

# Appendix O

Usual Sequence of Events for Mello-Roos Community Facilities Districts

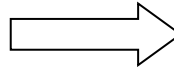
# USUAL SEQUENCE OF EVENTS FOR MELLO-ROOS COMMUNITY FACILITIES DISTRICTS

(Commencing with Section 53311 of the Government Code)

## PETITION INITIATED CFD

B  
E  
G  
I  
N

1. 10% Landowners
2. 10% Registered voters
3. Payment of pro-formation costs



## LEGISLATIVE BODY COMMENCES PROCEEDINGS

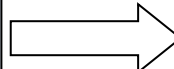
1. Adopt Goals and Policies
2. Adopt resolutions to:
  - a. Approve boundaries
  - b. Designate name of CFD
  - c. Identify types of facilities & services
  - d. Declare Intention to:
    - 1) Form CFD
    - 2) Levy special tax
    - 3) Issue bonds
  - e. Set time and place of public hearing
  - f. Establish voting procedures

## LOCAL AGENCY INITIATED CFD

Within 90 days

H  
E  
R  
E

1. Written request of 2 members of Legislative body, or
2. Majority approval of legislative body



## PUBLIC HEARING

May be continued up to 30 days or with finding up to 6 months

- If no majority protest, resolution adopted to form CFD\* by:
1. Establishing boundaries
  2. Determining necessity to incur bonded indebtedness
  3. Authorizing levy of special tax
  4. Approving types of facilities and services
  5. Setting election
- If more than 50% of registered voters (at least 6), or if the owners of more than 50% of the land area protest, then CFD abandoned for one year. If majority protest only against specific facilities, services or special tax, only that facility, service or tax must be dropped.

## Prepare Report

- Public hearing held not less than 30 days or not more than 60 days from adoption of Resolution of Intention
- REQUIRED – Publish notice (not later than 7 days before Public Hearing)  
OPTION – Mailed notice (not later than 15 days before Public Hearing)

\*Environmental review should be completed before formation of CFD



GENERAL ELECTION or SPECIAL ELECTION  
90/180 days from Resolution of Formation  
(unless time period shortened by 100% of electors)

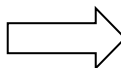
2/3 vote required

(if less than 12 registered voters

or if no tax on residential property - landowner election)

## ELECTION

- Voters consider:
1. Levy of Special Tax
  2. Establish appropriations limit
  3. Authorize issuance of bonds



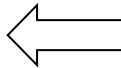
## ACTIONS BY LEGISLATIVE BODY

1. Certify election results
2. Enact ordinance to levy special tax
3. Authorize issuance of bonds
4. Approve Preliminary Official Statement and Continuing Disclosure Agreement



E  
N  
D

1. Sell and deliver bonds and receive bond proceeds
2. Initiate construction or acquisition
3. Commence activities to administer Debt, levy and collect special taxes and comply with continuing disclosure requirements



1. Record Notice of Special Tax Lien
2. Initiate validation proceedings, if necessary
3. 30 day statute of limitations