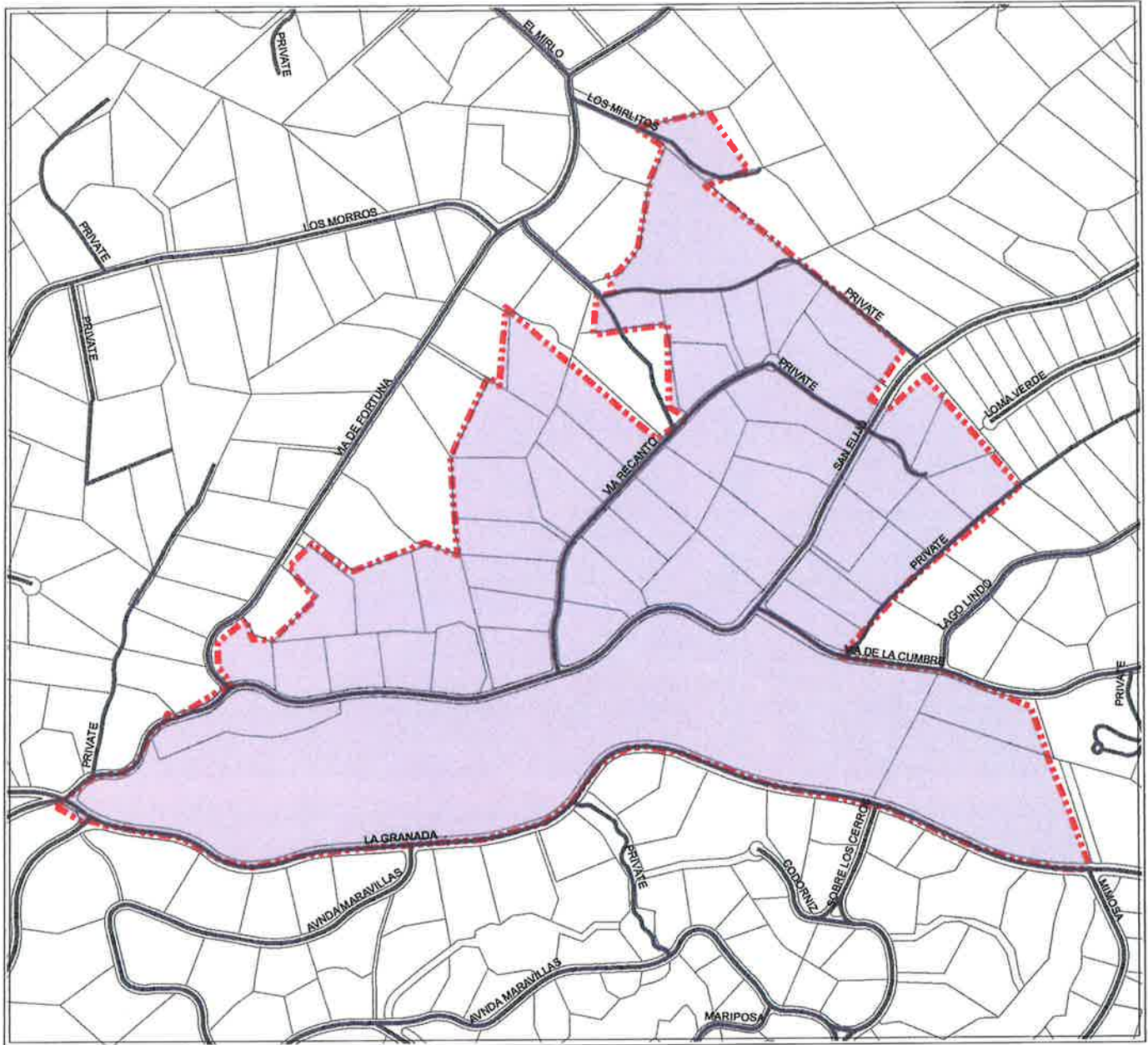


### Legend




-  Covenant Parcels
-  District
-  Roads



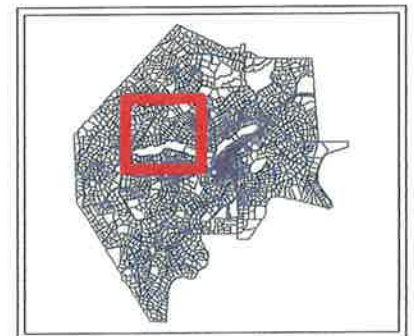
# Utility Undergrounding District Detail



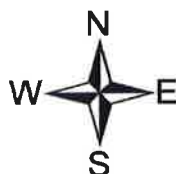
**Legend**

-  Covenant Parcels
-  District
-  Roads

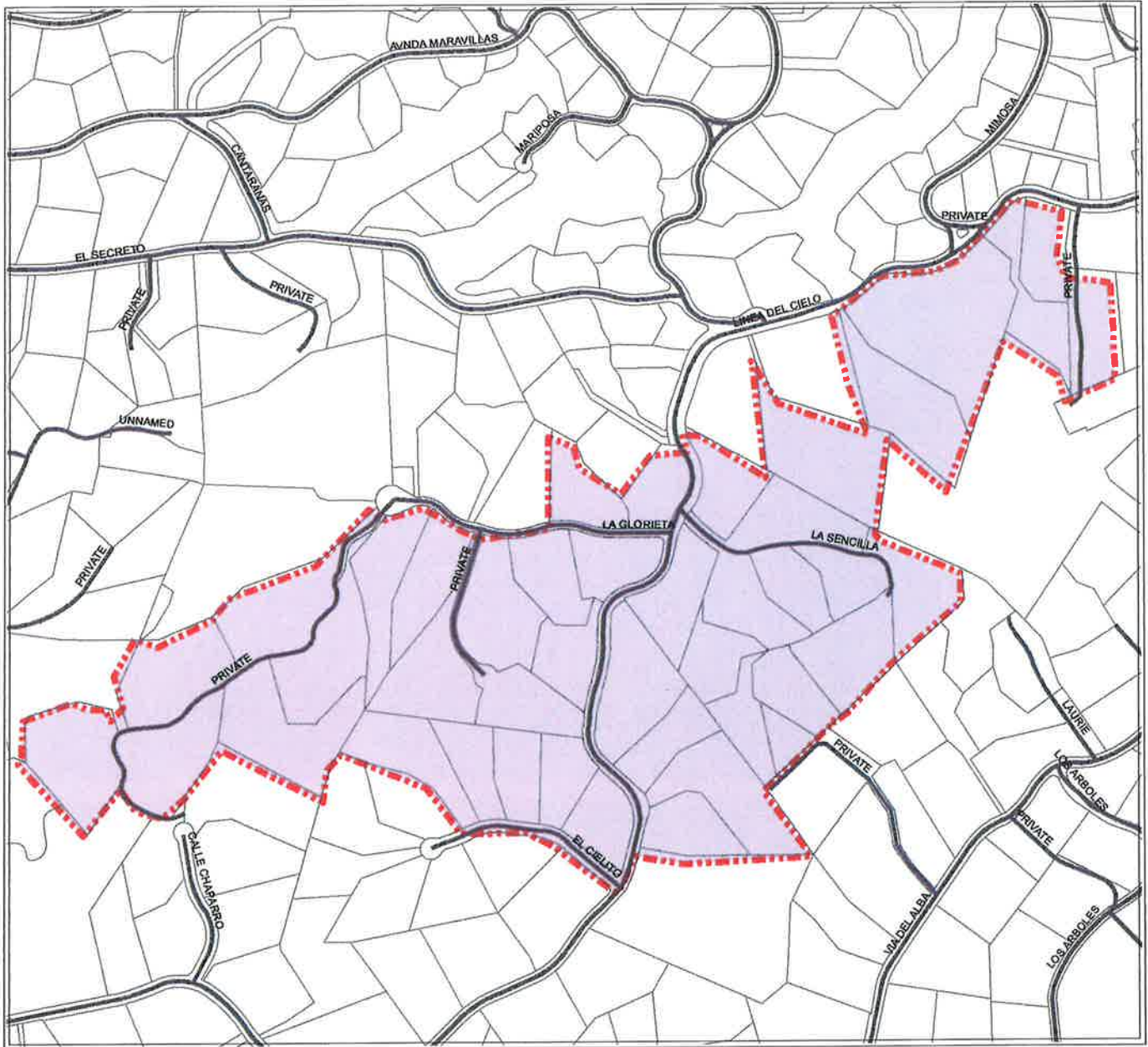
## District 38 -- Phase C, Parcels 50



Map by: Liz Avalon, Associate Planner  
May 12, 2010



# Utility Undergrounding District Detail



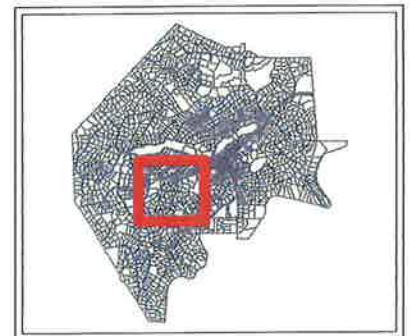
## Legend

-  Covenant Parcels
-  District
-  Roads

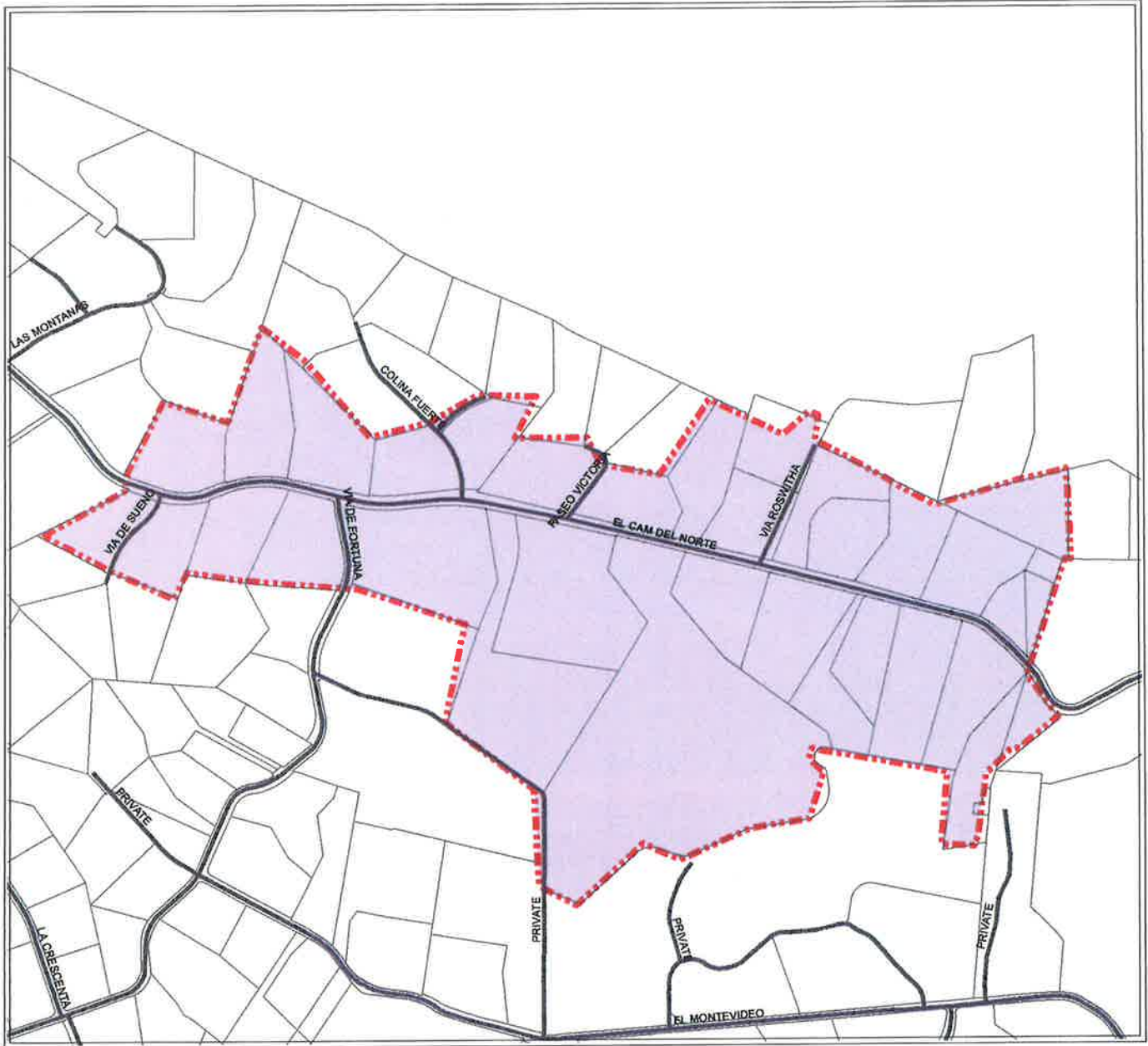
## District 39 -- Phase C, Parcels 43



Map by: Liz Avalon, Associate Planner W  
May 12, 2010



# Utility Undergrounding District Detail

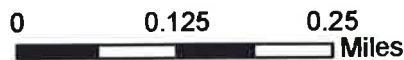


## Legend

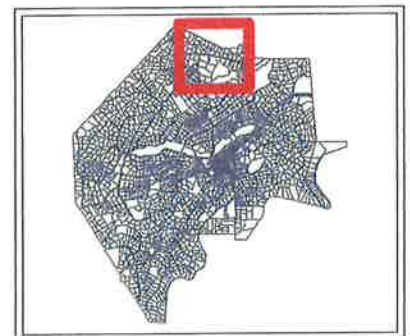
-  Covenant Parcels
-  District
-  Roads

## District 20A (North) -- Phase A/B, Parcels 34

At the time the Districting Study was completed, this area was considered eligible for a County 20A Subsidized undergrounding project. The County has since revised its policy and this area is now unlikely to receive any 20A funding.



Map by: Liz Avalon, Associate Planner  
May 12, 2010





# Utility Undergrounding District Detail



## Legend

-  Covenant Parcels
-  District
-  Roads

## District 20A (Village) -- Phase A/B, Parcels 7

At the time the Districting Study was completed, this area was considered eligible for a County 20A Subsidized undergrounding project. The western section was completed in 2008. The County has since revised its policy and the remainder of this area is now unlikely to receive any 20A funding.



Map by: Liz Avalon, Associate Planner  
May 12, 2010

