
GENERAL PLANNING CONSULTANT:
TECHNICAL MANUAL 88.4.1
NOTES AND DIRECTIONS FOR PREPARING NOTICES
FOR CORRECTING BENEFIT ASSESSMENTS AND
CLOSING APPEALS CASE FILES

Prepared for:
Southern California Rapid Transit District

Prepared By:
Schimpeler Corradino Associates
Myra L. Frank & Associates

in association with

Cordoba Corporation
Manuel Padron & Associates
The Planning Group, Inc.

June, 1988

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NOTE TO USERS

All forms and letters have been developed to comply and coordinate with the administrative requirements of the various outside agencies and the SCRTD Departments involved in the Metro Rail MOS-1 Benefit Assessment Districts. Thus, they may need revision through the annual cycle or as agency policies and procedures change.

Accordingly, it is prudent to review forms and letters periodically when in continual use or prior to reactivation when use has been suspended for some period of time.

OVERVIEW FLOW CHART

The SCRTD Board of Directors considers Benefit Assessment items such as reduction of Benefit Assessments, appointment of hearing officers, etc.



- o Obtain an original copy of the Board Report and any attachments, Box Items or other copy relevant to the Benefit Assessment program from the District Secretary's Office. (see BOARD REPORT AND RESOLUTIONS, Section A)



- o If agreement is included in Board Report, Appeals Case file reviewed for completeness of documentation supporting staff recommendation (see CASE FILES, Planner's Checklist)



SCRTD Board of Directors approve Board Report



- o Request by memo, original signed (certified) copies of Benefit Assessment Resolutions with seal from Board Secretary's Office, ask to be called to arrange pick-up when they are ready (see BOARD REPORTS and RESOLUTIONS, Section B)



- o Pickup case files (as indicated on Board Report) for processing (see CASE FILES)



- o Prepare notice to AUDITOR-CONTROLLER'S OFFICE, announcing change in the direct assessment fee (see Auditor-Controller Notification, Section A)

Notice to Auditor-Controller's Office is returned with signature from the General Manager



- o Process notice to Auditor-Controller to revise assessment (see AUDITOR-CONTROLLER NOTIFICATION, Section B)



- o Send notice to Property Owner of Board action (see PROPERTY OWNER NOTIFICATION)



- o Revise Benefit Assessment Computerized data base (see CALCULATION OF REVISED ASSESSMENT)



- o Revise Benefit Assessment hard copy data base (see DATA BASE MANUALS)



Noticing of Appropriate Agencies and Individuals and Data Base Revisions completed



- o Complete subject file for Board Meeting (see APPEALS CHANGE SUBJECT FILE)



- o Review case file (see CASE FILES, INDIVIDUAL CASE FILE REVIEW CHECK LIST)

BOARD REPORTS AND RESOLUTIONS

- A. On the day before the SCRTD Board meeting, obtain an original copy of Benefit Assessment related Board Reports from the District Secretary's Office located on the second floor (see Exhibit 1, pages 3 and 4).
1. If the Board report is a box item or NOT a decision on an appeals case the original report is filed in the subject file and one copy is placed in the Board Report Notebook.
 2. If the Board takes action on an appeals case, the report (see Exhibit 2, pages 5 and 6) will contain the following:
 - o Memo from General Manager to the Board with background information
 - o An unsigned copy of the resolution (see Exhibit 4, page 9; signed version follows later as Exhibit 7, page 15)
 - o Agreement between SCRTD and petitioner
- Xerox copies of the Board Report and distribute as follows:
- a. Board Report Notebook: The original Board Report in the Board Report Notebook with copies of the Agreements and certified resolutions. Update the Table of Contents and include the changed page
 - b. Case file: A copy of the Board Report cover memo, original of agreement and certified resolution for each of the case files acted upon by the SCRTD Board. Discard any previous unsigned copies of the board report and keep the most up to date board actions in the file
 - c. Hold a copy of the Board report for noticing procedures, xeroxing, etc.
- B. Board of Directors Resolution on any appeals action is available on or after the date of the board meeting.
1. Submit a memo (see Exhibit 5, page 12) listing resolutions needed to the District Secretary's Office to obtain two original signed and sealed resolutions (see Exhibit 6, page 13) and handle as follows:
 - a. Have resolutions signed by the District Secretary (see RESOLUTION AND AGREEMENT SIGNING PROCEDURES, page 11)
 - b. Distribute copies of Resolutions as follows:
 - o Case file: one original
 - o Make one copy for processing
 - o Board Report notebook: one original
 - c. Use Board Report Checklist to review process (see page 2)

BOARD REPORT CHECKLIST

- O BOARD REPORT FOR CONSIDERATION OF ACTION ON APPEALS CASE
 - o Place original Board Report with copies of Agreements and originals of resolutions in Board Report Notebook of the Benefit Assessment Office (see Exhibits 3 and 4, pages 7 and 9)
 - o Hold one copy of the Board Report originals for resolutions for preparing notices and correcting Benefit Assessments and closing appeals case files
 - o Xerox copies of the Board Report and insert one copy into each file for cases considered by the Board
 - Include an original signed Agreement attached to the Board Report and unsigned copy of the Resolution for each particular case
 - Discard any unsigned copy(ies) of the Agreement and extra copy(ies) of the Resolution already in the case file
- O OTHER BOARD REPORTS OR BOX ITEM REPORTS
 - o Place the original Board Report or other report in Board Report Notebook
 - o Make one copy of Report for subject file
- O ALL REPORTS RELATED TO BENEFIT ASSESSMENT
 - o Update and reprint the Table of Contents
 - o Replace Table of Contents with revised version in Board Report Notebook
- O SIGNED RESOLUTIONS
 - o Obtain two sets of each Resolution with signature and seal with each Agreement
 - o Obtain signatures (see RESOLUTION AND AGREEMENT SIGNING PROCEDURES, page 11)
 - o Place one original in District's Notebook
 - o Insert one original into each file for cases considered by the Board

EXHIBIT 1

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

1988

SCHEDULE OF MEETINGS/CONFERENCES INVOLVING BOARD OF DIRECTORS

(All Board and Committee of the Whole meetings scheduled for
1:00 P.M. unless noted)

Thurs., January 7	Committee of the Whole
Thurs., January 14	Board
Jan. 24-28	APTA Management Conference Fort Lauderdale, FL Marriott Hotel
# Thurs., January 28	Board
Thurs., February 4	Committee of the Whole
Thurs., February 11	Board
Thurs., February 25	Board
Thurs., March 3	Committee of the Whole
Thurs., March 10	Board
March 13-15	APTA Legislative Conference Washington, D.C. J. W. Marriott Hotel
Thurs., March 24	Board
Thurs., April 7	Committee of the Whole
Thurs., April 14	Board
April 15-20	APTA Western Conference Monterey, CA Doubletree Hotel
Thurs., April 28	Board
Thurs., May 5	Committee of the Whole
\$ Thurs., May 12	Board
May 12 & 13	California Transit Assn. Spring Meeting Hyatt Regency, Sacramento
May 14-19	APTA Eastern Conference St. Louis, MO Omni Hotel
Thurs., May 26	Board

DATEEVENT

Thurs., June 2	Committee of the Whole
June 5-9	APTA Rapid Transit Conference
	Buffalo, NY
	Hyatt Hotel
# Thurs., June 9	Board
Thurs., June 23	Board
Thurs., July 7	Committee of the Whole
Thurs., July 14	Board
Thurs., July 28	Board
Thurs., August 4	Committee of the Whole
Thurs., August 11	Board
Thurs., August 25	Board
Thurs., September 1	Committee of the Whole
Thurs., September 8	Board
Thurs., September 22	Board
October 2-6	APTA Annual Meeting
	Montreal, Canada
	Queen Elizabeth Hotel
# Thurs., October 6	Committee of the Whole
Thurs., October 13	Board
Thurs., October 27	Board
Thurs., November 3	Committee of the Whole
Thurs., November 10	Board
* Fri., November 25	Board
Dec. 1 & 2	California Transit Assn.
	Annual Meeting
	Anaheim Hilton, Anaheim
\$ Thurs., December 1	Committee of the Whole
Thurs., December 8	Board
Thurs., December 22	Board

- * - Change of date due to Holiday
- # - Possible change of date due to APTA meeting
- \$ - Possible change of date

District Secretary's Office
Date: December 3, 1987

EXHIBIT 2



Alan F. Pegg
Interim General Manager

February 16, 1988

TO: Board of Directors

FROM: Alan F. Pegg

SUBJECT: CONSIDER THE GENERAL MANAGER'S REPORT FOR APPROVAL OF AGREEMENTS BETWEEN PETITIONERS AND THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT AND ADOPTION OF RESOLUTIONS ORDERING CHANGE IN BENEFIT ASSESSMENT RECOMMENDATION

RECOMMENDATION

It is recommended that the Board approve the attached agreements and adopt the proposed resolutions to reduce the assessments on properties covered by the following appeals cases:

<u>APPEALS CASE NO.</u>	<u>PARCEL NO.</u>	<u>BASIS OF APPEAL</u>
A1-99-86	5149-009-002	Vacant due to Code
A1-121-86	5143-022-013	Vacant due to Code
A1-122-86	5149-025-008	Incorrect Calculation, Residential Use
A1-299-86	5173-015-014	Exempt/Non Exempt Uses
A1-300-86	5173-015-012	Exempt/Non Exempt Uses
A1-301-86	5173-015-013	Exempt/Non Exempt Uses
A1-302-86	5173-015-008	Exempt/Non Exempt Uses
A1-303-86	5173-015-009	Exempt/Non Exempt Uses
A1-304-86	5173-015-015	Exempt/Non Exempt Uses
A1-326-86	5143-021-013	Residential Use
A1-330-86	5143-027-012	Incorrect Calculation
A1-659-86	5144-004-012	Incorrect Calculation

BACKGROUND

In accordance with the assessment appeals procedures adopted by the Board of Directors, the staff has reviewed the petitions and discussed the basis for appeal with the Petitioners.

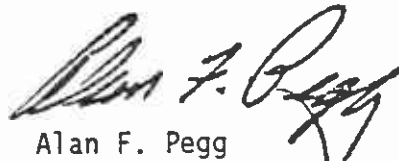
The evidence required to support the claim for reduction of assessment has been received from each Petitioner and has been reviewed carefully by the staff. In each case the evidence is sufficient to support a recommendation of reduction of the assessment. Since one improvement crosses property lines for Cases A1-302, 303, 304-86, these cases have been combined under one resolution and agreement.

Board of Directors
February 16, 1988
Page Two


As indicated in the attached agreements, the Petitioners have reviewed the proposed agreements and concur with the findings of the staff and agree to the revised assessments. In order for an assessment to be changed for a particular Petitioner, the attached resolution for that Petitioner must be adopted by a two-thirds vote.

Passage of a resolution by a two-thirds vote would constitute Board acceptance of the agreement and would meet the requirements of Section 33001.5(e) of the Public Utilities Code which allows the Board to change an assessment.

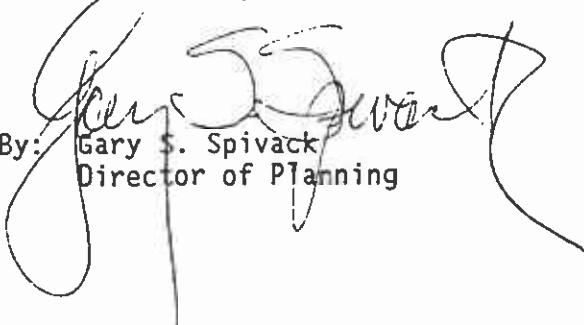
Respectfully,



Alan F. Pegg



By: Albert H. Perdon
Assistant General Manager
of Planning and Communications



By: Gary S. Spivack
Director of Planning

Attachments

EXHIBIT 3

AGREEMENT BETWEEN THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT
AND LOS ANGELES OFFICE ASSOCIATES I, LTD.,
OWNER OF PARCEL 5144-004-012, REGARDING BENEFIT ASSESSMENT
APPEALS CASE NUMBER A1-659-86

On June 22, 1987, Timothy J. Sweeney (Representative) filed a petition on behalf of Los Angeles Office Associates I, Ltd. (Petitioner) with the Board of Directors of the Southern California Rapid Transit District (SCRTD) requesting reduction in the SCRTD assessment for the property located at 530 West Sixth Street and identified by Parcel Number 5144-004-012 (the Property) on the grounds that the assessment was incorrectly calculated.

On January 8, 1988, a staff conference was held with representatives of the SCRTD and the Petitioner's designated representative. To resolve the issues raised in the Petitioner's claim, the Petitioner and the SCRTD do agree as follows:

1. Square footages used to calculate the original 1986 assessment for the Property were as follows:

Office	204,898 square feet
Parcel	16,422 square feet

Based upon these square footages, the original SCRTD assessment for the Property was calculated to be \$61,469. This assessment was based upon the square footage of a fifteen storied improvement, which was greater than the square footage of the assessable parcel.

2. The Representative alleged that the District incorrectly calculated the square footage of the improvement. The evidence submitted by the Representative to support his contention was building floor plans of the floors in question and an architect's report.

Field inspections were conducted on January 5 and 7, 1988, by a representative of SCRTD to verify that the floors corresponded to the floor plans submitted.

3. The evidence verifies the Petitioner's contention that the improvement square footage used for the original calculation of the assessment for the Property is incorrect. The use of actual building plans allowed for more accurate dimensions of improvement square footage. The evidence submitted by the Petitioner, and verified by the District, demonstrates that the gross square footage of improvement is 191,865 square feet. A review of the improvement square footage was conducted in conformance with the methodology outlined in HOW TO CALCULATE METRO RAIL BENEFIT ASSESSMENTS, October 1986. The square footages for purposes of revising the SCRTD assessment for the Property are as follows.

Office 191,865 square feet
Parcel 16,422 square feet

Based upon the 191,865 square feet of assessable improvements and in conformance with the Resolution Creating Special Benefit Assessment District A1 and A2 for the MOS-1 Segment of the Metro Rail System adopted by the SCRTD Board of Directors on July 11, 1985, and Procedures for Appealing Southern California Rapid Transit District Benefit Assessments, as Amended, the revised SCRTD assessment for Property 5144-004-012 is \$57,560.

4. The assessment based on 191,865 square feet of improvement will remain valid until the use or square footage of the property changes.
5. The Petitioner, by executing this agreement, agrees to an assessment for Property 5144-004-012 of \$57,560 based on 191,865 square feet of assessable improvement. Execution of this agreement by the Petitioner and approval by the SCRTD Board of Directors constitutes a complete and final settlement of all issues raised in the Petitioner's claim of June 22, 1987.

For the Petitioner,
LOS ANGELES OFFICE ASSOCIATES I, LTD.

For the SCRTD:

Timothy J. Sweeney
REPRESENTATIVE

John A. Dyer
GENERAL MANAGER

Date: _____

Date: _____

Approved as to form:

Charles M. Safer
ASSISTANT COUNSEL

Date: _____

EXHIBIT 4

BA9bRev.1

RESOLUTION OF THE BOARD OF DIRECTORS
OF THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT,
IN THE CASE OF BENEFIT ASSESSMENT APPEALS
PETITION NUMBER

WHEREAS, the California State Legislature has enacted Sections 33000, et seq., of the California Public Utilities Code (the "Code") enabling the Southern California Rapid Transit District ("District") to create special benefit assessment districts in the vicinity of proposed stations for the Metro Rail system and to levy special benefit assessments therein in order to finance a portion of the cost of the Metro Rail system provided certain procedural requirements are met; and

WHEREAS, Section 33000.5(e) of the Code permits the Board, by resolution adopted by a two-thirds vote, to provide for changes in an assessment to particular real property arising out of changes in the parcel or floor area of that real property; and

WHEREAS, in accordance with adopted procedures, (the "Petitioner"), owner of real property identified by parcel number (the "Property"), did file, on , with this Board a Benefit Assessment Appeals Petition, identified by Case Number , which requested the reduction of the assessment for the Property on the grounds that the Property ; and

WHEREAS, on _____, a staff conference was held between the Petitioner and representatives of the District in which issues raised by the Petitioner were resolved to the satisfaction of both parties, and the evidence produced demonstrates that the number of assessable square feet for the Property should be changed;

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Southern California Rapid Transit District:

1. The Agreement Between the Southern California Rapid Transit District and, _____, owner of parcel number _____, regarding Benefit Assessment Appeals Case Number _____, attached hereto, is hereby approved.

2. The SCRTD District Assessment for parcel number _____ is hereby changed to _____ based upon assessable square footage of _____ square feet.

CERTIFICATION

The undersigned, duly qualified and acting as District Secretary of the Southern California Rapid Transit District, certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Board of Directors of the Southern California Rapid Transit District held on _____.

District Secretary

Dated:

(SEAL)

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RESOLUTION AND AGREEMENT SIGNING PROCEDURES

- A. Once the Resolution and Agreement have been prepared by the District Secretary's Office they must be picked up and then taken for signature. The Agreement needs to be signed by the General Manager and the Resolution needs to be signed by the District Secretary (see Exhibits 6 and 7, pages 13 and 15).

To obtain the General Manager's signature:

- a. Put Resolutions from a single Board Meeting all in one file folder; ie. (all documents in the same folder)
- b. Attach a routing slip to the General Manager, stating that the documents need his signature. On the slip include your name and extension so that you can be called when they are ready for pick up
- c. Take them up to the 6th Floor, the General Manager's office
- d. Pick up the documents when they are ready

- B. After you pick up the documents with the General Manager's signature, the resolutions must then be signed by the District Secretary.

To obtain the District Secretary's signature

- a. Leave all documents in the same folder
- b. Attach a memo and give to any one of the secretaries in the District Secretary's Office stating that you need the District Secretary's signature, include your name and extension so that they may call you for pick up
- c. Take them to the 2nd Floor, District Secretary's Office
- d. Pick up the documents when they are ready

EXHIBIT 5

SAMPLE MEMO

OCPM-4
REV 7/85

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

Dec 11, 1987

MEMO TO Donna

IN RE: Board Report Needed:

from December 10, 1987 Board Meeting

I need a signed and sealed copy of the Board Resolution and agreement for Case #s A1-120-86 & A1-345-86. Could you prepare these for me please, and call me when they are ready for pick up. Thank you

Marriette x3267

I will bring them back for Ms. Bolens signature once I have obtained Mr. Jegg's signature.

EXHIBIT 6

AGREEMENT BETWEEN THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT
AND LOS ANGELES OFFICE ASSOCIATES I, LTD.,
OWNER OF PARCEL 5144-004-012, REGARDING BENEFIT ASSESSMENT
APPEALS CASE NUMBER A1-659-86

On June 22, 1987, Timothy J. Sweeney (Representative) filed a petition on behalf of Los Angeles Office Associates I, Ltd. (Petitioner) with the Board of Directors of the Southern California Rapid Transit District (SCR TD) requesting reduction in the SCR TD assessment for the property located at 530 West Sixth Street and identified by Parcel Number 5144-004-012 (the Property) on the grounds that the assessment was incorrectly calculated.

On January 8, 1988, a staff conference was held with representatives of the SCR TD and the Petitioner's designated representative. To resolve the issues raised in the Petitioner's claim, the Petitioner and the SCR TD do agree as follows:

1. Square footages used to calculate the original 1986 assessment for the Property were as follows:

Office	204,898 square feet
--------	---------------------

Parcel	16,422 square feet
--------	--------------------

Based upon these square footages, the original SCR TD assessment for the Property was calculated to be \$61,469. This assessment was based upon the square footage of a fifteen storied improvement, which was greater than the square footage of the assessable parcel.

2. The Representative alleged that the District incorrectly calculated the square footage of the improvement. The evidence submitted by the Representative to support his contention was building floor plans of the floors in question and an architect's report.

Field inspections were conducted on January 5 and 7, 1988, by a representative of SCR TD to verify that the floors corresponded to the floor plans submitted.

3. The evidence verifies the Petitioner's contention that the improvement square footage used for the original calculation of the assessment for the Property is incorrect. The use of actual building plans allowed for more accurate dimensions of improvement square footage. The evidence submitted by the Petitioner, and verified by the District, demonstrates that the gross square footage of improvement is 191,865 square feet. A review of the improvement square footage was conducted in conformance with the methodology outlined in HOW TO CALCULATE METRO RAIL BENEFIT ASSESSMENTS, October 1986. The square footages for purposes of revising the SCR TD assessment for the Property are as follows.

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Office 191,865 square feet
Parcel 16,422 square feet

Based upon the 191,865 square feet of assessable improvements and in conformance with the Resolution Creating Special Benefit Assessment District A1 and A2 for the MOS-1 Segment of the Metro Rail System adopted by the SCRTD Board of Directors on July 11, 1985, and Procedures for Appealing Southern California Rapid Transit District Benefit Assessments, as Amended, the revised SCRTD assessment for Property 5144-004-012 is \$57,560.

4. The assessment based on 191,865 square feet of improvement will remain valid until the use or square footage of the property changes.
5. The Petitioner, by executing this agreement, agrees to an assessment for Property 5144-004-012 of \$57,560 based on 191,865 square feet of assessable improvement. Execution of this agreement by the Petitioner and approval by the SCRTD Board of Directors constitutes a complete and final settlement of all issues raised in the Petitioner's claim of June 22, 1987.

For the Petitioner,
LOS ANGELES OFFICE ASSOCIATES I, LTD.


Timothy D. Sweeney
REPRESENTATIVE

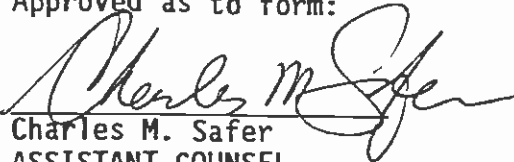
Date: 2/5/88

For the SCRTD:


Alan F. Pegg
INTERIM GENERAL MANAGER

Date: 3-2-88

Approved as to form:


Charles M. Safer
ASSISTANT COUNSEL

Date: 2-11-88

EXHIBIT 7

BA9bRev.1

RESOLUTION OF THE BOARD OF DIRECTORS
OF THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT,
IN THE CASE OF BENEFIT ASSESSMENT APPEALS
PETITION NUMBER
A1-659-86

WHEREAS, the California State Legislature has enacted Sections 33000, et seq., of the California Public Utilities Code (the "Code") enabling the Southern California Rapid Transit District ("District") to create special benefit assessment districts in the vicinity of proposed stations for the Metro Rail system and to levy special benefit assessments therein in order to finance a portion of the cost of the Metro Rail system provided certain procedural requirements are met; and

WHEREAS, Section 33000.5(e) of the Code permits the Board, by resolution adopted by a two-thirds vote, to provide for changes in an assessment to particular real property arising out of changes in the parcel or floor area of that real property; and

WHEREAS, in accordance with adopted procedures, L.A. Office Associates I, LTD (the "Petitioner"), owner of real property identified by parcel number 5144-004-012(the "Property"), did file, on June 22, 1988 , with this Board a Benefit Assessment Appeals Petition, identified by Case Number A1-659-86, which requested the reduction of the assessment for the Property on the grounds that the Property was incorrectly calculated; and

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WHEREAS, on January 8, 1988, a staff conference was held between the Petitioner and representatives of the District in which issues raised by the Petitioner were resolved to the satisfaction of both parties, and the evidence produced demonstrates that the number of assessable square feet for the Property should be changed;

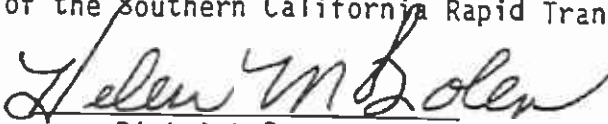
NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Southern California Rapid Transit District:

1. The Agreement Between the Southern California Rapid Transit District and, Associates I, LTD, owner of parcel number 5144-004-012, regarding Benefit Assessment Appeals Case Number AI-659-86, attached hereto, is hereby approved.

2. The SCRTD District Assessment for parcel number 5144-004-012 is hereby changed to 57,560 based upon assessable square footage of 191,865 square feet.

CERTIFICATION

The undersigned, duly qualified and acting as District Secretary of the Southern California Rapid Transit District, certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Board of Directors of the Southern California Rapid Transit District held on February 25, 1988.


District Secretary

Dated: February 26, 1988.

(SEAL)

CASE FILES

- A. After SCRTD Board Action on Benefit Assessment Appeals cases, the individual case file is reviewed.
 - o Pull all case files dealt with at the Board meeting (use Board Report as a reference)
 - o The planner should have put the file in order by this time (see Planner's Checklist For Closing Case, page 18)
 - o Check parcel number for consistency throughout the file, e.g., Stipulations, Appeals Form, Correspondence, Joint Consolidated Tax Bill
- B. After entire process for correcting Benefit Assessments has been completed, review each individual case file for proper documentation (see INDIVIDUAL CASE FILE REVIEW, page 19).
- C. Prepare Appeals data base update sheet, update the appeals data base and file the update sheet (See Exhibit 8, page 20).
- D. Prepare Calculation of Revised Assessment form and process for updating Benefit Assessment data base (see Exhibit 11, page 26).

PLANNER'S CHECKLIST FOR CLOSING CASE

- Appeals Petition Complete
- Request for Appeals Support Information
- Staff Conference Notification
- Documentation of Contact complete (e.g., contact forms for calls and letters including request for agreed upon information, etc.)
- CALCULATION OF REVISED ASSESSMENT FORM completed, signed and dated. Prepare for updating main Benefit Assessment data base.
- Exhibits identified in the stipulations complete, labeled and in order
- Notification of Board Meeting
- Unsigned Copy of Agreement placed in case file
- Unsigned Copy of Resolution placed in case file
- Duplicate and unnecessary drafts removed
- Prepare appeals data base update sheet
- Update appeals data base
- File appeals data base update sheet

EXHIBIT 8

BENEFIT ASSESSMENT APPEAL: PLEASE UPDATE SHEET NO. 1

DATE FILLED OUT 4/12/88 BY J. Coile
Please indicate the Case #, the planner assigned, and a brief description of the source of the new information each time you use one of these forms. Other than that, just enter the new or changed data. Thank you for your cooperation.

CASE NO.: AI-810-86, AI-700-86, AI-701-86, AI-702-86
AI-679-86 ASSIGNED PLANNER: M Gioacisic

DATA SOURCE: M Gioacisic

DATE PETITION FILED: _____

PROPERTY OWNER(S): _____

OWNER'S ADDRESS: _____

MAILING ADDRESS: _____

OWNER'S TELEPHONE: _____

REPRESENTATIVE: _____

REP'S ADDRESS: _____

REP'S TELEPHONE: _____

PROPERTY ADDRESS: _____

MAP BOOK: _____ PAGE: _____ PARCEL NO.: _____

BA DISTRICT: (1) SCRTD-CBD: _____ (2) SCRTD-WILSHIRE _____

FY 1986 SCRTD BENEFIT ASSESSMENT: \$ _____

BASIS FOR APPEAL: Please check-off as shown on the petition.

- _____ 1. INCORRECT ASSESSMENT OF ALL-EXEMPT PROPERTY
- _____ 2. INCORRECT ASSESSMENT OF MIXED EXEMPT/NON-EXEMPT PROPERTY
- _____ 3. SIZE OF PROPERTY INCORRECTLY BILLED
- _____ 4. BUILDING DESIGN RESTRICTS RENTAL SPACE TO 80% OR LESS
- _____ 5. PROPERTY LOCATED OUTSIDE BENEFIT ASSESSMENT DISTRICT
- _____ 6. RESIDENTIAL/APARTMENT HOTEL
- _____ 7. BUILDING VACANT DUE TO PUBLIC REGULATORY CODES
- _____ 8. PROPERTY WILL NOT BENEFIT
- _____ 9. ANY NOT LISTED ABOVE. PLEASE SUMMARIZE BELOW:

DATE CASE WITHDRAWN: 3/29/88

For use by data base staff only:

Date appeals db updated: M Sorenson

Date assessors db updated: _____

Date to case file: _____

By: 4/13/88

By: _____

By: _____

AUDITOR-CONTROLLER NOTIFICATION

A. Prepare notice to AUDITOR-CONTROLLER'S OFFICE, announcing change in the direct assessment fee.

1. Prepare cover transmittal letter CORRECTION JOINT CONSOLIDATED TAX BILL for Ball (see Exhibit 9, page 23). Extra copies may be printed ahead of time as this form letter does not change (see Exhibit 10, page 24)

- a. Print on General Manager letterhead using letter quality printer
- b. Do NOT date letter
- c. Prepare envelope with red logo

2. Type in DIRECT ASSESSMENT CORRECTION LIST FORM according to working copy (see Instructions for Preparation, page 25)

3. Compile transmittal materials

- a. Make 5 copies of letter and form, collate and staple copies only
- b. Prepare letter size folder with items for General Manager's signature. Attach a routing slip indicating letter for General Manager's signature. Include:

paper clipped on right side of folder:
Original letter with forms

paper clipped on left side of folder:
2 copies, with yellow highlighter in right hand corner, marked "Yellow" (in lieu of yellow paper)

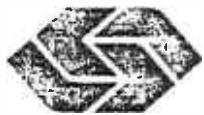
2 copies, no highlighting

- c. Hold copy for follow-up. Note in corner:
"for signature mm/dd/yy"

B. Process through Planning Manager, Director of Planning, Assistant General Manager, General Manager.

C. After transmittal letter for Auditor-Controller's Office is returned with signature from General Manager, process as follows:

1. Make a copy of signed letter and Direct Assessment Correction List form for the following:
 - a. Auditor-Controller Notification File (see APPEALS CHANGE SUBJECT FILE, page 45)
 - b. Each pertinent Property Owner Notification (see PROPERTY OWNER NOTIFICATION, page 31) and each Case file (see CASE FILES, page 17)
2. Mail original letter and form to Auditor-Controller's Office



RTD

John A. Dyer
General Manager

DEC 15 1987

Mr. Michael Galindo
Division Chief, Tax Division
Department of Auditor-Controller
153 Hall of Administration
Los Angeles, California 90012

Attention: Linda Aquaro

Dear Mr. Galindo:

SCRTD - Central Business District DIRECT ASSESSMENTS
CORRECTION TO JOINT CONSOLIDATED TAX BILL

In accordance with previous arrangements for processing corrections to SCRTD Metro Rail assessments, it is requested that a corrected Joint Consolidated Tax Bill be issued for the properties listed on the attached form.

If you have any questions, please contact Gary S. Spivack, Director of Planning, SCRTD, 425 South Main Street, Los Angeles, California, 90013, at (213) 972-6170.

Sincerely,

John A. Dyer

Attachment

DIRECT ASSESSMENT CORRECTION LIST

Agency Name SCRTD
 Account No. 37.02
 Authorization No. _____

Rate Year	1986-1987
--------------	-----------

Parcel Number	Seq. No.	CD	Original Amt.	New Amt.
1 5143-023-012	86000	5	66 912	
2 5161-026-010	86000	7	5,535	2,285
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Instructions for Preparation of County of Los Angeles
DIRECT ASSESSMENT CORRECTION LIST

Prepare a working copy of the Form for each Account No.

A1 parcels: enter 37.02 for agency account number.
A2 parcels: enter 37.03 for agency account number.
For special cases enter 37.04; e.g., when the assessment is
greater than 99,999.99 and should be proposed as two assessments.

1. Take Account Number from The Los Angeles County Auditor-
Controller's Agency Lien List (LOS9 Report). This report is
sent to the District in the fall after the Joint
Consolidated Tax Bills have been processed by the Auditor-
Controller's Office. Each account number should be put on a
separate form)

2. Leave "Authorization No." blank

3. Enter Parcel Number for each case as it appears in the Board
Report

List in Parcel Number order - lowest number first

Make notation of case number in the margin for convenience in
cross-checking

4. The Sequence Number to be used for the 1986-87 tax year is
86000

*Account Number on DIRECT ASSESSMENT CORRECTION LIST must
match Account Number on the LOS9 Report*

5. Calculate Check Digit (use either hand calculation or pc
calculation methods as outlined in following pages)(see Exhibits
11 and 12, pages 26 and 30)

6. Take Original Amount from the LOS9 Report

"Original Amount" refers to original amount of the assessment.
Verify that the amount shown on the LOS9 Report matches the amount
on the copy of the stipulations in case file.

7. Use Agreements (attached to Board Report) to verify Parcel
Number, Original Amount, and to enter New Amount

Verify Parcel Number and New Amount with signed resolutions

8. Complete "Prepared By" and "Date".

9. Leave "Batch Number" blank.

EXHIBIT

COUNTY OF LOS ANGELES

DIRECT ASSESSMENT CORRECTION LIST

Agency Name SCRTD
Account No. (1)
Authorization No. (2)

Rate Year	1986-1987
-----------	-----------

	Parcel Number	Seq. No.	CD	Original Amt.	New Amt.
1	(3)	(4)	(5)	(6)	(7)
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Prepared By (8) Date _____

Batch Number	(9)
--------------	-----

CHECK DIGIT COMPUTATION
HAND CALCULATION METHOD

1. Start with the left hand (high order) digit of the Parcel Number and double each alternate (left hand 1 to 3, 5, 7, etc.)
2. Add together each of the digits created by doubling (9 doubled = 18: add 1 + 8) with each of the original digits which was not doubled
3. Subtract the last (low order) digit of the result of the addition (in 2 above) from 10 giving the check digit
 - (10 - 0 = 10: the check digit is 0)
 - (10 - 1 = 9: the check digit is 9)
 - (10 - 9 = 1: the check digit is 1)

Examples:

Digit Positions:	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Parcel Number:	1 0 3 1 2 7 0 0 3 1	4 9 4 7 9 9 0 0 0 0
Step 1.	2 6 4 0 6	8 8 1 8 0 0
Step 2.	2+0+6+1+4+7+0+0+6+1	8+9+8+7+1+8+9+0+0+0+0
	- 27	- 50
Step 3.	10	10
	- 7	- 0
Check Digit	- 3	- 0

CALCULATE CHECKDIGIT

Set pc to work in dBASE III

A. Prepare checkdigit database.

open chkdgt data base. At dot prompt.

TYPE:

.USE CHKDGT <↓

Clear out any parcel numbers from prior runs. At dot prompt.

TYPE:

.ZAP <↓

follow prompts... computer will ask you if you want to
zap past info Y/N? Answer by typing

Y <↓

Create a record for each parcel number for which you need a
checkdigit. At dot prompt.

TYPE:

.APPEND <↓

this brings up an empty record screen

Type the 10 digit parcel number onto parcel field
(within the highlighted area; type all 10 digits
continuously without spaces or bars [all blocks will be
filled])

Press page down button. (more highlighted empty blocks will
appear) Continue typing 10 digit parcel numbers until parcel
numbers have been entered for all properties

Exit record screen.

TYPE:

Ctrl W <↓

do this after last parcel number is entered. This
will take you out of record file and give you a dot
prompt.

Close file.

TYPE:

.USE <↓

B. Run program to calculate checkdigit.

Be sure printer is set up. At dot prompt.

TYPE:

```
.DO CHKDGT <|
```

Follow prompt screen will ask you for file name containing parcel numbers.

TYPE:

```
CHKDGT <|
```

As the checkdigit is calculated both the parcel number and the checkdigit will be displayed on the screen.

When the checkdigit has been calculated for all parcel numbers, a list of parcel numbers and checkdigits will be printed (see sample, page 30).

Your file is closed and the program will return you to the dot prompt.

EXHIBIT 12

SAMPLE CHECKDIGIT CALCULATION

Record#	PARCELNO	CHKDGT
1	5142005019	6
2	5142005003	4

PROPERTY OWNER NOTIFICATION LETTERS

A. Create letter for property owner notification of Board Action.

1. Use form letter appropriate for time of year that the notification is processed (see Exhibit 13, 14, 15 and 16, pages 33, 34, 35 and 37). The particular version of the letter sent to the property owner for notification of the change in assessment is determined by the month in which the Board takes action

EDIT THE FOLLOWING TO CONFORM WITH INDIVIDUAL CASE DATA:

property owner/representative
mailing address
salutation
case number
parcel number
property address/location
Meeting Date
\$ assessment
date processing should be complete

* In some cases special attachments are necessary, if so you should note "ATTACHMENTS" on the bottom of the letter

2. Print on Director of Planning letterhead using letter quality printer (see Exhibit 13, page 33)
3. Prepare 5 copies of unsigned letter
4. Prepare letter size file folder for transmittal of letters for Director of Planning's signature. Each case/letter should have its own folder

Include:

Paper clipped on right side of folder:
Original letter

Paper clipped on left side of folder:
2 copies, with yellow highlighter in right hand corner, marked "Yellow" (in lieu of yellow paper)
1 copy, no highlighting

Hold one copy for follow-up. Note in corner: "for signature mm/dd/yy"

5. Take to Manager of Policy, Environment and Finance Section with a routing slip: "Petitioner Notification Letters for Director of Planning's Signature". Put follow-up copy and any other related information in each case file. Keep a list of letters out for signature. Follow up, if they are not returned within a reasonable time

B. After the Director of Planning signs property owner notification letter, prepare original letter for mailing certified mail.

1. Place copy of signed letter and all attachments in individual case file
2. Each original letter to property owner will be mailed via certified mail including a copy of NOTICE TO AUDITOR CONTROLLER'S OFFICE FOR CORRECTION TO JOINT CONSOLIDATED TAX BILL and signed copy of the cover letter (see instructions CERTIFIED MAIL PROCESS, page 39)
3. Xerox a copy of the envelope and the Certification form (see Exhibit 17, Page 40)

Write case #, petitioner's and/or representative's name in corner of copy, date mailed

Hold until white and green copies of Certification form are returned

4. Signed green certification form is attached to the copy of letter and put in case file when it is returned
5. Place copy of all letters with attachments in the Benefit Assessment chrono file and place a yellow copy in the Director of Planning's chrono file.



Gary S. Spivack
Director of Planning

March 5, 1987

Rafael and Martina Vasquez
2254 26th Street
Santa Monica, California 90405

Dear Property Owner:

The Metro Rail Benefit Assessment appeals case A1-20-86 for the property identified by the Assessor's Mapbook No. 5149-020-012, was approved by the SCRTD Board of Directors at their February 26, 1987 Board meeting. As a result, the direct assessment for your property, 5149-020-012 has been changed to \$10,083. The SCRTD is forwarding this information to the County Auditor-Controller's Office for adjustment of your Joint Consolidated Tax Bill.

If you have paid the first installment of your Joint Consolidated Tax Bill, and it has been recorded, a reduction will be made in the amount due for your second installment. If the reduction is greater than the balance due on your tax bill, a notation that a refund is due to you, the property owner, will be made on your corrected Joint Consolidated Tax Bill. The refund will be issued by the Auditor-Controller's Office after the issuance of your corrected Joint Consolidated Tax Bill.

If you have made a partial payment of your Joint Consolidated Tax Bill, you may receive a Tax Bill which includes a penalty payment based on the unpaid balance. This adjusted tax bill is automatically generated when the partial payment is made. However, once the corrected benefit assessment is processed, a corrected Joint Consolidated Tax Bill will be issued with the corrected amounts and no penalty will be included.

If you have not paid the first installment of your tax bill, or if the correction notice is received by the Auditor-Controller's Office prior to recording the payment of the first installment, then the adjusted amount will be split between the two installment payments and a new Joint Consolidated Tax Bill with new payment dates will be issued to you.

Processing a corrected Joint Consolidated Tax Bill takes approximately 30 to 60 days, therefore, you should expect to receive your adjusted bill by approximately the end of April. Your direct assessment is identified on the adjusted bill by the line "SCRTD - CBD". This adjusted billing is your total Joint Consolidated Tax Bill and should be paid according to the adjusted payment schedule indicated on your bill.

Sincerely,

33


Gary S. Spivack

April 1 thru June 1

**RTD**

Gary S. Spivack
Director of Planning

June 2, 1987

Ms. Fern Leaf
1249 Lodi Place
Los Angeles, CA 90038

Dear Ms. Leaf:

The Metro Rail Benefit Assessment appeals case A2-30-86 identified by the Assessor's Mapbook No. 5142-011-011, located at 690 S. Burlington St. was approved by the SCRTD Board of Directors at their May 28 Board meeting. As a result, the direct assessment for your property, 5142-011-011 has been changed to \$0. The SCRTD is forwarding this information to the County Auditor-Controller's Office for adjustment of your Joint Consolidated Tax Bill.

If you have paid both installments of your Joint Consolidated Tax Bill, and they have been recorded, a reduction will be made in the amount due on your tax bill; and a notation that a refund is due to you, the property owner, will be made on your corrected Joint Consolidated Tax Bill. The refund will be issued by the Auditor-Controller's Office after the issuance of your corrected Joint Consolidated Tax Bill.

If you have made a partial payment of your Joint Consolidated Tax Bill, you may receive a Tax Bill which includes a penalty payment based on the unpaid balance. This adjusted tax bill is automatically generated when the partial payment is made. Once the corrected benefit assessment is processed, a corrected Joint Consolidated Tax Bill will be issued with the corrected amounts and no penalty will be included. However if your partial payment does not equal the taxes and assessment due after correction of your SCRTD benefit assessment, there will be a penalty due on the unpaid portion.

Processing a corrected Joint Consolidated Tax Bill takes approximately 30 to 60 days, therefore, you should expect to receive your adjusted bill by approximately the end of July. Your direct assessment is identified on the adjusted bill by the line "SCRTD - CBD". This adjusted billing is your total Joint Consolidated Tax Bill and should be paid according to the adjusted payment schedule indicated on your bill.

Sincerely,

A handwritten signature in cursive script that reads "Gary S. Spivack".

Gary S. Spivack

Attachments

34

June Through October 15



October 9, 1987

Gary S. Spivack
Director of Planning

Mr. Daniel B. Swartz
Four Eleven Associates
411 West Fifth Street, 8th Floor
Los Angeles, California 90013

Dear Mr. Swartz:

The Metro Rail Benefit Assessment Appeals Case No. A1-218-86 for the property identified by the Assessor's Mapbook Number, Parcel No. 5149-028-010, located at 702 North Hill Street, Los Angeles, California, was approved by the Southern California Rapid Transit District Board of Directors at their September 24, 1987 Board meeting. As a result, the direct assessment on your property, Parcel No. 5149-028-010, has been changed to \$29,236.00. The SCRTD has forwarded this information to the Los Angeles County Auditor-Controller's Office for adjustment to your account.

The 1986-87 Tax Roll has now been officially closed by the Auditor-Controller's Office. There will be no more corrected Joint Consolidated Tax Bills issued for the 1986-87 Tax Year. Any changes in assessments are now processed manually. If you have paid the full amount of both installments of your 1986-87 Joint Consolidated Tax Bill, and these payments have been recorded, a refund is due to you. A refund check will be issued to you by the Auditor-Controller's Office for the amount overpaid. If the SCRTD Board has approved an adjustment to your benefit assessment prior to September 1987, the earliest receipt of your refund check is November 1987. If the Board makes an adjustment on your assessment after September 1987, you should expect a refund check within 60 days after the Auditor-Controller's Office has been notified by SCRTD of the Board's action.

If you made a partial payment on your 1986-87 Joint Consolidated Tax Bill, you may have received a delinquent tax notice which includes a penalty payment based on the unpaid balance. This delinquent tax notice is automatically generated by the Treasurer-Tax Collector when only a partial payment is made. If your partial payment did not equal the taxes and adjusted SCRTD assessment, there will be a penalty due on this unpaid portion.

If your partial payment is larger than the taxes and the adjusted SCRTD assessment, you should receive a refund of the amount overpaid. If there is a penalty indicated, you may request a refund of the penalty (if paid) on the amount that represents that portion of the paid assessment that was eliminated. To request the refund, send a letter entitled "Claim for Refund of Penalty" to:

Tax Division, Office of the Auditor-Controller
500 West Temple Street, Room 153
Los Angeles, California 90013

Mr. Daniel B. Swartz
Page Two
October 9, 1987

If your account with the Treasurer-Tax Collector indicates that any taxes have not been paid as of June 30, 1987, your 1987-88 Joint Consolidated Tax Bill will contain a notation: "Tax Defaulted." Also, the Treasurer-Tax Collector will automatically include the property on the list of 1986-87 delinquent parcels that is published in August 1987. After June 30, even if your assessment is reduced so that your account shows no further unpaid taxes for 1986-87, the Treasurer-Tax Collector will not be able to prevent the computer from placing a "Tax Defaulted" notation on your next Joint Consolidated Tax Bill nor prevent inclusion on the published list of delinquent properties. If you have no amount outstanding on your 1986-87 account, please disregard the "Tax Defaulted" notation.

Please contact Jennifer Coile at (213) 237-2125 or David Sikes at (213) 237-2129 if you have any questions.

Sincerely,

Gary S. Spivack

After October 15



Gary S. Spivack
Director of Planning

December 29, 1987

Mr. Bernard Mullahy
8730 Wilshire Boulevard
Beverly Hills, CA 90211

Dear Mr. Mullahy:

The Metro Rail Benefit Assessment Appeals Case No. A1-345-86, for the property identified by the Assessor's Mapbook Number, Parcel No. 5143-003-012, located at 1127 Wilshire Blvd. Los Angeles, was approved by the Southern California Rapid Transit District Board of Directors at their December 10, 1987 Board meeting. As a result, the direct assessment for your property, Parcel No. 5143-003-012, has been changed to \$55.252. The SCRTD has forwarded this information to the Los Angeles County Auditor-Controller's Office for adjustment to your account.

The 1986-87 Tax Roll has now been officially closed by the Auditor-Controller's Office. There will be no more corrected Joint Consolidated Tax Bills issued for the 1986-87 Tax Year. Any changes in assessments are now processed manually.

If you have paid the full amount of both installments of your 1986-87 Joint Consolidated Tax Bill, and these payments have been recorded, a refund check will be issued to you by the Auditor-Controller's Office for the amount overpaid. You should expect a refund check within 60 days after the Auditor-Controller's Office has been notified by the SCRTD of the Board's action.

If you made a partial payment on your 1986-87 Joint Consolidated Tax Bill, you may have received a delinquent tax notice which includes a penalty payment based on the unpaid balance. This delinquent tax notice is automatically generated by the Treasurer-Tax Collector when only a partial payment is made. If your partial payment did not equal the taxes and adjusted SCRTD assessment, there will be a penalty due on this unpaid portion.

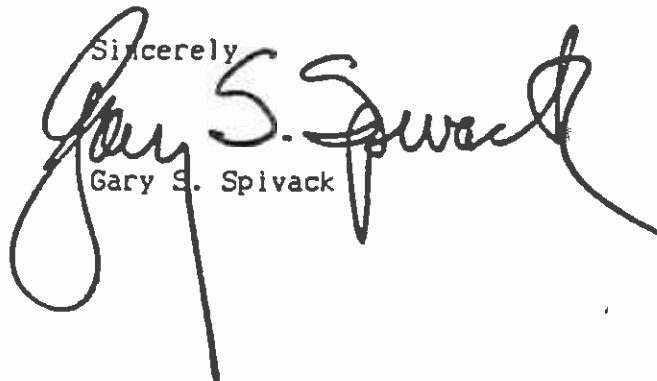
If your partial payment is larger than the taxes and the adjusted SCRTD assessment, you should receive a refund of the amount overpaid. If there is a penalty indicated, you may request a refund of the penalty (if paid) on the amount that represents that portion of the paid assessment that was eliminated. To request the refund, send a letter entitled "Claim for Refund of Penalty" to:

Tax Division, Office of the Auditor-Controller
500 West Temple Street, Room 153
Los Angeles, California 90013

Mr. Bernard Mullhay
Page Two
December 29, 1987

If your account with the Treasurer-Tax Collector had indicated that any taxes had not been paid as of June 30, 1987, your 1987-88 Joint Consolidated Tax Bill would have automatically included the property on the list of 1986-87, delinquent parcels that was published in August 1987. After June 30, 1987, even if your assessment was reduced so that your account showed no further unpaid taxes for 1986-87, the Treasurer-Tax Collector would not have been able to prevent the computer from placing a "Tax Defaulted" notation on your 1987-88 Joint Consolidated Tax Bill nor prevent inclusion of the property on the published list of delinquent properties. If you have no amount outstanding on your 1986-87 account, please disregard the "Tax Defaulted" notation.

Please contact Jennifer Colle at (213) 237-2125 or David Sikes at (213) 237-2129 if you have any questions.

Sincerely

Gary S. Spivack

CERTIFIED MAIL PROCESS

- 0 Use green certified mail forms available from SCRTD mail room located in the basement
- 0 Fill forms out completely:
 - 1. Fill out white slip (see Exhibit 17, page 40)
 - a. Name
Address
City State Zip
 - b. On the receipt for certified mail (write the Planning Department-Your Name). You can write this anywhere along the side
 - c. Do not fill anything else in on that slip (white)
 - 2. Fill out the green slip (see Exhibit 17, page 40)
 - a. On the front portion of the green slip (write Planning Department-Your Name-Case Number) underneath the Address, City, State and Zip Code of the sender
 - b. Check off the box marked certified
 - c. On the back side of the green slip, write the Certified Mail Article Number that is provided on the white slip
 - d. Do not fill anything else in on that slip (green)
- 0 Scotch tape the number portion of the receipt for certified mail at the top of the envelope immediately to the right of the SCRTD return address
- 0 Attach the form that is solid green to the back side of the envelope
- 0 Mail before 3:30 p.m. daily in the SCRTD Mail room in the basement

EXHIBIT 17

CERTIFIED MAIL

(WHITE)

(GREEN)

P 363 239 413
RECEIPT FOR CERTIFIED MAIL

NO INSURANCE COVERAGE PROVIDED—
NOT FOR INTERNATIONAL MAIL

(See Reverse)

Sent to <input checked="" type="checkbox"/>	
Street and No. <input checked="" type="checkbox"/>	
P.O., State and ZIP Code <input checked="" type="checkbox"/>	
Postage	\$
Certified Fee	
Special Delivery Fee	
Restricted Delivery Fee	
Return Receipt Showing to whom and Date Delivered	
Return Receipt Showing to whom, Date, and Address of Delivery	
TOTAL Postage and Fees	\$
Postmark or Date	

Planning Department/Dave Silkes

PS Form 3800, Feb. 1982



PS Form 3811, July 1983

SENDER: Complete items 1, 2, 3 and 4.

Put your address in the "RETURN TO" space on the reverse side. Failure to do this will prevent this card from being returned to you. The return receipt fee will provide you the name of the person delivered to and the date of delivery. For additional fees the following services are available. Consult postmaster for fees and check box(es) for service(s) requested.

- Show to whom, date and address of delivery.
- Restricted Delivery.

3. Article Addressed to:

4. Type of Service:	Article Number
<input type="checkbox"/> Registered <input type="checkbox"/> Insured <input checked="" type="checkbox"/> Certified <input type="checkbox"/> COD <input type="checkbox"/> Express Mail	<input checked="" type="checkbox"/>

Always obtain signature of addressee or agent and **DATE DELIVERED.**

- Signature - Addressee
X
- Signature - Agent
X
- Date of Delivery
- Addressee's Address (*ONLY if requested and fee paid*)

DOMESTIC RETURN RECEIPT

CERTIFIED MAIL FOLLOW UP

- 0 Take a xerox copy of the green slip, white slip and the addressed envelope all on the same page (see Exhibit 18, page 42)
- 0 Write the case number and date you mailed it on the photocopy
- 0 File the photocopy copy accordingly
- 0 When the white slip comes back, attach it to the photocopy
- 0 When the green slip comes back signed match it to the photocopy
- 0 Compare the article #. Once they match take the case # from the photocopy and use it to find the case file
- 0 File the signed green copy in the appropriate case file (be sure you staple the green slip to the notification letter so that later you will know which letter was sent out certified)
- 0 Once the signed green copy has been filed, you may discard the photo copy with your notes for follow-up

Mailed Dec 22 87
 Southern California Rapid Transit District
 15 South Main Street, Los Angeles, California 90013

EXHIBIT 18

green returned
 1-20-88



Mr. Bernard Mullhay
 8730 Wilshire Boulevard
 Beverly Hills, CA 90211

CASE #
 A1-345-86

PS Form 3811, July 1983

SENDER: Complete items 1, 2, 3 and 4.

Put your address in the "RETURN TO" space on the reverse side. Failure to do this will prevent this card from being returned to you. The return receipt fee will provide you the name of the person delivered to and the date of delivery. For additional fees the following services are available. Consult postmaster for fees and check box(es) for service(s) requested.

1. Show to whom, date and address of delivery.
 2. Restricted Delivery.

3. Article Addressed to:
 Mr. Bernard Mullhay
 8730 Wilshire Boulevard
 Beverly Hills, CA 90211

4. Type of Service: Article Number
 Registered Insured P 363 239 466
 Certified COD
 Express Mail

Always obtain signature of addressee or agent and **DATE DELIVERED.**

5. Signature - Addressee
 X

6. Signature - Agent
 X

7. Date of Delivery

8. Addressee's Address (ONLY if requested and fee paid)

DOMESTIC RETURN RECEIPT

P 363 239 466
RECEIPT FOR CERTIFIED MAIL
 NO INSURANCE COVERAGE PROVIDED—
 NOT FOR INTERNATIONAL MAIL
 (See Reverse)

Sent to Mr. Bernard Mullhay	
Street and No. 8730 Wilshire Boulevard	
P.O., State and ZIP Code Beverly Hills CA 90211	
Postage	\$
Certified Fee	
Special Delivery Fee	
Restricted Delivery Fee	
Return Receipt Showing to whom and Date Delivered	
Return Receipt Showing to whom, Date, and Address of Delivery	
TOTAL Postage and Fees	\$
Postmark or Date	

PS Form 3800, Feb. 1982

CERTIFIED

P 363 239 466

DATA BASE REVISIONS AS A RESULT OF THE APPEALS PROCESS

Complete a CALCULATION OF REVISED ASSESSMENT FORM.

Place one copy in the case file and forward one copy to the person in charge of maintaining the main benefit assessment data base (see Exhibit 19, page 44).

EXHIBIT 19

CALCULATION OF REVISED ASSESSMENT

PARCEL NO. _____ APPEALS CASE NO. _____

BUILDING NAME _____

ORIGINAL ASSESSMENT \$ _____ REVISED ASSESSMENT \$ _____

<u>LAND USE CATEGORY</u>	<u>ORIGINAL SQ. FT.</u>	<u>REVISED SQ. FT.</u>
PARCEL SQ. FT.	_____	_____
OFFICE	_____	_____
HOTEL	_____	_____
RETAIL/MOTEL	_____	_____
SERVICE	_____	_____
VACANT LAND	_____	_____
PARKING LOT	_____	_____
GARAGE	_____	_____
INDUSTRIAL/WAREHOUSE	_____	_____
INSTITUTIONAL/GOVT	_____	_____
RESIDENTIAL	_____	_____
INSTITUTIONAL/LAND	_____	_____
VACANT DUE TO CODE	_____	_____
RESIDENTIAL HOTEL	_____	_____
EXEMPT/NON-PROFIT	_____	_____

REVISED ASSESSMENT CALCULATION:

PARCEL AREA GREATER THAN IMPROVEMENT _____ X \$.30 = \$ _____

IMPROVEMENT GREATER THAN PARCEL AREA _____ X \$.30 = \$ _____

EXEMPT IMPROVEMENT SQ. FT. _____ EXEMPT PARCEL SQ. FT. _____

ANNUAL RENEWAL CATEGORIES:

RESIDENTIAL HOTEL ___ WHOLESALE ___ VACANT DUE TO CODE ___ NON-PROFIT ___

CONDITIONS FOR CALCULATION: (attach worksheet)

CASE WITHDRAWN ___ PRO-RATION NECESSARY ___

CALCULATION NEED ADJUSTMENT ___

CHANGE IN PROPERTY STATUS:

CHANGE IN OWNERSHIP ___ NEW CONSTRUCTION ___ DEMOLITION ___ OTHER ___

PREPARED BY _____ DATE _____ ENTERED _____ BY _____

APPEALS CHANGE SUBJECT FILE

Be sure the Calculation Form has been completed and that the necessary information has been entered into the Data Base (see DATA BASE MANUALS).

Use both the INDIVIDUAL CASE FILE REVIEW CHECKLIST (see page 19) and the POST BOARD MEETING CHECKLIST (see page 46) to be sure all items have been completed.

The Appeals Change Subject File contains copies of the letters of notification to the Los Angeles County Auditor-Controllers Office.

POST-BOARD MEETING
OVERALL CHECKLIST

CASES:

SCRTD BOARD MEETING

CALCULATION FORM
Case Files

Data Base

BOARD REPORT
Board Report Notebook

Case Files (cover memo only)

BOARD REPORT INDEX UPDATE
Board Report Notebook

AUDITOR CONTROLLER NOTIFICATION
Case Files

Subject File

PROPERTY OWNER NOTIFICATION LETTER
Case File

Chronological Files (without attachments)

RESOLUTION AND AGREEMENT (with seal)
Case File (original)

District Notebook (original)