




Division of Fiscal Services
Telephone (619) 691-5550
FAX (619) 425-3394

MEMORANDUM

DATE: July 31, 2015

TO: Karen Janney, Superintendent

FROM: Karen Michel, Chief Financial Officer 

RE: SUPERINTENDENT'S UPDATE – Notification to HOAs

The purpose of this memorandum is to provide you with information regarding the plan and status thereof to notify the public of the increase in the Special Tax Rates for fiscal year 2015-16 through notification to applicable homeowners associations (HOA and HOAs). As directed by the Board on July 13th and clarified on July 27th, staff has formulated the following plan and has completed the following steps to complete such notification:

- Identification of HOAs within the Community Facilities District Boundaries. Simple website searches on both HOAs and HOA management firms within the CFDs have been completed. Contact and response from land developer regarding the same has been completed. We have reached out, but have not received a response from a title company and the chamber of commerce. The mailing will be sent to both HOAs and HOA management firms to reach as many recipients as possible. The current mailing list contains 5 HOA management firms which represent 17 HOAs. Our efforts will conclude the earlier of Wednesday, August 12th or when a response is received from the additional sources contacted.
- Letter to be Disseminated. The draft letter has been completed and is under review by department heads. The draft has been attached for your review and comment.

- Gaining an Understanding of the Use of the Information. Staff has been in contact with the largest management company, Walters Management, (which represents 11 HOAs) to discuss the pending mailing and how such information may be distributed. Walters Management suggested updating their website with a link to the District website for details This would allow the district to accomplish our goal without the cost of mailing.
- Update to District Website Data Regarding Special Taxes. Data on the special tax rates needs to be summarized and posted on the District website. This task has not begun but must be completed prior to mailing.
- Date of Mailing. The notification is proposed to be mailed on Friday, August 14th via first class regular mail. A copy of the notice will be mailed to the District office to provide confirmation that the mailing is complete.

KM:cz

Attachment: (1)



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Telephone: (619) 691-5550 FAX: (619) 425-3394

August __, 2015

Name if possible
Company / HOA
Address
City State Zip

RE: Sweetwater Union High School District – Notification of Special Tax Rates within
Community Facilities Districts

Beginning in 1986, the Sweetwater Union High School District has used Mello-Roos Community Facilities Districts (“CFDs”) to mitigate the impact of new development on school facilities. The new school facilities needed as a result of the impact from such development are funded through the levy of special taxes. These special taxes appear on the County of San Diego property tax bill and are due annually with the regular property taxes on or before December 10th and April 10th.

The school district currently has 18 CFDS which contain over 37,000 dwelling units. Some properties within the CFDs have paid the special tax for the full term and are no longer being levied a special tax. The CFDs are approximately 88% developed. The general location of each CFD is shown on the enclosed map. For a digital map, along with individual CFD boundary maps, please access the school district website at:

<http://fiscal.sweetwaterschools.org/cfd/>

The purpose of our correspondence is to communicate with the property owners via homeowner associations and homeowner association management companies the school facilities that have been funded through the CFDs and that the annual special tax rates for fiscal year 2015-16 were set by school district Board action on Monday, July 27th.

The Sweetwater Union High School District will fulfill the promise of 100% student success.

Sweetwater Union High School District programs and activities shall be free from discrimination based on gender, sex, race, color, religion, ancestry, national origin, ethnic group identification, marital or parental status, physical or mental disability, sexual orientation or the perception of one or more of such characteristics. SUHSD Board Policy 0410.

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Schools Funded by CFD Special Taxes:

To date, the CFDs have funded a portion of the following school facilities:

Eastlake High School
Rancho Del Rey Middle School
Otay Ranch High School
San Ysidro High School
Eastlake Middle School
Olympian High School
Middle School#12 (not yet completed)
High School#14 (not yet completed)
Easthills Academy

Annual Special Tax Rates Fiscal Year 2015-16:

On Monday, July 27th, the school district Board took action to set the annual special tax rates for fiscal year 2015-16. The base special tax rates were authorized to be increased by 2% over the previous fiscal year. Such increase will be reflected on the fiscal year 2015-16 property tax bill.

We encourage the dissemination of this information to the property owners and residents within each applicable HOA. As stated, information regarding the CFDs is available on the school district website.

If you need any additional information, please be in contact with our consultant, Barbara Hale-Carter, with Special District Financing & Administration at 760/233-2630.

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