

## MERGER OR ESTABLISHMENT OF A SUBSIDIARY DISTRICT APPLICATION

*Submit the following items for merger OR establishment of a subsidiary district:*

1. Application for merger OR establishment of a subsidiary district.
2. A certified Resolution of Application from an affected district or city, OR a petition of landowners or registered voters making application (Government Code § 56760).
3. One copy of a metes-and-bounds legal description of the perimeter of the subject area.
4. One reproducible plat map with ten prints.
5. Two copies of a vicinity map showing the geographic location of the territory proposed for merger or establishment of a subsidiary district.
6. Environmental documentation: (submit documents from one category)

Initial Study: If no environmental review has been conducted, submit a completed Initial Study form available from the LAFCO office.

Categorical Exemption: If an agency has certified that the project qualifies for a categorical exemption from CEQA, please submit one copy of this finding.

Negative Declaration: If a Negative Declaration (ND) has been prepared, submit one copy of the ND with its certifying resolution and Initial Study.

Environmental Impact Report: If an Environmental Impact Report (EIR) has been prepared, submit 15 copies of the EIR with the certifying resolution. If applicable, only one copy of an appendix is required.

7. Copies of the district's current adopted budget and a three-year proposed budget containing details concerning expenditures and anticipated revenues for the city after the merger.
8. LAFCO processing fee (refer to fee schedule or contact LAFCO office).
9. Disclosure Statement (available from LAFCO office).

*Additional information may be requested during staff's review of the proposal.*

**San Diego Local Agency Formation Commission**  
**9335 Hazard Way, Suite 200**  
**San Diego, CA 92123**  
**(858) 614-7755**

**MERGER OR ESTABLISHMENT OF A SUBSIDIARY DISTRICT  
APPLICATION**

The information in this application is used by LAFCO staff to evaluate requests for a merger or establishment of a subsidiary district. Any proposal for merger will also consider an alternative proposal for establishment of a subsidiary district; any proposal for establishment of a subsidiary district will consider an alternative proposal for a merger (Government Code § 56118). Please respond to all items in this form, and indicate "NA" when an item does **NOT** apply.

Choose **one** of the following sentences:

Application is hereby made to merge the \_\_\_\_\_  
with the City of \_\_\_\_\_. (district name)

Application is hereby made to establish the \_\_\_\_\_  
as a subsidiary district of the City of \_\_\_\_\_. (district name)

As part of this application, the city of \_\_\_\_\_ or the \_\_\_\_\_ district,  
\_\_\_\_\_(the applicant), and the \_\_\_\_\_(real  
party in interest: subject landowner and/or registered voter) agree to defend, indemnify, hold harmless, and release the San Diego LAFCO, its agents, officers, attorneys, and employees from any claim, action, or proceeding brought against any or all of them, the purpose of which is to attack, set aside, void, or annul the approval or denial of this application or adoption of or refusal to adopt the environmental document which accompanies it or any other action San Diego LAFCO takes with respect to this application. This defense and indemnification obligation shall include, but not be limited to, attorneys' fees and other costs of defense, damages, costs, and expenses, including attorney fees payable to another party.

The person signing this application will be considered the proponent for the proposed action(s) and will receive all related notices and other communications. San Diego LAFCO's acceptance of this application is sufficient to make this agreement a binding, bilateral contract between us. I acknowledge that annexation to the city of \_\_\_\_\_ or the \_\_\_\_\_ district may result in the imposition of taxes, fees and assessments existing within the (city or district) on the effective date of annexation. I hereby waive any rights I may have under Articles XIIC and XIID of the State Constitution (Proposition 218) to a hearing, assessment ballot proceeding or an election on those existing taxes, fees and assessments.

Agreed:  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print/Type Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone#: \_\_\_\_\_

List the name and address of person(s) who also are to receive notices of these proceedings:

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_ Address: \_\_\_\_\_

\_\_\_\_\_

Phone#: \_\_\_\_\_ Phone: \_\_\_\_\_

**DESCRIPTION / JUSTIFICATION**

1. Explain why this proposal is being initiated.

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2. When was the district created and under what principal act? What service(s) did the district originally provide?

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3. What service(s) is/are currently being provided by the district?

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4. Describe how the district is governed. Include in your response the number of directors/commissioners, if they are elected or appointed, what body makes the appointment, if selection is by division, and specify the length of term of office.

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5. Does the city currently provide the same type of service(s) as the subject district?  YES  NO

6. Is the district's territory entirely contained within the city limits?  YES  NO

7. Are the councilmembers of the subject city elected by council district or at large?  District  At Large

8. Does the City Council plan to appoint an advisory board to advise them on matters pertaining to the services currently provided by the subject district?  YES  NO

9. Will there be any reductions or additions of either city or district personnel and/or services as a result of this proposal? If yes, indicate what those changes are anticipated to be (use additional pages if necessary).  YES  NO

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10. How many residents live within the subject district? \_\_\_\_\_  
 How many of these are registered voters? \_\_\_\_\_  
 How many residents live within the subject city? \_\_\_\_\_  
 How many of these are registered voters? \_\_\_\_\_  
 What is the source and date of your calculation? \_\_\_\_\_
10. Are there any jurisdictional issues associated with the proposed special district merger / subsidiary district establishment?  YES  NO  
 (If yes, please complete the LAFCO Policy L-107 form)

**LAND USE INFORMATION**

1. How many acres or square miles are included within the district? \_\_\_\_\_  
 How many acres or square miles are included within the city? \_\_\_\_\_
2. Describe the current prevalent land uses, and list the applicable General Plan(s) with the predominant General Plan designations in the area. \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
3. Describe the predominant uses of adjacent land (vacant, residential, etc.).  
 North: \_\_\_\_\_ East: \_\_\_\_\_  
 South: \_\_\_\_\_ West: \_\_\_\_\_
4. Is any changes in land use anticipated as a result of this proposal?  YES  NO  
 What other land uses or new development might occur?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
5. Describe the geographic location of the subject district in relation to the subject city as well as other cities, communities, freeways/highways, or major landmarks.  YES  NO  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## SPHERE OF INFLUENCE INFORMATION

1. Prior to establishment as a subsidiary district, will a “zero” sphere need to be designated for the subject district?  YES  NO
2. Will the city’s sphere need to be amended to include the district’s territory?  YES  NO

**FISCAL AND GENERAL INFORMATION:** For the questions in this section, please submit answers on additional pages, indicate who provided the information, and attach supplemental pages to this form.

1. Explain how district operations have been financed and include a breakdown of all sources of revenue. Use current fiscal year data in your response.
2. Describe any voter-approved charges or taxes that the district currently levies, and indicate if the city would continue to levy them after this change of organization.
3. Indicate if the city plans to establish an improvement district as a mechanism to continue the collection of fees and taxes in the subject district’s territory. If the proposed improvement district has different boundaries than the subject district, provide a map and legal description. If improvement districts or tax zones are proposed to be formed, explain the rationale used to determine the boundaries and associated benefit fees, taxes, or assessments.
4. If the city proposes to levy additional fees or taxes as a result of this proposal, indicate how those costs will be levied, and what the cost will be for each resident/service user.
5. Explain how this proposal would impact the city’s budget.
6. List any terms and conditions that you are requesting LAFCO to impose on this proposal.