

Downtown Santa Paula Property and Business Improvement District



**Santa Paula, California
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Prepared by:
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*Prepared pursuant to the State of California
Property and Business Improvement District Law of 1994
And Article XIID of the California Constitution
to create a property-based business improvement district*

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ENGINEER'S STATEMENT

This Report is prepared pursuant to Article XIIID of the California State Constitution (Proposition 218) and the State of California Property and Business Improvement District Law of 1994 as amended.

The Downtown Santa Paula Property-Based Business Improvement District ("PBID") will provide activities either currently not provided or are above and beyond what the City of Santa Paula provides. These activities will specially benefit each individual assessable parcel in the PBID. Every individual assessed parcel within the PBID receives special benefit from the activities identified under Section B of this Report. Only those individual assessed parcels within the PBID receive the special benefit of these proposed activities; parcels contiguous to and outside the PBID and the public at large may receive a general benefit, as outlined in Section E. The cost to provide general benefits, if any, will be funded from sources other than special assessments.

The duration of the proposed PBID is three (3) years, commencing January 1, 2020. An estimated budget for the PBID improvements and activities is set forth in Section D. Assessments will be subject to an annual increase of up to 5% per year as determined by the Owners' Association. Assessment increases must stay between 0% and 5% in any given year. Funding for the PBID improvements and activities shall be derived from a property-based assessment of each specially benefitted parcel in the PBID. A detailed description of the methodology for determining the proportional special benefit each individual assessable parcel receives from the service and the assessment for each parcel is set forth in Section E.

I hereby certify to the best of my professional knowledge that each of the identified assessable parcels located within the PBID will receive a special benefit over and above the benefits conferred to those parcels outside of the PBID boundary and to the public at large and that the amount of the proposed special assessment is proportional to, and no greater than the special benefits received.



Respectfully submitted,

Terrance E. Lowell, P.E.

SECTION A: LEGISLATIVE AND JUDICIAL REVIEW

Property and Business Improvement District Law of 1994

The Property and Business Improvement District Law of 1994 (the "State Law") is the legislation that authorizes the City to levy assessments upon real property for the purposes of providing improvements and activities that specially benefit each individual assessed parcel in the PBID. The purpose of the PBID is to encourage commerce, investment, and business activities. In order to meet these goals PBIDs typically fund activities and improvements, such as, enhanced safety and cleaning. Unlike other assessment districts which fund the construction of public capital improvements or maintenance thereof, PBIDs provide activities and improvements "to promote the economic revitalization and physical maintenance of the business districts of its cities in order to create jobs, attract new businesses, and prevent the erosion of the business districts." (Streets and Highways Code Section 36601(b)). The improvements and activities funded through the PBID are over and above those already provided by the City within the PBID's boundaries. Each of the PBID activities or improvements is intended to increase building occupancy and lease rates, to encourage new business development, attract businesses that serve the community, and improve the quality of life.

Specifically, the State Law defines "Improvements" and "Activities" as follows:

*"Improvement" means the acquisition, construction, installation, or maintenance of any tangible property with an estimated useful life of five years or more..."*¹

"Activities" means, but is not limited to, all of the following:

- (a) Promotion of public events.*
- (b) Furnishing of music in any public place.*
- (c) Promotion of tourism within the district.*
- (d) Marketing and economic development, including retail retention and recruitment.*
- (e) Providing security, sanitation, graffiti removal, street and sidewalk cleaning, and other municipal services supplemental to those normally provided by the municipality.*
- (f) Other services provided for the purpose of conferring special benefit upon assessed real property.*²

Article XIID of the State Constitution

In 1996, California voters approved Proposition 218, codified in part as Article XIID of the State Constitution. Among other requirements, Article XIID changes the way local agencies enact local taxes and levy assessments on real property. It states, in relevant part, that:

(a) An agency which proposes to levy an assessment shall identify all parcels which will have a special benefit conferred upon them and upon which an assessment will be imposed. The proportionate special benefit derived by each identified parcel shall be determined in relationship to the entirety of the capital cost of a public improvement, the maintenance and operation expenses of a public improvement, or the cost of the property

¹ California Streets and Highways Code, Section 36610.

² California Streets and Highways Code, Section 36606.

related service being provided. No assessment shall be imposed on any parcel which exceeds the reasonable cost of the proportional special benefit conferred on that parcel. Only special benefits are assessable, and an agency shall separate the general benefits from the special benefits conferred on a parcel. Parcels within a district that are owned or used by any agency, the State of California or the United States shall not be exempt from assessment unless the agency can demonstrate by clear and convincing evidence that those publicly owned parcels in fact receive no special benefit.

(b) All assessments shall be supported by a detailed engineer's report prepared by a registered professional engineer certified by the State of California.³

"Special benefit" means a particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large. General enhancement of property value does not constitute "special benefit."⁴

Judicial Guidance

Since the enactment of Article XIID, the courts have rendered opinions regarding various aspects of Article XIID. The notable portions of cases that apply to assessment districts in general and this Downtown Santa Paula PBID in particular are noted below.

"The engineer's report describes the services to be provided by the PBID [i.e. the PBID]; (1) security, (2) streetscape maintenance (e.g., street sweeping, gutter cleaning, graffiti removal), and (3) marketing, promotion, and special events. They are all services over and above those already provided by the City within the boundaries of the PBID. And they are particular and distinct benefits to be provided only to the properties within the PBID, not to the public at large—they 'affect the assessed property in a way that is particular and distinct from [their] effect on other parcels and that real property in general and the public at large do not share."⁵

"...separating the general from the special benefits of a public improvement project and estimating the quantity of each in relation to the other is essential if an assessment is to be limited to the special benefits."⁶

"...the agency must determine or approximate the percentage of the total benefit conferred by the service or improvement that will be enjoyed by the general public and deduct that percentage of the total cost of the service or improvement from the special assessment levied against the specially benefitted property owners."⁷

"...even minimal general benefits must be separated from special benefits and quantified so that the percentage of the cost of services and improvements representing general benefits, however slight, can be deducted from the amount of the cost assessed against specially benefitting properties."⁸

The contents of this Engineer's Report are prepared in compliance with the above noted authorizing legislation, the State Constitution and the judicial opinions.

³ Section 4, Article XIID of the State Constitution.

⁴ Section 2 (i), Article XIID of the State Constitution.

⁵ Dahms v. Downtown Pomona Property and Business Improvement District (2009) 174 Cal.App. 4th 708, 722.

⁶ Beutz v. County of Riverside (2010) 184 Cal. App. 4th 1516, 1532.

⁷ Golden Hill Neighborhood Association, Inc. v. City of San Diego (2011) 199 Cal.App. 4th 416, 438.

⁸ Golden Hill Neighborhood Association, Inc. v. City of San Diego (2011) 199 Cal.App. 4th 416, 439.

SECTION B: IMPROVEMENTS AND ACTIVITIES

The Downtown Santa Paula PBID Steering Committee collectively determined the priority for improvements and activities that the PBID will deliver. The primary needs as determined by the property owners are Downtown Ambassadors, Maintenance Services and Beautification improvements. Specifically, the Downtown Santa Paula PBID shall provide the following activities.

Environmental Activities

To respond to stakeholder priorities and guiding principles to make Downtown Santa Paula more welcoming, clean and beautiful, the PBID will fund an Ambassador program as well increased maintenance and beautification efforts. The PBID Environmental Activities are intended to improve commerce and quality of life by making each individually assessed parcel safer, cleaner and more attractive, which will encourage investment dollars and generate additional pedestrian traffic.

Downtown Ambassadors

Deter and Report

- Continually circulate through the District on foot and bicycle to provide high visibility to deter illegal or threatening behaviors
- Report illegal and threatening activities, crimes or disturbances to Police for response
- Assist police by being “witness complainants” in cases involving Ambassadors

Quality of Life Crime Deterrence

- Ambassadors will engage people who are engaging in aggressive panhandling, to suggest and coordinate services.
- Document each engagement and activity to track the frequency of illegal and threatening behaviors to mobilize enforcement efforts of those people resisting services

Continual Engagement of the Homeless Population

- Continually circulate through the district to identify the population that is engaged in illegal or threatening behaviors
- Engage homeless people to build relationships and encourage assistance from social service providers to coordinate service delivery
- Triage the needs of homeless people to encourage appropriate services from provider agencies
- Document all interactions so that these individuals can be prioritized based on need

Safety Escorts

- Ambassadors can meet downtown employees or visitors at their location and escort them to their destination within the PBID boundary
- Pedestrians can request a safety escort by contacting the promoted number, which is the shared cell phone carried by on-duty staff members

Public Engagement & Hospitality

- Ambassadors will be a highly visible presence continually circulating throughout their assigned zones
- Ambassadors will engage visitors of the public with a friendly greeting and be very responsive to opportunities to provide directions, recommendations, or assistance
- Ambassadors ultimately will be one of the caring faces of Downtown



Reporting

Ambassadors document their activities and accomplishments in the field in order to track:

- All tasks to substantiate activity
- Incident Reports

Maintenance Services

Litter

Debris will be removed from sidewalks, alleys and street gutters. Debris includes: Loose trash | Cigarette butts | Sediment and loose rock

Weeds

Weeds will be removed from sidewalk cracks and building lines.

Isolated weeds will be pulled while Ambassadors are on manual cleaning patrol. Areas of widespread growth will be removed by using a weed eater.

Graffiti

Graffiti will be removed immediately upon identification from public fixtures such as light posts, utility boxes and signs using the least evasive methods possible. Our methods of graffiti removal include wiping with graffiti removal chemicals, scraping, painting, or power washing.

Attention to Detail

While on normal cleaning rounds Ambassadors will be trained to tend to nearly every detail they might encounter in the public right of way to include: damp wipe public fixtures, such as trash can lids, to create a clean appearance, damp wiping and inspecting the inside of fixed news rack corrals for litter and debris Inspecting free publication boxes to make sure litter or other items are not placed inside.

Power Washing

Regularly Scheduled Washing – The entirety of the district will be washed on a bi-annual basis

Spot Washing – we will work to immediately address unsightly spills and stains in the district

Special Projects

Special projects will be initiated to tackle issues that are overlooked or items that can leave a lasting impression on stakeholders in the Downtown. Special project opportunities include: painting of street fixtures to include utility boxes, benches, light poles, etc, thorough cleaning of tree wells, power washing and repair of waste cans, and thorough scrubbing and cleaning of street fixtures.



Beautification & Placemaking

In addition to clean and safe services, the PBID budget may include funds for beautification and placemaking improvements that are defined as cosmetic enhancements that improve the appearance and walkability within the PBID, in turn encouraging customer traffic and improved quality of life for residents. Examples of beautification improvements might include:

- Directional/wayfinding signage or themed signage
- Street furniture and amenities, such as benches, kiosks and lighting
- Design and installation of flowering planters and baskets
- Design and installation of art and decorative elements
- Holiday décor or tree lighting
- Bicycle racks and other hardware
- Urban design and/or planning services to advance beautification efforts
- Other cosmetic enhancements that improve the PBID's appearance



Operations & Communication

The Downtown Santa Paula PBID will be managed by a full-time staff that oversees the PBID's services and actively advocates on behalf of the PBID property owners to ensure that City and County services and policies support the PBID. The special benefit to parcels from these services is increased business revenue and tenant occupancy due to increased commercial activity and enhanced commerce in part due to the work of the management staff as stated above.

Also included in this budget item are costs to renew the PBID, conduct a yearly financial review, City fees, and uncollectible assessments.

SECTION C: BENEFITTING PARCELS

PBID Boundary Description

The District encompasses approximately 3 whole and partial blocks in the commercial core of Downtown Santa Paula. The PBID boundary is concentrated with parcels fronting primarily along Main Street between 8th Street and 10th Street as well as the parcels on the east of 10th Street between Main Street and Ventura Street.

The PBID boundary is illustrated by the map on the following page.

SECTION D: PROPORTIONAL BENEFITS

Methodology

Article XIIIID Section 4(a) of the State Constitution states that "The proportionate special benefit derived by each identified parcel shall be determined in relationship to the entirety of the capital cost of the public improvement, the maintenance and operation expenses of a public improvement, or the cost of the property related service being provided."

Determining the proportionate special benefit among the parcels of real property within the proposed PBID which benefit from the proposed improvements, services, and activities is the result of a five-step process:

1. Defining the proposed activities.
2. Quantifying the degree to which the activities provide general versus special benefits.
3. Determining which parcels specially benefit from the proposed activities.
4. Determining the amount of special benefit each parcel receives.
5. Determining the proportional special benefit a parcel receives in relation to the amount of special benefit all other parcels in the PBID receive.

Each identified parcel within the PBID will be assessed based upon the special benefits received by that parcel, as determined by analyzing each parcel's unique characteristics in relationship to all other specially benefitted parcels' characteristics. As a result of this analysis, each parcel will be assessed at a rate which is commensurate with the amount of special benefits received.

Proportional Benefit Units

Each parcel's proportional special benefit from the PBID activities is determined by analyzing three land use factors: Building Square Footage, Lot Square Footage, and Linear Street Frontage. These land use factors are an equitable way to identify the proportional special benefit that each of the parcels receive. Building square footage is relevant to the current use of a property and is also closely correlated to the potential pedestrian traffic from each parcel and the demand for PBID activities. A parcel's lot square footage reflects the long-term value implications of the improvement district. A parcel's linear street frontage is relevant to the street level usage of a parcel and the demand for PBID activities. Together, these land use factors serve as the basic unit of measure to calculate how much special benefit each parcel receives in relationship to the district as a whole, which is the basis to then proportionately allocate the cost of the special benefits.

Building square footage is defined as the total building square footage as determined by the outside measurements of a building. The gross building square footage is taken from the County of Ventura Assessor's records. Fifty percent (50%) of the assessment budget is allocated to the sum of building square footage plus lot square footage to account for the special benefit to each parcel's land uses, its residents, and tenants and the long-term development potential.

Lot square footage is defined as the total amount of area within the boundaries of the parcel. The boundaries of a parcel are defined on the County Assessor parcel maps. Fifty percent (50%) of the assessment budget is allocated to the sum of building square footage plus lot square footage to account for the special benefit to each parcel's land uses, its residents, and tenants

and the long-term development potential.

Linear street frontage is defined as the number of linear feet of each parcel that directly fronts a street that will receive the PBID activities. Corner parcels or whole block parcels will be assessed for the sum of all the parcels' street frontage. Fifty percent (50%) of the assessment budget is allocated to linear street frontage to account for the special benefit received at the street level of each parcel.

Each one of these land use factors represents the benefit units allocated to each specially benefitted parcel. The total number of benefit units are as follows:

Land Use	Lot + Bldg SF	Linear Frontage
Commercial/Government	635,596	2,911
Residential/Non-Profit	28,013	125
TOTAL:	663,609	3,036

Land Use Considerations

All parcels within the PBID specially benefit from the PBID activities but not to the same degree. The proportional special benefit and assessment methodology provides the following land use considerations for properties used exclusively for single family residential and non-profit parcels:

Residential and Non-Profit: Owner-occupied residential single family and condominiums and non-profit owned properties specially benefit from the PBID activities but differently than commercial parcels. Owner-occupied residential single family and condominiums and non-profit owned parcels will not receive the same special benefit as commercial because those uses are not engaged in commercial or customer attraction activities. To account for the special benefit these land uses do receive, they will be assessed at 50% of that assessed on commercial parcels. All commercial and mixed-use parcels with residential uses will be subject to an adjusted assessment rate for the owner-occupied residential square footage of that parcel. The commercial square footage for that parcel will be assessed the commercial assessment rate. Rental residential units (i.e. apartments, 5 units or greater) are considered income-producing commercial property and will be assessed at commercial rates, receiving full benefit from all PBID services.

SECTION E: SPECIAL and GENERAL BENEFITS

State Law requires that assessments be levied according to the estimated special benefit each assessed parcel receives from the activities and improvements. Article XIID Section 4(a) of the California Constitution in part states that “only special benefits are assessable,” which requires that we separate the general benefits, if any, from the special benefits provided by the proposed activities and improvements.

As of January 1, 2015, the State Legislature amended the 1994 Act to clarify and define both special benefit and general benefit as they relate to the improvements and activities these districts provide. Specifically, the amendment (Section 36615.5 of the Streets and Highways Code) defines special benefit as follows: “Special benefit’ means, for purposes of a property-based district, a particular and distinct benefit over and above general benefits conferred on real property located in a district or to the public at large. Special benefit includes incidental or collateral effects that arise from the improvements, maintenance, or activities of property-based districts even if those incidental or collateral effects benefit property or persons not assessed. Special benefit excludes general enhancement of property value.”

In addition, the amendment (Section 36609.5 of the Streets and Highways Code) defines general benefit as follows: “General benefit’ means, for purposes of a property-based district, any benefit that is not a ‘special benefit’ as defined in Section 36615.5.”

Furthermore, the amendment (Section 36601(h)(2)) states: “Activities undertaken for the purpose of conferring special benefits upon property to be assessed inherently produce incidental or collateral effects that benefit property or persons not assessed. Therefore, for special benefits to exist as a separate and distinct category from general benefits, the incidental or collateral effects of those special benefits are inherently part of those special benefits. The mere fact that special benefits produce incidental or collateral effects that benefit property or persons not assessed does not convert any portion of those special benefits or their incidental or collateral effects into general benefits.”

Special Benefit Analysis

All special benefits derived from the assessments outlined in this report are for property related activities directly benefiting each individual assessed parcel in the PBID. The special benefit must affect the individual assessable parcel in a way that is particular and distinct from its effect on other parcels, and that real property in general and the public at large do not share. No parcel’s assessment shall be greater than the special benefits received.

Streets and Highways Code Section 36601(e) states that “Property and Business Assessment Districts formed throughout this state have conferred special benefits upon properties and businesses within their districts, and have made those properties and businesses more useful by providing the following benefits: (1) Crime reduction. A study by the Rand Corporation has confirmed a 12-percent reduction in the incidence of robbery and an 8-percent reduction in the total incidence of violent crimes within the 30 districts studied. (2) Job creation. (3) Business attraction. (4) Business retention. (5) Economic growth. (6) New investments.”

The PBID’s goal is to fund activities and improvements that provide a cleaner, safer, and more

attractive and economically vibrant environment as outlined in Section 4. The goal of improving the economic vitality is achieved by improving the safety, cleanliness, and economic vitality of each specially benefitted parcel in an effort to increase commerce, to increase building occupancy and revenues, and to attract more customers, employees, tenants, investors and residents.

Specifically, each parcel specially benefits from each of the PBID activities as defined below.

Environmental Activities

The enhanced downtown ambassadors, cleaning and beautification activities make the area safer and more attractive for businesses, customers, residents, and ultimately private investment. When business location decisions are made, "lower levels of public safety lead to increased uncertainty in decision making and can be perceived as a signal of a socio-institutional environment unfavorable for investment. Uncertainty affects the investment environment in general. But in particular, it increases the fear of physical damage to investment assets (or to people) or their returns...Almost universally, places with lower crime rates are perceived as more desirable".⁹ Once economic investment occurs within the district, pedestrian traffic and commercial activity will increase.

All parcels will specially benefit from these activities, such as:

- Increased security patrol to provide a higher level of safety to property, residents, customers, employees and visitors as they pass through the district;
- Enhancing safety patrols to deter illegal behaviors, such as vandalism and threatening behaviors;
- Connecting the homeless to available resources and/or social services;
- Removing graffiti from buildings to keep the aesthetic appeal uniform throughout the district;
- Maintaining sidewalks in front of each parcel creates a cohesive environment and allows pedestrians to move freely throughout the district. "Walkable communities offer many financial benefits, such as a reduction in healthcare costs. Homes with sidewalks tend to sell for more money and in less time than similar homes without sidewalks. Businesses also benefit as residents are more likely to shop locally when there is increased connectivity between residential and business/commercial districts. The well-maintained sidewalks, accessibility, and inviting atmosphere of downtown helps to attract tourists."¹⁰

Special Benefit Conclusion

Based on the special benefits each assessed parcel receives from the PBID activities, we concluded that each of the proposed activities provides special benefits to the real property within the PBID, and that each parcel's assessment is in direct relationship to and no greater than the special benefits received.

The special benefit to parcels from the proposed PBID activities and improvements described in this report is equal to or exceeds the total amount of the proposed assessment. Each individual

⁹ "Accelerating economic growth and vitality through smarter public safety management" IBM Global Business Services Executive Report, September 2012, pg. 2

¹⁰ "Benefits of Sidewalks", Iowa Healthiest State Initiative, November 1, 2017

assessed parcel's assessment is no greater than the special benefit it receives from the PBID activities.

General Benefit Analysis

As required by the State Constitution Article XIID Section 4(a), the general benefits of an assessment district must be quantified and separated out so that the cost of the activities that are attributed to general benefit are deducted from the cost assessed against each specially benefitted parcel. General benefits are benefits from the PBID activities and improvements that are not special in nature, are not "particular and distinct", and are not over and above the benefits that other parcels receive. This analysis will evaluate and determine the level of general benefits that (1) parcels inside of the PBID, (2) parcels outside of the PBID, and (3) the public at large may receive.

General Benefit to Parcels Inside of the PBID

The PBID provides funds for activities and improvements that are designed and created to provide special benefits to each individually assessed parcel within the PBID. Each individual assessed parcel will specially benefit from the cleaner and safer public rights-of-way and, thus 100% of the benefits conferred on the parcels within the PBID are distinct and special in nature, and that there is no general benefit to these parcels.

General Benefit to Parcels Outside of the PBID

All the PBID activities and improvements are provided solely to each of the individual assessed parcels in the Downtown Santa Paula PBID boundary. Each of the PBID activities is provided to the public rights-of-way (streets, sidewalks) adjacent to all specially benefitted parcels in the PBID. None of the surrounding parcels will directly receive any of the PBID activities. Any benefits these parcels may receive are incidental to providing special benefits to the assessed parcels, and thus any cost associated to the incidental benefits are not reduced from the cost of providing special benefit.

General Benefit to the Public At Large

In addition to general benefit analysis to the parcels outside of the Downtown Santa Paula PBID boundary, there may be general benefits to the public at large, i.e., those people that are either in the PBID boundary and not specially benefitted from the activities, or people outside of the PBID boundary that may benefit from the PBID activities. In the case of the Downtown Santa Paula PBID, the public at large are those people that are within the PBID boundary that do not pay an assessment and do not specially benefit from the PBID activities.

To calculate the general benefit the public at large may receive we determine the percentage of each PBID activity budget that may benefit the general public. In this case, the environmental activities may benefit the general public to some degree, as the general public may appreciate the enhanced level of maintenance and security as it passes through the district. To quantify this, we first determine a general benefit factor for the environmental activities. The general benefit factor is a unit of measure that compares the special benefit that the assessed parcels receive compared to the general benefit that the general public receives. To determine the general benefit factor, we used previous districts that conducted intercept surveys in San Francisco (Union Square and West Portal) and Los Angeles (Historic Downtown, Leimert Park, Arts District, Downtown Industrial, Fashion District, and Sherman Oaks). The intent of the surveys was to determine what percentage of the general public was just passing through the district without any

intent to engage in commercial activity. The surveys concluded that on average 1.4% of the respondents were within the PBID boundary with no intent to engage in any business activity. Here, since the PBID is designed to promote a business and residential climate that encourages development, investment, and commerce, it follows that the benefits received by these pedestrians do not translate to a special benefit to the assessed parcels. In other words, based on the results of these surveys it is reasonable to conclude that 1.4% of environmental activities provide general benefits. However, to be conservative and to account for any variance in district type, size and services provided, we applied a 2.5% general public benefit factor to account for these variances. The general benefit factor is then multiplied by the PBID budget to determine the overall general. The following table illustrates this calculation.

<u>Activity</u>	A <u>Budget Amount</u>	B <u>General Benefit Factor</u>	C <u>General Benefit Allocation (A x B)</u>
Safe/Clean/Beautiful	\$80,000	2.5%	\$2,375

This analysis indicates that \$2,375 of the PBID activities may be attributed to general benefit to the public at large, and must be raised from sources other than special assessments.

General Benefit Conclusion

Using the sum of the three measures of general benefit described above we find that \$2,375 or 2.5% of the total budget may be general in nature and will be funded from sources other than special assessments.

SECTION F: COST ESTIMATE

2020 PBID Assessment Budget

The following table outlines the PBID maximum assessment budget for 2020.

EXPENDITURES	TOTAL BUDGET	% of Budget
Environmental Activities Safety Ambassadors, Maintenance, Beautification	\$80,000.00	84.21%
Management/Advocacy	\$15,000.00	15.79%
Total Expenditures	\$95,000.00	100.00%
REVENUES		
Assessment Revenues	\$92,625.00	97.50%
Other Revenues (1)	\$2,375.00	2.50%
Total Revenues	\$95,000.00	100.00%

(1) Other non-assessment funding to cover the cost associated with general benefit.

Budget Adjustments

Annual assessments may increase no more than 5% per year, consistent with the increase in consumer price index (CPI) and/or other increases in program costs. The determination of annual adjustments in assessment rates will be subject to the review and approval of the board of the Owners' Association.

Bond Issuance

The District will not issue bonds.

SECTION G: APPORTIONMENT METHOD

As previously discussed, the PBID services and activities will be provided uniformly throughout the district. To apportion the cost of the special benefits received from these services is in direct relationship to each lot square footage, building square footage and linear street frontage. The assessable footages for each land use type is indicated in the table below.

Land Use	Lot + Bldg SF	Linear Frontage
Commercial/Government	635,596	2,911
Residential/Non-Profit	28,013	125
TOTAL:	663,609	3,036

To calculate the assessment rate for each assessable divide the PBID assessment budget of \$92,625 by 2 and then divide that by either the total of Lot + Bldg SF or Linear Frontage. Based on this calculate the following are the calculated rates for each assessment factor and each benefit zone for fiscal year 2019/2020.

Land Use	Lot + Bldg Assmt	Linear Assmt
Commercial/Government	\$0.0698	\$15.2544
Residential/Non-Profit	\$0.0349	\$7.6272

Sample Parcel Assessments

To calculate the assessment for a commercial parcel with 10,000 square foot lot + building plus 50 linear feet, the calculation is as follows:

Lot + Building: 10,000 x \$0.0698 = \$698.00
 Linear Frontage: 50 x \$15.2544 = \$762.72
 TOTAL ASSESSMENT: \$1,460.72

To calculate the assessment for a non-profit parcel with the same parcel characteristics, the calculation is as follows:

Lot + Building: 10,000 x \$0.0349 = \$349.00
 Linear Frontage: 50 x \$7.6272 = \$381.36
 TOTAL ASSESSMENT: \$730.36

The assessment calculation is the same for every parcel in the Downtown Santa Paula PBID respective of its land use type.

Maximum Annual Assessment Adjustments

Annual assessments may increase no more than 5% per year, consistent with the increase in consumer price index (CPI) and increases in program costs. The determination of annual adjustments in assessment rates will be subject to the review and approval of the Owners' Association of the Downtown Santa Paula PBID.

Budget Adjustment

Any annual budget surplus or deficit will be rolled into the following year's PBID budget. The budget will be set accordingly, within the constraints of the management plan to adjust for surpluses or deficits that are carried forward.

Future Development

Based on new development in the Downtown Santa Paula PBID, the amount of assessable square footage in the Downtown Santa Paula PBID may change over time. These changes could modify the total square footage assessed for affected parcels. Therefore, in future years, the assessments levied against Downtown Santa Paula PBID parcels may change in accordance with the assessment methodology formula and rates in the Management District Plan and Engineer's Report. Changes to the assessment formula would require the approval of an amendment to the Management Plan.

SECTION H: ASSESSMENT ROLL

The total assessment amount for FY 2019/2020 is \$92,625 apportioned to each individual assessed parcel, as follows.

APN	OWNER NAME	Site Address	Parcel Assmt
101-0-214-225	10TH STREET 2017 TRUST	125 S 10TH ST	\$5,541.91
103-0-111-095	ADELSBERGER MARI ANNE BURTON	959 E MAIN ST	\$2,629.10
103-0-102-275	ALAMILLO ANSELMO-ORALIA TRUST	938 E MAIN ST	\$911.76
103-0-111-085	ALAMILLO ANSELMO-ORALIA TRUST	971 E MAIN ST	\$1,815.54
103-0-101-115	ARANA JOSE L-MARIA D	819 E MAIN ST	\$712.86
103-0-101-105	ARENAS MANUEL-EUGENIA B	827 E MAIN ST	\$1,342.81
103-0-112-185	BANK OF THE SIERRA	901 E MAIN ST	\$1,750.22
103-0-102-235	BERMUDEZ EDWARD F	924 E MAIN ST	\$821.90
103-0-112-165	BERMUDEZ EDWARD F	925 E MAIN ST	\$1,664.20
103-0-102-245	BINSLEY MICHAEL	926 E MAIN ST	\$940.52
103-0-113-075	BOJANOWSKI KRZYSZTOF	972 E MAIN ST	\$928.71
103-0-111-115	CASTANEDA RAY-MARHTA E	951 E MAIN ST	\$1,609.81
103-0-111-075	COVARRUBIAS EFRAIN-EVELIA	989 E MAIN ST	\$1,672.84
103-0-103-065	DENNIS JOHN L-SUSAN A TRUST	824 E MAIN ST	\$1,115.16
103-0-102-165	FLAG DAY TRUST ET AL	856 E MAIN ST	\$1,736.35
103-0-101-135	GARCIA JOSE G-LUZ M TRUST	801 E MAIN ST	\$2,405.36
103-0-113-085	GOMEZ CECILIO RANGEL	974 E MAIN ST	\$1,857.42
103-0-101-125	GORDON PAUL	817 E MAIN ST	\$714.11
103-0-102-195	GOULD JOHN J TRUST	908 E MAIN ST	\$872.06
103-0-102-215	HANSEN GLORIA	912 E MAIN ST	\$584.24
103-0-103-045	HOANG CHRISTOPHER V-ANNIE C	800 E MAIN ST	\$1,551.41
103-0-111-125	IADEVAIA ELMO JR TRUST	107 N MILL ST	\$1,326.15
103-0-102-175	IOOF LODGE 314	866 E MAIN ST	\$840.30
103-0-102-295	KANG CHONG K	944 E MAIN ST	\$777.41
103-0-102-185	KEOAX PROPERTIES LLC	900 E MAIN ST	\$805.69
103-0-102-285	LAMBERT PARTNERS	940 E MAIN ST	\$940.99
103-0-102-375	LAMBERT WILLIAM S-LENORE TRUST	834 E MAIN ST	\$2,395.02
103-0-102-225	LEAVENS LESLIE A	914 E MAIN ST	\$2,849.55
103-0-112-375	LEAVENS LESLIE A	915 E MAIN ST	\$1,041.20
103-0-101-075	LIPPERTLAND LLC	861 E MAIN ST	\$1,242.08
103-0-102-265	LIPPERTLAND LLC	932 E MAIN ST	\$1,144.56
103-0-113-155	LIZARRAGA LEOVARDO-MANUELA	962 E MAIN ST	\$474.23
103-0-112-095	LOZA INVESTMENTS	949 E MAIN ST	\$1,211.35
103-0-112-135	LOZA INVESTMENTS	939 E MAIN ST	\$938.34
103-0-102-255	LOZA INVESTMENTS LLC	930 E MAIN ST	\$1,070.43
103-0-102-305	LOZA INVESTMENTS LLC	948 E MAIN ST	\$2,466.84
103-0-113-135	MANZANO FRANK L-ANNA M TRUST	964 E MAIN ST	\$984.68
103-0-103-055	MATILIJIA INVESTMENT PROPERTIES	814 E MAIN ST	\$3,455.43
103-0-112-155	MATILIJIA INVESTMENT PROPERTIES LLC	929 E MAIN ST	\$2,850.52
103-0-101-085	MATILIJIA INVESTMENT PROPERTY	851 E MAIN ST	\$2,283.69
103-0-102-205	MEAD EDWARD D III-CLAUDETTE	910 E MAIN ST	\$715.11
101-0-214-095	MORA JESUS P TRUST ESTATE	133 S 10TH ST	\$510.41

APN	OWNER NAME	Site Address	Parcel Assmt
103-0-113-065	RODA ROSALINE O TRUST	968 E MAIN ST	\$960.11
101-0-214-085	SANDOVAL ADAN-LESVIA P	135 S 10TH ST	\$499.70
101-0-214-155	SANDOVAL ADAN-LESVIA P	1000 E MAIN ST	\$3,105.71
103-0-113-025	SANDOVAL ADAN-LESVIA P	958 E MAIN ST	\$721.60
101-0-214-165	SANDOVAL ADAN-LESVIA P S	1008 E MAIN ST	\$1,664.53
103-0-113-095	SANTA PAULA CITY OF	982 E MAIN ST	\$924.38
103-0-112-385	SCHWABAUER MARY SURVIVORS TRUST ET AL	915 E MAIN ST	\$2,396.17
101-0-214-215	SHAH ZAHID M	145 S 10TH ST	\$3,373.12
103-0-113-035	SUAREZ RUBEN G-ELIZABETH M	960 E MAIN ST	\$618.62
103-0-112-125	TURNER JONATHAN M-ROSLYNN A	941 E MAIN ST	\$782.65
101-0-212-155	UNION OIL COMPANY OF CALIFORNIA	1001 E MAIN ST	\$1,325.62
101-0-212-185	UNION OIL COMPANY OF CALIFORNIA	1001 E MAIN ST	\$685.74
103-0-113-105	VILLALPANDO ANGELINA M TRUST	984 E MAIN ST	\$1,648.41
103-0-102-145	WERNER ROBERT L-SUSAN L TRUST	848 E MAIN ST	\$1,592.87
103-0-102-155	WERNER ROBERT L-SUSAN L TRUST	854 E MAIN ST	\$795.02
103-0-101-095	WESTERDALE DONALD-MARILYN TRUST	847 E MAIN ST	\$4,196.80
103-0-111-105	WHITE ROBERT A-MARY R TRUST	957 E MAIN ST	\$876.37
103-0-112-105	YEPEZ MARIA G	947 E MAIN ST	\$894.81
103-0-112-115	YEPEZ MARIA G	945 E MAIN ST	\$784.24
103-0-112-145	YOO YOUNG-HIZA	935 E MAIN ST	\$1,276.28
TOTAL:			\$92,625.00