

UPDATE ON THE LANDSCAPE MAINTENANCE DISTRICTS (LMDS)

Presented to:
Sandra Burkhart
August 1, 2018

WHAT IS AN ASSESSMENT DISTRICT?

- Assessment Districts are financing mechanisms commonly used by public agencies throughout California to fund improvements, maintenance and services
- Various types: Maintenance Assessment Districts, Landscape Maintenance Districts, Community Facilities Districts
- Since the City's Districts were formed, the political and legal environment has changed
- Currently there are 36 Landscape Maintenance Districts, 1 Maintenance Assessment District and a Waterways Assessment District, all different types of financing districts formed under the laws at that time

WHAT IS AN ASSESSMENT DISTRICT?

2017-18 VENTURA COUNTY SECURED TAX STATEMENT

STEVEN HINTZ, TREASURER-TAX COLLECTOR
800 South Victoria Avenue, Ventura, CA 93009-1290

(805) 654-3744

Pay On-Line at: www.venturapropertytax.org

OWNER OF RECORD JANUARY 1, 2017

Not available online pursuant to CA GC6254.21

SITUS/LOCATION

CURRENT OWNER

Not available online pursuant to CA GC6254.21

PHONE	SERVICE AGENCY	RATE PER \$100	AMOUNT
805 654 3181	PROP 13 MAXIMUM 1% TAX	1.000000	5,183.00
805 383 1981	EL SCH BD OXNARD	0.000600	3.10
805 383 1981	EL SCH BD OXNARD #2	0.026800	138.91
805 383 1981	EL SCH BD OXNARD #3	0.028700	148.75
805 383 1981	EL SCH BD OXNARD #4	0.027600	143.05
805 383 1981	HI SCH BOND OXNARD	0.008800	45.61
805 383 1981	HI SCH BOND OXNARD #2	0.019900	103.14
805 383 1981	VTA COMM COLLEGE BD	0.015100	78.27
866 807 6864	METROPOLITAN WTR	0.003500	18.14
805 385 7480	CITY OXNARD DIST #1	0.068774	356.45
	GENERAL TAX TOTAL	1.199774	6,218.42

PHONE	SPECIAL ASSESSMENT	DIST./ZONE	AMOUNT
805 650 4073	ZN 2 OXNARD WPD NPDES	14-26	3.36
805 579 7129	CALLEGUAS MWD	08-24	5.00
805 654 2816	VECTOR CONTROL	03-01	5.22
805 650 4073	ZN 2 OXNARD NPDES	14-42	8.74
866 807 6864	METROPOLITAN WATER	08-22	9.58
805 650 4073	ZN 2 FL D CTRL MAINT	14-05	23.70
800 676 7516	OXLMD 31 RNCHO D LA ROS	17-11	339.58
	SPECIAL ASSESSMENTS TOTAL:		395.18

ASSESSOR INFORMATION: (805) 654-2181		PROPERTY VALUES
LAND MIN.		
IMPROVEMENTS		
PERS. PROP.		0
TOTALS		525,300
LESS: HOMEOWNER'S EXEMP.		7,000
OTHER EXEMPTION		0
NET TOTAL		518,300

TAX RATE AREA	PARCEL/I.D. NUMBER	STMT NO.	MAIL CODE	1st INSTALLMENT	2nd INSTALLMENT	TOTAL
03067	215-0-096-015	1279330		3,306.80	3,306.80	6,613.60
				DUE BY: 12/11/2017	DUE BY: 04/10/2018	

SECURED TAX PAYMENT STUB

Return Stub with Payment

TAX PLUS PENALTY:
3,667.48

1602 GABRIELLA DR

2017-18 PAY THIS AMOUNT:

DUE FEB 1 2018

BACKGROUND

Key Milestones to Date	Date
Initiated Organizational Assessment that Identified Deficits & Surpluses in Various Districts	September 2014
Contracted with NBS to Conduct In-Depth Review	May 2015
NBS Issued Findings in Report titled “Maintenance Assessment Districts Review Findings & Recommendations”	August 2015
Presentation of District Boundary, Budget and Levy Audits	March 1, 2016
Community Outreach Meetings with Residents	March 2016
Presentation on Community Outreach, Annual Administration, and Status Update	April 19, 2016
Presentation on 2016/17 Consolidated Engineer’s Report and Public Hearing	June 21, 2016
Presentation on Review of Historical District/Indirect Overhead Fees	February 7, 2017
Presentation on Removal of Major Traffic Corridor Improvements	March 7, 2017
Community Outreach Meetings with Residents	Spring 2017 and 2018
Annual Consolidated Engineer’s Report and Public Hearing	June 2017 and 2018

BACKGROUND

- A Special Districts Administrator was hired in 2016, followed by 2 full time inspectors
- Special Districts Division was established in 2017
 - Fund 172 was established to track division expenses
 - 2 Project Managers and 3 inspectors were hired to work exclusively in the assessment districts
- Service Levels document was created to specify various types of landscaping activities required depending upon the service level
- City's maintenance contract was re-written to incorporate stricter standards and requirements with which vendors must comply, including the ability to deduct payment when services are not performed to City standards – all districts bid out under new contract in April of 2017
- City staff began regularly attending HOA and neighborhood council meetings to discuss projects and obtain input from residents
- A dedicated District page was set up for each District on the City's website

SERVICE LEVELS DOCUMENT

Turf Maintenance Schedule	Frequency	Level of Service				
		A	B	C	D	F
Mowing, Edging & Trimming around sprinkler heads	Weekly	X				
	Every 2 Weeks		X			
	Every Third Week			X		
	Monthly				X	
	Quarterly					X
Aerate to relieve compaction and stress	3x per Year	X				
	Annually		X	X	X	
	Not Performed					X
Dethatch (remove thatch layer to promote growth)	Annually	X	X	X		
	Not performed				X	X
Overseed Stressed Areas	Annually	X	X	X		
	Not Performed				X	X
Fertilization Schedule	Frequency	Level of Service				
		A	B	C	D	F
Turf	Quarterly	X				
	Bi-annually		X			
	Annually			X	X	
	None					X
Shrubs, Ground Cover and Vines	Monthly	X				
	Quarterly		X			
	Bi-annually			X		
	Annually				X	
	None					X
Trash and Debris Removal	Frequency	Level of Service				
		A	B	C	D	F
Entire Area including but not limited to: Turf, Shrubs, Groundcover and Gutters	Daily	X				
	Weekly		X	X	X	
	Monthly					
	Not Performed					X

SERVICE LEVELS DOCUMENT CONTINUED

Weed Control Schedule		Frequency	Level of Service				
			A	B	C	D	F
Complete control and/or eradication of all weeds within the landscape as scheduled		Weekly	X				
		2x Month		X			
		Monthly			X	X	
		Not performed					X
Irrigation		Frequency	Level of Service				
			A	B	C	D	F
Inspect and adjust/repair as needed		Weekly	X				
		Every two weeks		X			
		Every Third week			X		
		Quarterly				X	
		Respond to complaints					X
Pruning and Trimming Schedule		Frequency	Level of Service				
			A	B	C	D	F
Groundcover/ Vines/Shrubs	Trim to prevent encroachment	Consistently Neat	X				
		Monthly		X	X		
		Quarterly				X	
		Semi-annually					X
Trees	Maintain all trees in their natural shape		X				
	Maintain all trees in their natural shape to 13.5' above street and 9' above sidewalks			X			
	Trim as needed to prevent encroachments or hazards				X		
	Report encroachments or hazards					X	X ⁷

BACKGROUND

- All Districts transitioned away from City Staff to private contractor
- In Fiscal Years 2015/16 and 2016/17, the General Fund subsidized Districts with negative fund balances, totaling \$2.93M
- Beginning in Fiscal Year 2016/17, levy credits were provided to Districts with large surplus fund balances – these levy credits have continued in FY 2017/18 and FY 2018/19
- Implementation of tracking, oversight and inspection program
 - Checks and balances for verification of work prior to paying invoices
 - Monthly inspections performed in all Districts to ensure compliance with contractual obligations
- Beginning in Fiscal Year 2017/18, the exterior improvements (major traffic corridors) were removed from the Districts and returned to the General Fund
 - As a result, 18 Districts were dissolved and surplus funds were reimbursed to the LMDs that did not receive a General Fund subsidy, totaling \$1,131,152.39 (761 parcel owners received checks)



ASSESSMENT DISTRICT MAINTENANCE CITATION FORM

District Name: _____

Deficiency Date(s): _____

Maintenance Item	Deficiency	1st Occurrence Warning Only	2nd Occurrence		3rd Occurrence		4th Occurrence	
Turf								
Mowing, Edging & Trimming			\$50.00		\$75.00		\$100.00	
Aeration			\$25.00		\$50.00		\$75.00	
Dethatching			\$100.00		\$150.00		\$200.00	
Overseeding			\$25.00		\$50.00		\$75.00	
Fertilization								
Turf			\$25.00		\$50.00		\$75.00	
Shrubs, Groundcover, Vines			\$25.00		\$50.00		\$75.00	
Trash and Debris Removal			\$25.00		\$50.00		\$75.00	
Weed Control			\$50.00		\$75.00		\$100.00	
Pest Control			\$50.00		\$75.00		\$100.00	
Pruning and Trimming								
Shrubs, Groundcover, Vines			\$75.00		\$100.00		\$150.00	
Trees			\$75.00		\$100.00		\$150.00	
Graffiti			\$25.00		\$50.00		\$75.00	
Irrigation			\$50.00		\$75.00		\$100.00	

Comments:

City of Oxnard _____

Date _____

This is a Maintenance Report generated by Cappsure for the property below.

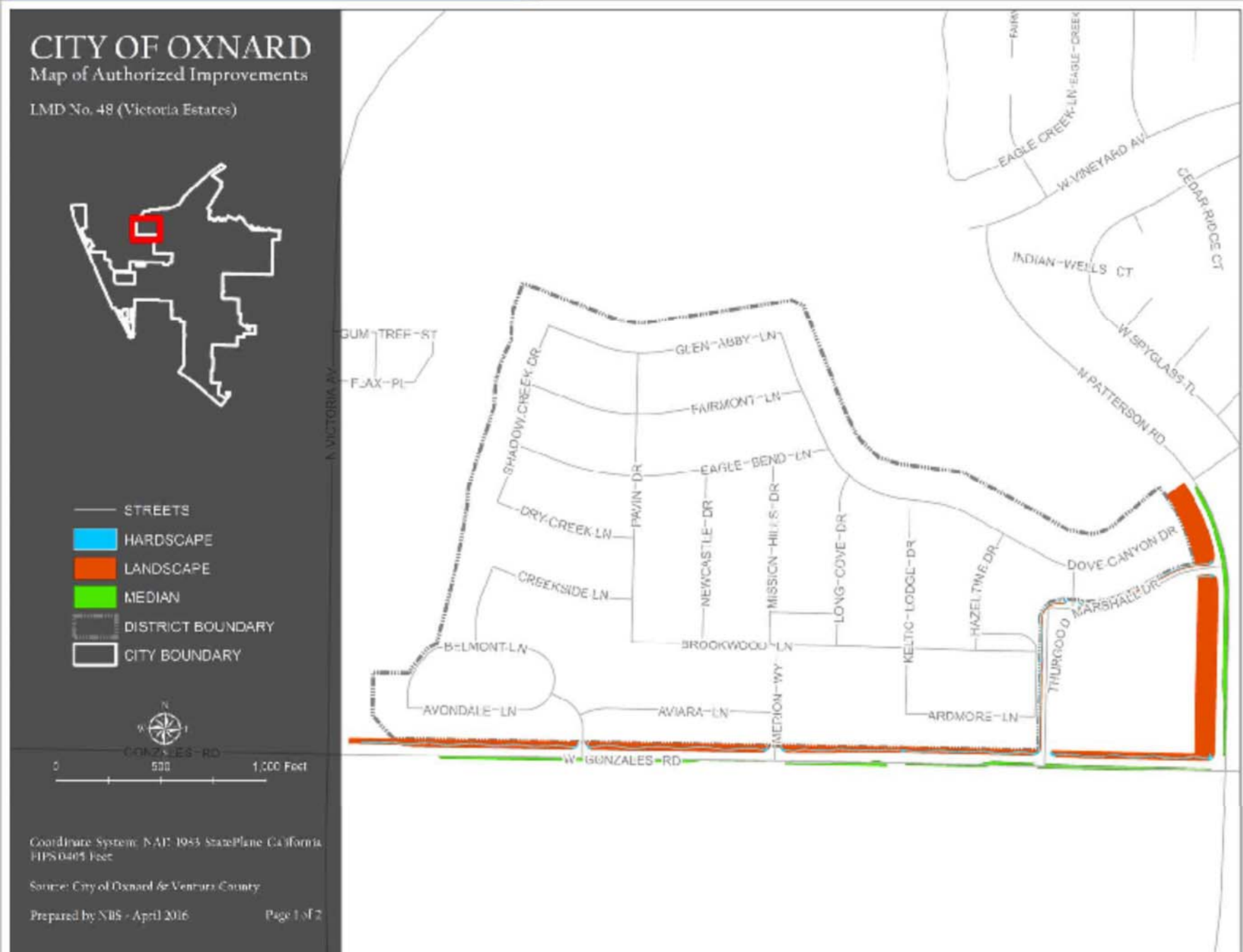
Property Name : 36 - Villa Sta Cruz/Villa Carmel

Creator : Joseph Beardshear

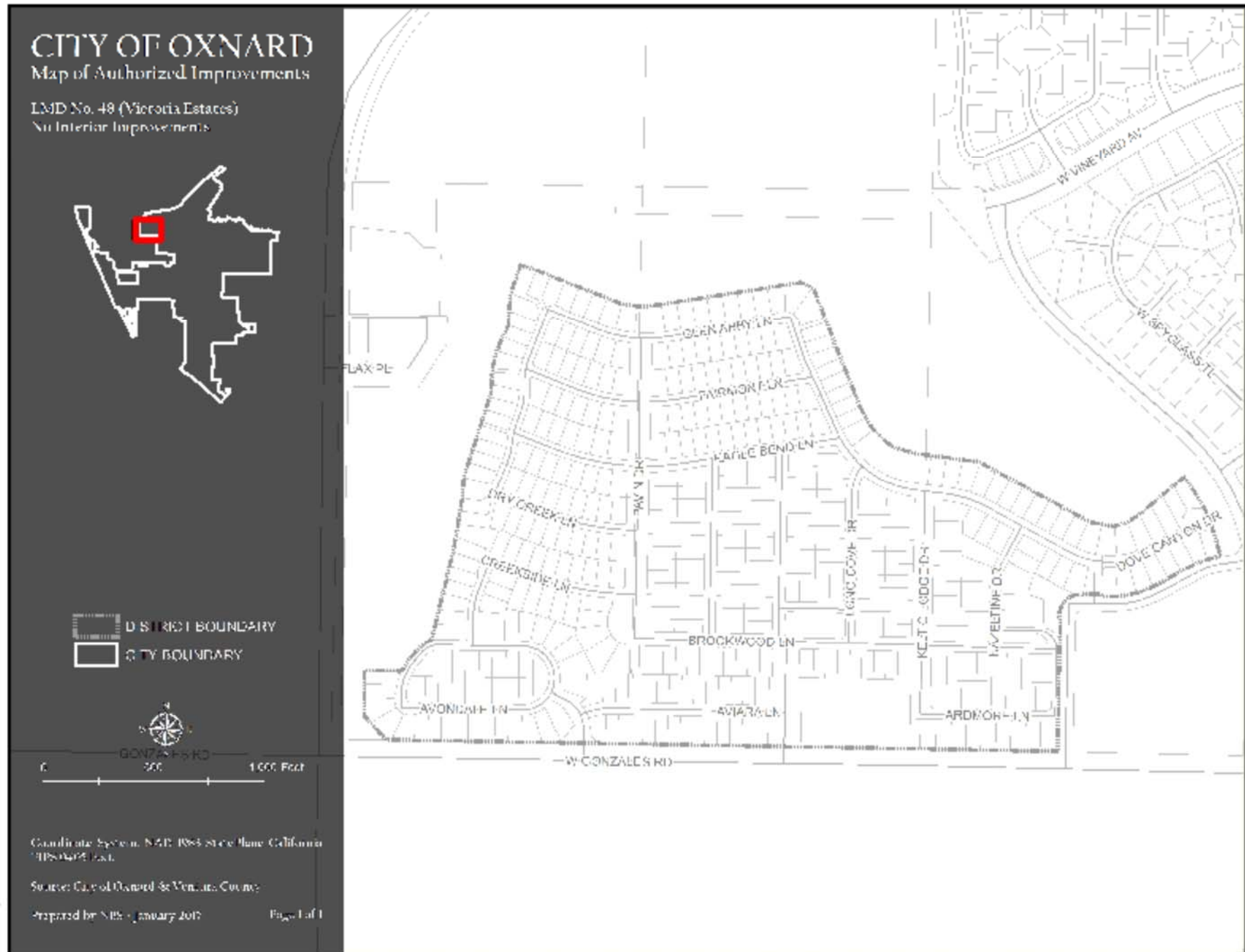
Date : 11/17/2017

S.NO	Item Name	Notes
1	UNSATIS. POOR COVERAGE-UNSATIS. POOR COVERAGE	Popup in middle row clogged.
2	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Popup broken. Needs to be replaced.
3	UNSATIS. POOR COVERAGE-UNSATIS. POOR COVERAGE	Nozzle clogged.
4	UNSATIS. GOPHER ISSUES-UNSATIS. GOPHER ISSUES	Gopher activity in parkway.
5	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Broken popup in planter. Possibly broken elbow.
6	UNSATIS. VALVE/CONTROLLER MALFUNCTION-UNSATIS. VALVE/CONTROLLER MALFUNCTION	Both parkway and turf did not respond to controller.
7	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Two broken popups and multiple nozzles clogged.
8	UNSATIS. POOR COVERAGE-UNSATIS. POOR COVERAGE	Multiple heads clogged along wall.
9	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Popup broken near tree in turf.
10	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Popup shooting into the air.
11	UNSATIS. POOR COVERAGE-UNSATIS. POOR COVERAGE	Multiple heads clogged in this section of parkway.
12	UNSATIS. POOR COVERAGE-UNSATIS. POOR COVERAGE	Multiple heads clogged in parkway.
13	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Two broken popups in turf.
14	UNSATIS. TRASH/DEBRIS-UNSATIS. TRASH/DEBRIS	Signs need to be removed off posts.
15	UNSATIS. MISSING BOLTS/BROKEN WELDS-UNSATIS. MISSING BOLTS/BROKEN WELDS	Fencing in general disrepair throughout districts.
16	UNSATIS. IRRIGATION BREAK/LEAK-UNSATIS. IRRIGATION BREAK/LEAK	Broken rotor in planter.

VICTORIA ESTATES PRIOR TO REMOVAL OF EXTERIOR IMPROVEMENTS



VICTORIA ESTATES – AFTER REMOVAL OF EXTERIOR IMPROVEMENTS



- Accounting processes were implemented to provide greater transparency
 - Staff time is tracked and charged according to the time spent on specific projects and/or issues
 - Separate line item established for contractor costs versus City staff time and separate line item established for contingency/special projects
 - Line items are regularly monitored and all charges to special districts lines must be approved by the Special Districts Division prior to paying invoices
 - Districts with utility caps are reconciled at the end of the Fiscal Year to ensure the cap is not exceeded
- Over 50 deferred maintenance and capital improvement projects have been completed since 2016
- Integrated 311 system to assist with tracking projects and resident concerns

WHAT'S HAPPENING NOW

- Deferred maintenance issues continue to be addressed and long term budget planning has been implemented to track maintenance and capital improvement costs
- 13 of the remaining Districts were formed prior to 1996/1997 and did not provide an inflator to increase the assessment over time as costs increase
 - 2 Districts were dissolved at the end of Fiscal Year 2017/18
 - Of the 11 Districts left, outreach will begin with affected property owners to discuss long term solutions
- The Special Districts team will be focusing on areas where drought tolerant landscaping can be installed and watering can be minimized – along with this, replacing overhead sprinklers with drip systems
 - First focus will be on those districts with utility caps as well as the districts with no inflator

DRY CREEK BED – CREATIVE SOLUTION TO DISSOLVE 2 DISTRICTS



WHAT'S HAPPENING NOW

- Continue community outreach to discuss improvement projects being considered over the next couple of years and learn more about what residents desire
- Improve webpages and explore additional social media platforms for distribution of information
- Bidding out of on call contracts for electrical, plumbing, tree removal, etc. to provide for faster response times when issues arise
- Special Districts Division recently moved from the Finance Department to Public Works, allowing for better sharing of resources and coordination between General Fund and Assessment District work

ADDITIONAL INFORMATION

- Special Districts Division Phone Number: (805) 385-7578
- Special Districts Webpage: <https://www.oxnard.org/city-department/finance/special-assessment-districts/>
- City of Oxnard Website: <https://www.oxnard.org/>

