

## SPECIAL ASSESSMENT CHECKLIST

PROJECT: \_\_\_\_\_ SEC. NO. \_\_\_\_\_

LOCATION: \_\_\_\_\_

### **PROCESS INITIATED:**

- \_\_\_\_\_ Citizen Contact
- \_\_\_\_\_ Clerk receives request to initiate SAD process
- \_\_\_\_\_ Clerk forwards request to Mayor
- \_\_\_\_\_ Mayor approves request and forwards to DPS
- \_\_\_\_\_ Preliminary project and estimate of cost are prepared, and public information meeting is scheduled [**DPS**]
- \_\_\_\_\_ Letter sent to property owners regarding meeting, including information on process, policies and project [**DPS** sends letter with copy to all departments involved in SAD process]

### **PUBLIC INFORMATION MEETING:**

- \_\_\_\_\_ Public information meeting held
- \_\_\_\_\_ Preliminary engineering report presented at information meeting:
  - Total project estimate: \$
  - Portion of project estimate to be assessed: \$
  - Number of parcels in the SAD:
  - Estimated base unit benefit: \$

### **PETITIONS:**

- \_\_\_\_\_ Petitions are requested by property owners
- \_\_\_\_\_ Petitions created by Assessing and provided by Clerk to requestor(s)
- \_\_\_\_\_ Petitions returned to Clerk by circulators
- \_\_\_\_\_ Petitions verified and report prepared by Assessing
- \_\_\_\_\_ Mailing to property owners advising when petitions will be on City Council agenda & opportunity to volunteer as resident advisor [**Assessing** prepares mailing labels and **Clerk** sends mailing]
- \_\_\_\_\_ Council resolution to accept petitions and to refer to Engineering for report (**RES A**) [**Clerk's Office**]
- \_\_\_\_\_ Council requests volunteers for resident advisors

### **ENGINEER'S REPORT:**

- \_\_\_\_\_ Recommendation is made on selection of PE consultant for project [**DPS**]
- \_\_\_\_\_ Mayor awards PE services contract to consultant
- \_\_\_\_\_ Second information meeting [**DPS** sends letter, cost estimates and CDBG information copy of letter to Mayor, Clerk and Treasurer]
- \_\_\_\_\_ Council receives Engineer's report with detailed cost estimate and plans
  - Total project estimate: \$
  - Portion of project estimate to be assessed: \$
  - Number of parcels in the SAD:
  - Estimated base unit benefit: \$
- \_\_\_\_\_ **Engineer's** report and plans filed with **Clerk**

\_\_\_\_\_ Council resolution to determine tentatively to proceed and to set public hearing on necessity (RES B) [Clerk's Office] prepares and Clerk certifies with copy provided to all departments involved in SAD process]

**PUBLIC HEARING ON NECESSITY:**

\_\_\_\_\_ Public Hearing notice prepared [Treasurer]. Attach CDBG letter from Fiscal Team  
\_\_\_\_\_ Public Hearing notice mailed to property owners [Clerk]  
\_\_\_\_\_ Public Hearing notice published in official newspaper [Clerk]  
\_\_\_\_\_ Public Hearing held by City Council  
\_\_\_\_\_ Council resolution to continue process with further action deferred 28 days (RES C) [Clerk's Office]

**PETITIONS OF OBJECTION:**

\_\_\_\_\_ Letter sent to all property owners regarding Petitions of Objection [Clerk]  
\_\_\_\_\_ Petitions prepared by Assessing and available to requestors from Clerk on the 14th day after public hearing  
\_\_\_\_\_ Petitions returned by circulators to Clerk by noon on the 28th day after public hearing

**AFTER 28-DAY DEFERRAL:**

\_\_\_\_\_ Petitions of Objection received: YES \_\_\_\_\_ NO  
\_\_\_\_\_ Verification Report prepared by Assessing  
\_\_\_\_\_ Signed by 50% or more: YES \_\_\_\_\_ NO  
\_\_\_\_\_ Returned to Council - accept Petitions of Objection (RES D-P) [Clerk's Office]  
\_\_\_\_\_ Council resolution to proceed with improvement, to establish a SAD and to authorize preparation of SAD roll (RES D) (RES D-O if override of Petitions of Objection) [Clerk's Office]

**SAD ROLL:**

\_\_\_\_\_ Construction bids are received [Clerk]  
\_\_\_\_\_ Final cost estimate and apportionment are prepared by DPS and sent to Assessing  
\_\_\_\_\_ Assessor proofs parcels and forwards apportionment to Treasury  
\_\_\_\_\_ Treasury inputs changes, prints roll and sends to Assessing  
\_\_\_\_\_ SAD Roll prepared by Director of Assessing  
\_\_\_\_\_ Roll filed with City Clerk  
\_\_\_\_\_ Roll presented to Council Liaison for forwarding to Council for review  
\_\_\_\_\_ Council resolution to accept roll, to order roll filed with Clerk for public examination, and to set a public hearing (RES E) [Clerk's Office]  
\_\_\_\_\_ RES E is certified and filed with City Clerk

**PUBLIC HEARING ON SAD ROLL:**

\_\_\_\_\_ Public Hearing notice prepared [Treasurer]. Mail CDBG application from Fiscal Team.  
\_\_\_\_\_ Public Hearing notice and CDBG information mailed to property owners [Clerk]  
\_\_\_\_\_ Public Hearing notice published in official newspaper [Clerk]  
\_\_\_\_\_ Public Hearing held by City Council

\_\_\_\_\_ Council resolution to confirm SAD roll and to command that special assessments  
be spread (RES F) [Clerk's Office]  
\_\_\_\_\_ City Council awards bid for construction  
\_\_\_\_\_ City Council awards contract for CE services to consultant  
\_\_\_\_\_ File liens with county [Treasurer]  
\_\_\_\_\_ Mail notice of confirmation to property owners [Treasurer]

**CERTIFICATION OF SAD ROLL:**

\_\_\_\_\_ Final roll prepared and certified by Director of Assessing

**BILL AND COLLECT:**

\_\_\_\_\_ Council resolution to bill and collect, setting of interest rate and setting of date  
interest begins (RES G) [Clerk's Office] prepares with Treasurer providing  
recommendation on interest rate and date interest is to begin]  
\_\_\_\_\_ Mail bill and collect notification and amortization schedules to property owners  
[Treasurer]  
\_\_\_\_\_ Provide copy of amortization loan to Accounting [Treasurer]

**CONSTRUCTION:**

\_\_\_\_\_ Construction started  
\_\_\_\_\_ Construction completed

**FINAL ACCOUNTING FOR SAD**

\_\_\_\_\_ Report on final accounting and allocation of costs [DPS]  
\_\_\_\_\_ Adjustments to assessments [Treasurer]

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