



Benefit Assessment District

Overview, Results, Next Steps

Three Rivers Levee Improvement Authority (TRLIA)

June 2, 2009



Benefit Assessment Purpose

- ❖ Assessment revenues will fund levee maintenance that will be performed exclusively by RD784
- ❖ If growth occurs in district, revenues in excess of what is needed for maintenance could be used to repay obligation for local share of flood control improvements

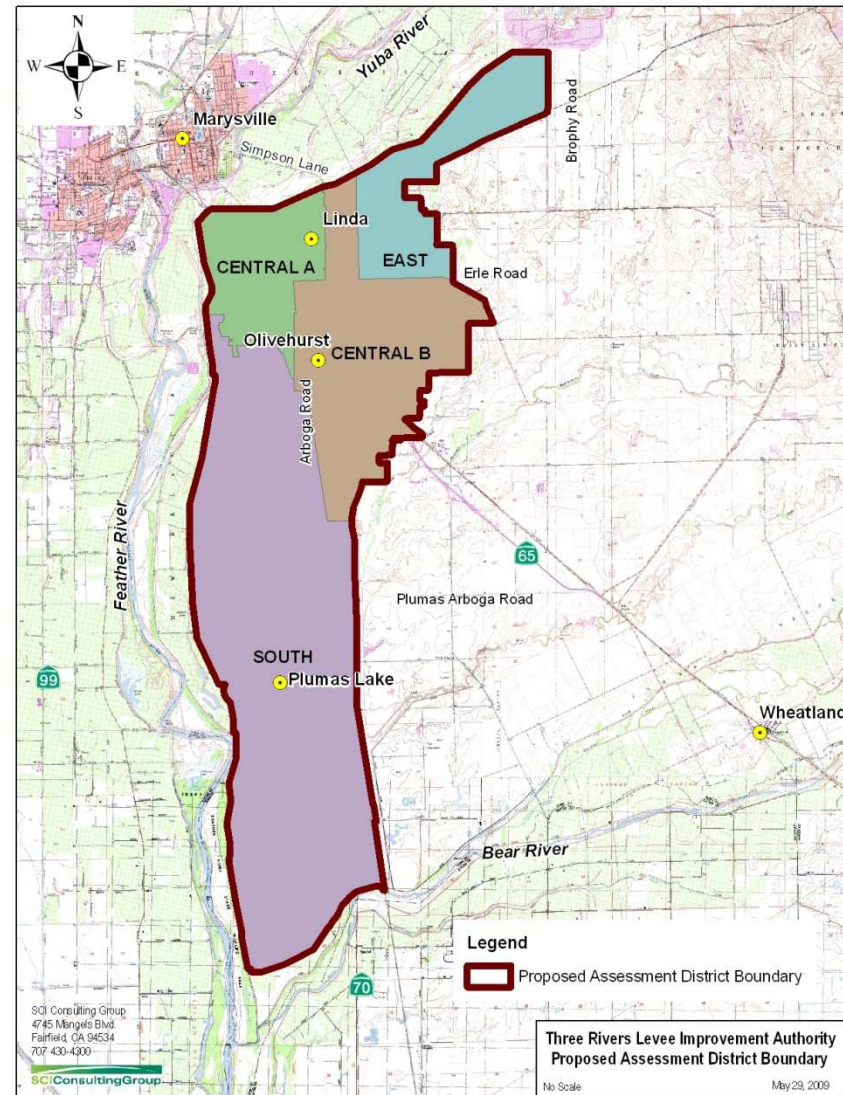


Assessment District Formation

- ❖ Annual assessment based on benefit to the property to perform O & M.
- ❖ Benefit calculation and assessment methodology described in the Engineer's Report
- ❖ Balloting procedure governed by Proposition 218
- ❖ Voted on by property owners, with votes weighted by proposed assessment amount
- ❖ Assessment may be adopted if weighted votes cast in favor exceed those in opposition

District Boundaries & Zones

- ❖ Boundaries encompass all areas that benefit from 29 miles of improved levees, including areas outside RD 784 boundaries
- ❖ Properties grouped in four zones based upon similar benefit





Process Timeline

- ❖ February 17, 2009 – Board workshop
- ❖ February to date – Public outreach: stakeholder meetings (10), Web site and printed materials, responses to questions and comments (200+ formally answered in writing), respond to TRLIA hotline calls (75+)
- ❖ March 3 – Board Meeting to consider Benefit Assessment balloting
- ❖ March 10 – Board initiates Benefit Assessment balloting process
- ❖ March 26 – Ballots mailed to approximately 10,000 property owners
- ❖ May 12 – Public Hearing & Close of Balloting
- ❖ May 19-20 – Ballots counted by independent, third-party
- ❖ May 21 – Ballot tabulation results announced
- ❖ June 2 – Official Results & Board Decision on Levying Assessment



Results

- Total # of ballots mailed to property owners: 9,842
- Total # of ballots received by May 12, 2009: 2,459
- Return rate: 24.98%

- Total # of Valid Ballots: 2,434
- Total assessment amount of Valid ballots: \$275,441.59

- Total # of Invalid Ballots: 25
- Total assessment of Invalid Ballots: \$1,954.58

- Total # of "Yes" votes: 1,364
- Total assessment amount of "Yes" votes: \$171,440.15
- Percentage of "Yes" amount: 62.24

- Total # of "No" votes: 1,070
- Total assessment amount of "No" votes: \$104,001.44
- Percentage of "No" amount: 37.76



Finalizing the Benefit Assessment District

❖ Engineer's Report

- Signed May 28, 2009

❖ Assessment Diagram

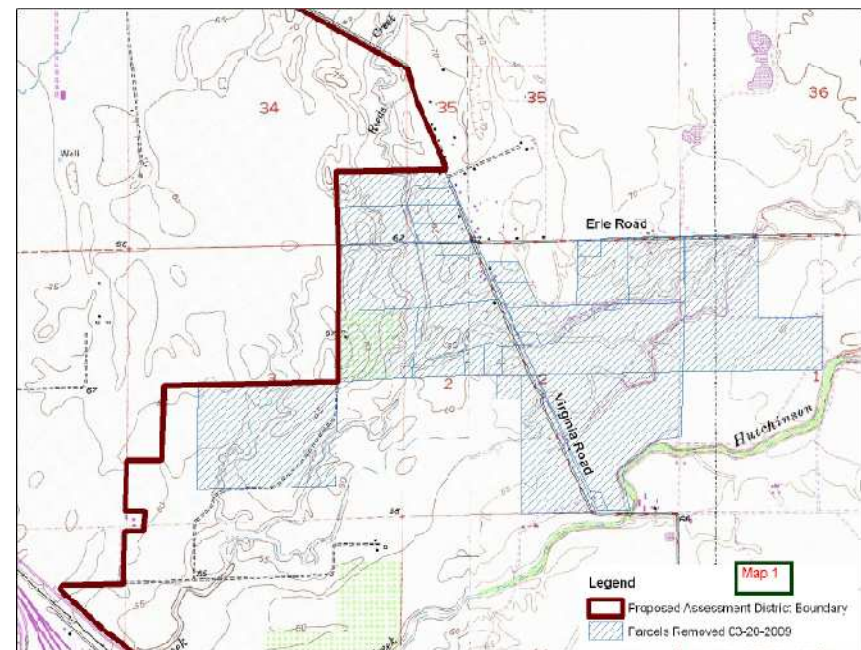
- Two minor boundary adjustments

❖ Assessment Roll

- Roll prepared
- Will be reviewed against final budget prior to submittal

Boundary Change No. 1

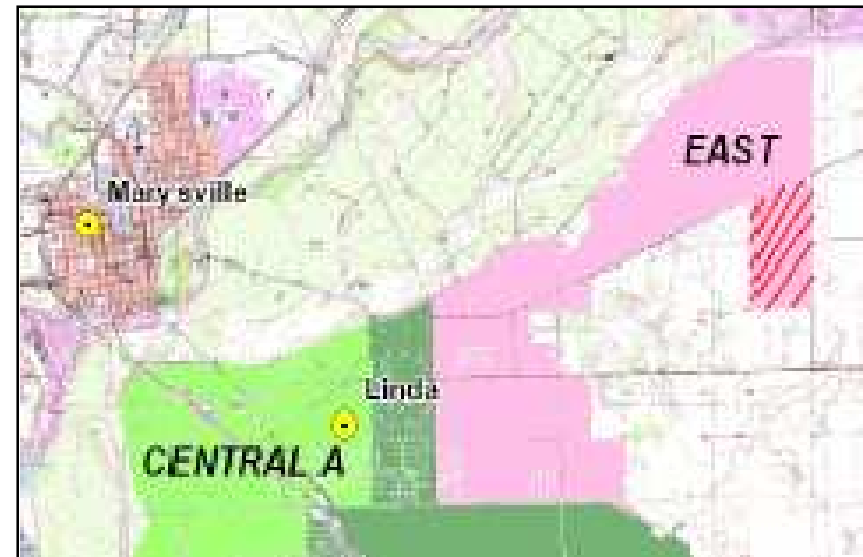
- 27 parcels removed
- Review indicated that flooding from local creeks more than offset flood control benefit received from levees
- Removed prior to mailing of ballots





Boundary Change No. 2

- 8 parcels removed
- Review indicated that these parcels were not subject to flooding
- Removed after mailing of ballots





Next Steps

- Board adopts resolution to form Benefit Assessment District – Recommendation is today
- RD 784 finalizes budget with specific expenses based on the approved engineers report; and TRLIA performs budget review – Next 30 to 45 days
- RD 784/TRLIA finalize levee maintenance agreement – Next 30 days
- Board finalizes process for annual budget review and annual updates to Engineer’s Report– Next 30 to 45 days
- Assessment roll verified once budget with specific expenses is approved and then submitted to Auditor Controller for inclusion on 09/10 property tax bills by August 10, 2009
- Assessments appear on property tax bills beginning fall 2009