

SPECIAL ASSESSMENT CHECKLIST

PROJECT: _____ SEC. NO. _____

LOCATION: _____

PROCESS INITIATED:

_____ Call for Projects Occurs – September thru October

_____ City is provided with written documentation stating that at least 60% of street requests that a public information meeting is scheduled

_____ 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

FIRST PUBLIC INFORMATION MEETING:

_____ Public information meeting held to review the SAD Policy and determine resident volunteers that will obtain petition signatures

PETITIONS:

_____ Petition template created by Treasury and provided to Clerks Department

_____ Clerks Department provides petition template to resident volunteers

_____ Petitions returned to Clerk by circulators - November thru January

_____ Petitions verified and report prepared by Assessing

_____ Mailing to property owners advising when petitions will be on City Council agenda [Assessing prepares mailing labels and Clerk sends mailing]

_____ Council resolution to accept petitions (RES A)

CAPITAL IMPROVEMENT PROJECT:

_____ The DPS will prepare a CIP project entry for inclusion with the next

BUDGET INCORPORATION OF QUALIFYING PROJECTS:

_____ City Council determines which SAD projects will be included for engineering design in the next fiscal year.

APPROVAL TO PROCEED WITH THE PRELIMINARY ENGINEERING PHASE:

_____ Recommendation is made on selection of PE consultant for project [DPS]

_____ City Council awards PE services contract to consultant

_____ City Council directs DPS to commence preparation of the City Engineer’s Report

SECOND PUBLIC INFORMATION MEETING:

_____ Second public information meeting is held in May

COUNCIL RECEIVES THE CITY ENGINEER’S REPORT AND DETERMINES TO TENTATIVELY PROCEED:

_____ 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 in July

_____ 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% + 1 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**); planned for an August Council meeting

_____ Council agrees to budget the construction and construction engineering phases for the next fiscal year budget; planned for an August or September Council meeting

DRAFT SAD ROLL:

_____ Draft SAD Roll prepared by Director of Assessing
_____ Draft SAD Roll filed with City Clerk
_____ Draft SAD Roll submitted to City Council at a September meeting
_____ 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; planned for an October meeting
_____ Council resolution to confirm SAD roll and to command that special assessments
be spread (**RES F**) [**Clerk's Office**]

CERTIFICATION OF SAD ROLL:

_____ Final roll prepared and certified by Director of **Assessing**
_____ Assessor proofs parcels and forwards apportionment to Treasury
_____ Treasury inputs changes, prints roll and sends to 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**]
_____ Mail notice of confirmation to property owners [**Treasurer**]
_____ Provide copy of amortization loan to Accounting [**Treasurer**]

PROCEED TO CONSTRUCT IMPROVEMENT:

_____ DPS and Fiscal coordinate to advertise and bid the SAD project
_____ City Council awards bid for construction
_____ City Council awards contract for CE services to consultant
_____ File liens with county [**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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