

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 C) [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 D) [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 E-P) [Mayor's Office]
_____ Council resolution to proceed with improvement, to establish a SAD and to authorize preparation of SAD roll (RES E) (RES E-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 Liasion 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 F) [Clerk's Office]
_____ RES F 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 G) [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 H) [Mayor'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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