

# California Voting Rights Act of 2001

Escondido Union School District  
Progress Report – July 14, 2011

## Level I Analysis

- ▶ Received June 23, 2011
- ▶ Depending upon residential concentrations, persons of Hispanic origin are sufficiently numerous that they could constitute a majority of eligible voters in a single trustee area.
- ▶ Recommendation: Explore feasibility of creating one or more single-member trustee areas in which Hispanic eligible voters could constitute a majority through the Level II analysis

# Process Overview

## SDCOE Census 2010 Collaborative Assessment Program

	Activity	Est. Completion
	Construction of database using 2010 Census data	✓
Level I	Initial legal review	✓
Level II	Review test trustee areas to identify voter concentrations	July 15, 2010
Level III	Legal review using residential overlay data	August 1, 2011
Level IV	Racially Polarized Voting Analysis	?
	<i>If change from at-large election system indicated:</i>	
Level V	Drawing trustee areas (addendum to contract required)	?



# Escondido Union School District

## Parcel Tax Overview

July 2011

## **What is a Parcel Tax?**

- **Special tax that applies uniformly to all affected parcels within the school district**
- **Unlike school bonds, parcel taxes may be used for operating expenses and are typically used to augment a district's general fund revenue**
- **Parcel tax rate is determined by the district**
- **May be structured to exempt
  - senior citizens and/or
  - persons receiving supplemental security income for a disabilityNeither exemption is legally required**
- **Typically implemented for a limited time, such as 4 – 8 years, depending on local tax tolerances and district financial needs**
- **Requires a 2/3 voter approval**

## **Procedural Issues:**

- Parcel tax measure can be placed on any general or special election ballot via board resolution
- Parcel tax elections may be called on any established election date
- Mailed ballot election is possible
- Upcoming scheduled election dates:
  - June 5, 2012 – Primary Election
  - November 6, 2012 –General Election
- Measure must be placed on ballot 88 days in advance of election date
- Recommended = additional 45-60 days for polling, 15-30 days for board action, plus time required for effective public information campaign

# Parcel Tax Analysis:

## Escondido Community Statistics:

- 45,387 parcels in Escondido Union School District\*
- 62,445 voters in Escondido Union School District\*
- 10% of population greater than age 65 (City of Escondido)\*\*
- Median household income \$56,259 (City of Escondido)\*\*
- Education Attainment: 29.5% or higher of county's population age 25 and older have college, graduate or masters degree (County of San Diego)\*\*

## Potential parcel tax proceeds under alternate tax rates:

Unitary Tax	45,387 Parcels minus 10% senior exemption and estimated 800 tax exempt parcels <i>Optimize required</i>	Annual Estimated Proceeds
\$20	40,048	\$ 800,960
\$50	40,048	\$ 2,002,400
\$75	40,048	\$ 3,003,600
\$100	40,048	\$ 4,004,800

\*County of San Diego, Assessor, 4/15/2010 Inventory of Parcels and Values – Gen. Elem. Escondido Union

\*\*Source: SANDAG 3/2011

\*\*\*California Postsecondary Education Commission

## Costs obtained for Various Southern California Districts Parcel Tax Measures

District	ADA	Consultant Cost	Election Cost	Total Cost	General or Special Election	Mail-in or Polls	Parcel Tax Rate/Term	Passed=66.7% </Failed
Santa Barbara Elem & High County: Santa Barbara	15987	\$59,639	\$ 98,815	\$158,454	2008 General	Polls	\$50/parcel --4 yrs	72.2%
La Canada USD County: Los Angeles	4109	\$69,000	\$ 80,000	\$149,000	2009 General	Polls	\$150/parcel-5 yrs	74.7%
Las Virgenes Unified County: Los Angeles	11803	\$15,000	\$120,000	\$135,000	2007 General w/Board Elections	Polls	\$98/parcel --8 yrs	78%
Patos Verdes Peninsula Unified County: Los Angeles	12000	---	---	\$150,000	2009 Special	Mail	\$165/parcel-4 yrs	68.9%
San Marino Unified Counties: Los Angeles/Orange	3199	\$28,000	\$ 60,000	\$ 98,000	2009 Special	Mail	\$795/parcel-- 6 yrs	71.2%
Santa Monica-Malibu Unified County: Los Angeles	11688	---	---	\$250,000	2008 Special	Mail	\$346/parcel -- no expiration	73%
South Pasadena County: Los Angeles	4258	\$10,000	\$ 50,000	\$ 60,000	2009 General	Polls	\$95/multi-unit parcel \$288/ parcel --4 yrs	67.3%
Fremont Union High County: Santa Clara	10333	---	Approx \$5/per voter - 38000 voters	\$190,000	Special 5/4/2010	Mail	\$98/parcel- 6 yrs	72.5%

## Costs obtained for Various Southern California Districts Parcel Tax Measures continued:

District	ADA	Consultant Cost	Election Cost	Total Cost	General or Special Election	Mail-in or Polls	Parcel Tax Rate/Term	Passed=66.7% Failed <=Failed
Culver City County: Los Angeles	6336	---	w/Board Election	\$ 75,000	General 11/2009	Polls	\$96/parcel-5yrs	74.9%
Long Beach County: Los Angeles	83287	---	---	\$300,000	General 11/2009	Polls	\$92/parcel-5yrs	Failed
Oxnard Elementary County: Ventura	15441	---	---	\$150,000	General 11/2009	Polls	\$99/parcel-4yrs	Failed
South Pasadena County: Los Angeles	4201	\$ 10,000	\$ 50,000	\$ 60,000	General 6/2009	Polls	\$288/parcel-4yrs	67.3%
Pasadena Unified County: Los Angeles	20526	---	---	\$530,000	Special 5/4/2010	Mail	\$120/parcel	Failed
La Canada Unified County: Los Angeles	4109	\$ 69,000	\$ 80,000	\$149,000	Special 6/2009	Mail	\$150/parcel-5yrs	74.7%
Rowland Unified County: Los Angeles	16920	\$103,237	\$166,554	\$269,791	Special 6/2009	Mail	\$120/parcel-5yrs	Failed
San Marino Unified County: Los Angeles	3199	\$ 28,000	\$ 60,000	\$ 98,000	Special 5/5/2009	Mail	\$795/parcel-6yrs	71.2%
Santa Monica-Malibu Unified County: Los Angeles	11688	---	---	\$360,000	Special 5/25/2010	Mail	\$198/parcel -5yrs	Failed
San Mateo Foster County: San Mateo	10660	\$ 46,410	\$143,000	\$189,410	Special 2/2010	Mail	\$75/parcel-7 yrs	67.0%

# California Parcel Tax Election Results - 2010

2010 California school parcel tax election results		
Status	Number	%
Approved	18	45%
Defeated	22	55%
<b>Totals:</b>	<b>40</b>	<b>100%</b>

## California School District Parcel Tax Elections --May 3, 2011

District	County	ADA	Consultant Cost	Election Cost	Total Cost	Mail-in or Polls	Parcel Tax Rate/Term	Passed
New Haven USD	Alameda* Median Household Income: \$68,258	12359	--	--	\$210,000	Mail	\$180/parcel 4 years	65.71% Failed
Pleasanton USD	Alameda* Median Household Income: \$68,258	14,353	--	--	\$360,000	Mail	\$98/parcel 4 years	65.16 % Failed
John Swett USD	Contra Costa* Median Household Income: \$75,084	1,603	\$25,000	\$9,013.12	\$ 34,013	Mail	\$60/parcel 4 years	59.25 % Failed
Lafayette SD	Contra Costa* Median Household Income: \$75,084	3,120	Pro-bono	\$117,278	\$117,278	Mail	\$176/parcel 4 years	74.31 %
Dixie USD	Marin* Median Household Income: \$86,658	1,741				Mail	\$107/parcel 8 years	80.19%
San Carlos ESD	San Mateo* Median Household Income: \$84,678	601				Mail	\$110.60/parcel 8 years	81.10%
Ravenswood City SD	San Mateo* Median Household Income: \$84,678	2,930				Mail	\$98/parcel 7 years	68.50%
Jefferson UHSD	San Mateo* Median Household Income: \$84,678	4,771				Mail	\$96/parcel 4 years	59.50% Failed

## California School District Parcel Tax Elections -May 3, 2011 continued:

District	County	ADA	Consultant Cost	Election Cost	Total Cost	Mail-in or Polls	Parcel Tax Rate/Term	Passed > 66.6%
Los Gatos-Saratoga Joint UHSD	Santa Clara* Median Household Income: \$84,990	3,058	\$25,000	\$115,000	\$140,000	Mail	\$49/parcel 6 years	71.80%
Sunnyvale SD	Santa Clara* Median Household Income: \$84,990	5,941	\$18,500	\$142,000	\$160,500	Mail	\$59/parcel 7 years	69.56 %
Cupertino Union SD	Santa Clara* Median Household Income: \$84,990	17,264	\$30,000	\$345,000	\$ 375,000	Mail	\$125/parcel 6 years	69.95 %
Los Altos ESD	Santa Clara* Median Household Income: \$84,990	4,152	\$18,500			Mail	\$193/parcel 6 years	67.34 %
Davis USD	Yolo* Median Household Income: \$56,120	8,169	---	---	\$125,000	Mail	\$200/parcel 2 years	67.20%

\*Education Attainment: 25% or higher of county's population age 25 and older have college, graduate or masters degree

NOTE: Too early for majority of districts to have a total cost

**Estimated Cost for a November General Election :**

Phase 1:	
-Polling research = <i>Godbe Research</i> :	\$ 29,765
-Feasibility Consultants = <i>TBWB Strategies</i> :	\$ 5,000
Phase 2:	
-Ballot Measure planning & Public Education Consultants	\$ 40,000
Phase 3:	
-Ballot = <i>Registrar of Voters</i> :	
•Election Estimate for a Seat	\$ 16,200
•Election Estimate for a Measure	\$ <u>23,700</u>
<b>Total estimated cost:</b>	<b>\$114,665</b>

Approximate Costs Based on November 2010 Election sharing costs of ballot with School Board election

## Estimated Cost - Special Vote by Mail Election :

Phase 1:	
-Polling research =Godbe Research:	\$ 29,765
-Feasibility Consultants =TBWB Strategies:	\$ 5,000
Phase 2:	
-Ballot Measure planning & Public Education Consultants	\$ 40,000
Phase 3:	
-Ballot = Registrar of Voters:	
•Cost per registered voter \$2.76	<u>\$172,000</u>
<b>Total estimated cost:</b>	<b>\$246,755</b>

**Estimated Cost - Special Polls Election :**

Phase 1:	
-Polling research =Godbe Research:	\$ 29,765
-Feasibility Consultants =TBWB Strategies:	\$ 5,000
Phase 2:	
-Ballot Measure planning & Public Education Consultants	\$ 40,000
Phase 3:	
-Ballot = Registrar of Voters:	
•Cost per registered voter \$8.36	<u>\$522,000</u>
<b>Total estimated cost:</b>	<b>\$596,765</b>



## **Parcel Tax Required Steps:**

- **Prepare cost estimates in order to achieve desired funding/revenue**
- **Classify parcels as taxable or tax exempt**
- **Conduct a survey to determine voter tax tolerance**
- **Review survey results and recommendations**
- **Prepare alternate analysis to incorporate recommendations; specifically recommendations regarding tax rates and exemption categories as applicable**
- **Conduct public hearing on proposed parcel tax measure**
- **Prepare required resolution for adoption by school district board**
- **Submit resolution to the county to call election**
- **Conduct election**
- **Upon successful election --commence levy of tax**



## **Parcel Tax Administration:**

- **Required accountability includes:**
  - identification of specific purpose(s) of special tax
  - ensure proceeds are applied appropriately
  - segregated account
  - annual report on collections, expenditures and projects funded by the tax
- **Oversight committee not mandated, but common**
- **Update parcel changes**
- **Monitor county remittances**
- **Monitor delinquencies**



## **Observations:**

- **Duration of the parcel tax doesn't seem to be a major issue**
- **Amount of the parcel tax is likely to become an issue above the \$500 threshold**
- **Voter participation in vote-by-mail elections seems to be high as compared to a stand-alone conventional election**
- **Easier to pass with high percentage of voters who are college educated and voters with higher-than-average family income**
- **Small enrollment --10,000 or under students-- is advantageous**



## Altogether 83 districts passed parcel taxes between 2001 and June 2009

The table below is a list of the 83 districts that passed parcel taxes between 2001 and June 2009. The typical district was located in the San Francisco Bay Area. The median district had about 3,180 students of whom 15% qualified for free/reduced-price meals and 9% were English learners.

District Name	County	2007-08 Enrollment	2007-08 % Free or Reduced-Price Meals	2007-08 % English Learners	Parcel Tax Rate and Term
Acalanes Union HSD	Contra Costa	5,905	1.1	1.3	\$189/parcel - 6 years
Alameda City Unified	Alameda	10,315	32.1	22.6	\$120/parcel - residential or \$0.15 sq. ft. - commercial/industrial - 4 yrs.
Albany City Unified	Alameda	3,810	22	18	\$250/parcel/\$.05 square foot nonresidential parcel - 7 years
Alum Rock Union SD	Santa Clara	13,841	90.3	56.4	\$100/parcel-5yrs adjusted for inflation
Bayshore ESD	San Mateo	445	69.9	20.7	\$96/parcel - 6 years
Belmont-Redwood Shores Elementary	San Mateo	2,616	4.5	5.5	\$78/parcel - 7 years
Berkeley Unified	Alameda	8,954	40	12.8	22.8 cents sq. ft. residential/ 34.4 cents sq. ft. commercial or industrial/ \$50 parcel unimproved parcels - 10 years
Berryessa Union Elementary	Santa Clara	8,297	32.4	36	\$79/parcel - 5 years
Bolinas-Stinson Union SD	Marin	110	0	7.3	\$250/parcel for 5 yrs
Brisbane ESD	San Mateo	589	26.1	11.7	\$96/parcel - 6 years
Burlingame SD	San Mateo	2,411	11.7	17.6	\$104/parcel-6yrs
Cambrian ESD	Santa Clara	3,075	19.8	9.8	\$63/parcel-4 yrs;
Campbell Union High	Santa Clara	7,838	15.3	4.8	\$85/parcel - 5 years
Cupertino Union SD	Santa Clara	17,294	4.7	11.8	\$125/parcel for 6 yrs
Davis Joint USD	Yolo	8,484	14.9	9.6	\$50 per dwelling for multidwelling and \$120/parcel - 3 years
Dixie SD	Marin	1,749	9.8	8.5	\$245/parcel-8yrs
Dublin Unified	Alameda	5,556	10.2	8.9	\$96/parcel - 5 years
Emery Unified	Alameda	815	80.4	13.5	\$.15 sq. ft./parcel improved property-10 yrs
Evergreen Elementary	Santa Clara	13,317	28.6	29.1	\$90/parcel - 5 years

Franklin-McKinley Elementary	Santa Clara	9,957	72.7	60.3	\$72/parcel - 9 years
Fremont Union HSD	Santa Clara	10,333	9.5	10.7	\$98/parcel-6yrs
Gravenstein Union ESD	Sonoma	508	18.3	7.9	\$36/parcel-8 yrs
Harmony Union ESD	Sonoma	834	7.8	1.7	\$52/parcel - 8 years
Kentfield Elementary	Marin	1,001	0	2.4	From \$773.94 to \$12,945/parcel-10 yrs with annual 5% COLA
Kenwood ESD	Sonoma	153	5.2	5.2	\$48/parcel-5 yrs
La Canada USD	Los Angeles	4,109	0.6	5.4	\$150/parcel for 5 yrs
La Honda-Pescadero Unified	San Mateo	372	53.2	47.3	\$100/parcel - 7 years
Lafayette Elementary	Contra Costa	3,178	2.2	2	\$313/parcel-7 yrs
Lagunitas ESD	Marin	266	17.3	1.9	\$197/parcel-8yrs;
Larkspur ESD	Marin	1,173	5.7	3.2	\$289/parcel - 6 years
Las Lomitas Elementary	San Mateo	1,136	2.3	9	\$115/parcel increase to existing \$196/parcel=\$311/parcel
Las Virgenes Unified	Los Angeles	11,803	3.3	5.2	\$98/parcel-8 yrs
Live Oak Elementary	Santa Cruz	2,194	41.4	28.8	\$84/parcel - 9 years.
Livermore Valley Joint Unified	Alameda	13,201	21.5	14.1	11.50 per month/parcel - 5 years
Los Altos Elementary SD	Santa Clara	4,270	2	7	\$333/parcel increase to existing \$264 tax =\$597/parcel
Los Gatos Union Elementary	Santa Clara	2,706	3.4	3.8	\$290/parcel- 6 years
Mammoth Unified	Mono	1,197	51.1	37.8	\$59/parcel-4 yrs
Martinez Unified	Contra Costa	4,077	20.7	7.4	\$50/parcel - 5 years
Menlo Park City ESD	San Mateo	2,326	4.2	7.8	\$97/parcel
Mill Valley Elementary	Marin	2,421	4	2.5	\$193/parcel - 4 years
Mojave USD	Kern	3,041	75.9	16.2	\$25.50/parcel for 5 yrs
Moraga SD	Contra Costa	1,735	0.7	2	\$325/parcel-6 yrs
Moreland ESD	Santa Clara	3,921	29.3	23.4	\$95/parcel for 8 yrs
Mountain View Whisman	Santa Clara	4,406	37.2	45.3	Tax per sq. footage: \$127/ 0-8,000 sq. ft; \$254/ 8,001-14,000 sq. ft; \$399/ 14,001- 22,000 sq. ft; \$508/ 22,001-28,000 sq. ft; \$677/ 28,001-44,000 sq. ft; \$1,016/ 44,000 and over sq. ft. - 8 years.
Nicasio	Marin	56	0	5.4	\$375/parcel - 8 yrs.
Novato USD	Marin	7,891	26.2	15	\$251/parcel for 6 yrs

Oak Grove ESD	Santa Clara	11,874	43	31.7	\$68/parcel for 4 yrs
Oak Park Unified	Ventura	3,714	2	2.3	\$197/parcel- 8 yrs.
Oakland Unified	Alameda	46,431	68.5	30	\$195/parcel
Orinda Union ESD	Contra Costa	2,446	0.4	1.1	\$124/parcel
Pacific Grove Unified	Monterey	1,676	11.9	4.5	\$35/parcel - 5 years
Pacifica School District	San Mateo	3,100	16.8	6.9	\$96/parcel- 5 yrs.
Palo Alto USD	Santa Clara	11,204	8.2	9.6	\$493/parcel - 6 years
Palos Verdes Peninsula Unified	Los Angeles	12,000	1.7	7.6	\$165/parcel for 4 yrs
Petaluma City ESD	Sonoma	2,271	33.4	28.1	\$75/parcel-4yrs
Petaluma Joint Union HSD	Sonoma	5,726	20.1	14.4	\$50/parcel-4 yrs
Piedmont City USD	Alameda	2,552	0.3	3.7	From \$1,200 per multifamily unit to \$3,065 for a lot over 20,000 sq. ft.; separate rates for commercial
Pittsburg Unified	Contra Costa	9,451	72.3	32.7	\$65/parcel - 7 years
Portola Valley ESD	San Mateo	706	0	3.5	\$290/parcel-10 yrs
Ravenswood City Elementary	San Mateo	4,936	79.2	60.7	\$98/parcel-5 yrs
Reed Union Elementary	Marin	1,104	0	2.3	\$319/parcel-8 yrs
Ross Elementary	Marin	374	0	0.8	\$626.98/parcel-8 yrs with annual 3% COLA
Ross Valley ESD	Marin	1,862	8.1	4.6	\$244.70/parcel - 8 years
San Carlos SD	San Mateo	2,877	3.5	4.7	\$78/parcel for 6 yrs
San Francisco Unified	San Francisco	55,069	53.8	29.5	\$198/parcel - 20 years - adjusted for inflation
San Marino Unified	Los Angeles	3,199	1	4.6	\$795/parcel for 6 yrs
San Mateo-Foster City SD	San Mateo	10,079	27.2	25.9	\$75/parcel-7yrs
San Ramon Valley Unified	Contra Costa	25,959	2	4.4	\$144/parcel for 7 yrs
Santa Barbara Elementary	Santa Barbara	5,640	60.5	47	\$27/parcel - 4 years
Santa Barbara High	Santa Barbara	10,196	35.3	17.9	\$23/parcel - 4 years
Santa Cruz City Elementary	Santa Cruz	2,136	40.3	27.5	\$105/parcel-9 yrs
Santa Cruz City High	Santa Cruz	4,847	25.7	9.4	\$28/parcel - 7 years
Santa Monica-Malibu Unified	Los Angeles	11,688	24.6	11.7	\$346/parcel
Sebastopol Union ESD	Sonoma	1,173	24.7	7.5	\$52/parcel - 8 years
Shoreline Unified	Marin	589	55	34.8	\$151.82/parcel - 6 years

South Pasadena	Los Angeles	4,258	8.3	6.9	\$95/multiunit parcel, \$288/parcel for 4 yrs
Tahoe-Truckee USD	Placer	4,090	30.5	23.7	\$98/parcel - 7 years
Tamalpais Union HSD	Marin	3,889	5.7	1.6	\$199.97/parcel-4yrs
Walnut Creek ESD	Contra Costa	3,125	7.6	8	\$82/parcel - 6 years
West Contra Costa Unified	Contra Costa	30,830	62.4	33.8	\$.072 per sq. ft. of total bldg area or \$7.20 per vacant parcel - 5 years
West Sonoma County UHSD	Sonoma	2,435	14.5	2.8	\$26/parcel - 8 years
Wilmar Union ESD	Sonoma	224	28.1	12.9	\$45/parcel-4 yrs
Woodside ESD	San Mateo	465	5.8	4.5	\$242/parcel for 8 yrs

DATA: THE ED-DATA PARTNERSHIP

EDSOURCE 9/09

District	County	ADA	Parcel Tax Rate and Term	Date	Yes Vote
Acalanes Union HSD	Contra Costa	5,460	\$112/parcel for 5 years	5/10	68.5%
Alum Rock Union Elementary	Santa Clara	12,886	Increase existing tax by \$48/parcel for a total of \$160.16/parcel - 5 years, inflation adjustment.	6/10	74.4%
Berkeley Unified	Alameda	8,387	6.31 cents/sq.ft. residential/9.46 cents/sq.ft. commercial and \$20 on unimproved parcels	11/10	80.9%
Burlingame Elementary	San Mateo	2,465	\$180/parcel for 10 years (renewal)	3/10	71.2%
Cabrillo Unified	San Mateo	3,207	\$150/parcel - 5 years	6/10	71.3%
Fremont Unified	Alameda	30,909	\$53/parcel - 5 years	11/10	70.1%
Fremont Union High	Santa Clara	9,916	Renew existing, expiring parcel tax at the same annual rate of \$98/parcel for 6 years	5/10	72.5%
Lakeside Joint School District	Santa Clara	82	\$311/parcel for 7 years	5/10	67.2%
Menlo Park City Elementary	San Mateo	2,340	\$178/parcel for 7 years, inflation adjustments	5/10	76.2%
Milpitas Unified	Santa Clara	9,386	\$84/parcel - 5 years	6/10	70.8%
Mt. Pleasant Elementary	Santa Clara	2,853	\$95/parcel - 5 years	6/10	71.4%
Oak Grove Elementary	Santa Clara	11,342	Gann Limit Extension for existing \$68/parcel tax for 4 years.	1/10	73.1%
Palo Alto Unified	Santa Clara	11,061	Increase existing parcel tax by \$96/parcel to \$589 for 6 years, with annual 2% increases.	5/10	79.4%
Portola Valley Elementary	San Mateo	709	\$168/parcel for 4 years	5/10	77.6%
San Francisco Unified	San Francisco	48,226	\$32.20/parcel single family residential and nonresidential, \$16.10/dwelling unit for mixed use and multifamily residential, adjusted for inflation. Renewal of existing parcel tax for a community facilities district, created under Mello-Roos in 1990.	6/10	70%
San Mateo-Foster City	San Mateo	10,008	Increase expiring parcel tax by \$96/parcel for 7 years, total \$180.85/parcel, inflation adjusted.	2/10	67%
Union Elementary	Santa Clara	4,430	\$96/parcel for 6 years	5/10	72.4%

DATA: EDSource

SCHOOL SERVICES OF CALIFORNIA, INC.

LEAGUE OF WOMEN VOTERS OF CALIFORNIA--SMART VOTER