

---

GENERAL PLANNING CONSULTANT:  
TECHNICAL MANUAL 88.4.3  
NOTIFICATION OF PROPERTY OWNERS REGARDING  
BENEFIT ASSESSMENT APPEALS PUBLIC HEARINGS  
FOR THE METRO RAIL SYSTEM (MOS-1)

---

Prepared for:  
Southern California Rapid Transit District

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

in association with

Cordoba Corporation  
Manuel Padron  
The Planning Group, Inc.

June, 1988

**MTA LIBRARY**

29666530

TABLE OF CONTENTS

	<u>Page</u>
INTRODUCTION.....	1
1.0 <u>BENEFIT ASSESSMENT PUBLIC HEARING REQUIREMENTS</u> .....	14
2.0 <u>ESTABLISHING A BENEFIT ASSESSMENT DISTRICT</u> .....	15
2.1 CODE REQUIREMENTS FOR PUBLIC HEARING NOTIFICATION....	15
2.2 SCRTPD POLICIES FOR MAILING PUBLIC HEARING NOTIFICATION.....	15
3.0 <u>BOND HEARING</u> .....	16
3.1 CODE REQUIREMENTS FOR PUBLIC HEARING NOTIFICATION....	16
3.2 SCRTPD POLICIES FOR MAILING PUBLIC HEARING NOTIFICATION.....	17
4.0 <u>BENEFIT ASSESSMENT APPEALS HEARINGS</u> .....	18
4.1 CODE REQUIREMENTS FOR PUBLIC HEARING NOTIFICATION....	18
4.2 SCRTPD POLICIES FOR MAILING PUBLIC HEARING NOTIFICATION.....	18
5.0 <u>TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS</u> .....	19
6.0 <u>PUBLICATION OF PUBLIC HEARING NOTICE</u> .....	24
6.1 ESTABLISHING A BENEFIT ASSESSMENT DISTRICT.....	24
6.2 BOND HEARING.....	24
6.3 APPEALS CASES.....	24
7.0 <u>THE MASTER MAILING LIST</u> .....	28
7.1 USE OF THE MASTER MAILING LIST FOR GENERAL MAILINGS OF BENEFIT ASSESSMENT RELATED INFORMATIONAL MATERIALS.....	31
7.2 MAINTENANCE OF THE MASTER MAILING LIST.....	36
7.3 ANNUAL UPDATING WITH LOS ANGELES ASSESSOR'S DATA.....	36

TABLE OF CONTENTS (continued)

	<u>Page</u>
7.4 UPDATING ON THE BASIS OF UNDELIVERABLE MAIL.....	37
7.5 UPDATING ON THE BASIS OF APPEALS FORMS AND OTHER CORRESPONDENCE.....	38
8.0 <u>PROCEDURES FOR HANDLING RETURNS</u> .....	39
8.1 POSTAL RETURN INSTRUCTIONS.....	39
8.2 NO FORWARDING INSTRUCTIONS.....	40
9.0 <u>INDEX OF MAILING LIST UPDATE SAMPLES</u> .....	43
10.0 <u>CREATION OF AN INDIVIDUALIZED MAILING LIST</u> .....	57
10.1 MAILING LIST WORKSHEET.....	57
10.2 MAILING LABELS.....	57
10.3 PREPARATION FOR PRINTING LABELS.....	58
10.4 HOW TO HANDLE PAPER JAMS.....	59
10.5 HOW TO SORT DATABASE FILE BY ZIP CODE.....	60
11.0 <u>DATABASE PROGRAM INDEX</u> .....	61
12.0 <u>PUBLIC HEARING NOTIFICATION SUBJECT FILE</u> .....	73
13.0 <u>DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILING</u> .....	74
13.1 PREPARATION.....	74
13.2 PUBLICATION AND MAILING.....	74
13.3 RETURNS AND REMAILING.....	75
13.4 TALLIES AND STATISTICS.....	75
14.0 <u>SAMPLE INDEX OF LETTER TO PROPERTY OWNERS</u> .....	78
15.0 <u>SAMPLE INDEX OF MAILING FILE MEMORANDUM</u> .....	86

20666530

LIST OF FIGURES

<u>FIGURE</u>	<u>PAGE</u>
1. Public Utilities Code	2
2. Government Code	12
3. Timeline Hearing Process	20
4. Completed Timeline Hearing Process	22
5. Hearing for Establishing Benefit Assessment Districts	25
6. Bond Hearing	26
7. Public Hearing	27
8. Map of MOS-1 Benefit Assessment District A1	29
9. Map of MOS-1 Benefit Assessment District A2	30
10. MOS-1 Benefit Assessment Database Directory Master List	33
11. Mailing List Update	42
12. Original Benefit Assessment Appeal Petition	50
13. Postal Returned Letter	51
14. Benefit Assessment Appeal Petition with Address Listed	52
15. Letter of Change of Address	53
16. Corrected Benefit Assessment Appeal Petition	54
17. Disposition of Returned Mail	55
18. Letter Returned From Post Office with Newly Addressed Letter	56
19. MAKELIST.PRG	62
20. TLIST.PRG	63
21. MAINLAB.PRG	64
22. SIDE.PRG	66
23. BREAKELAB.PRG	67

LIST OF FIGURES (continued)

<u>FIGURE</u>	<u>PAGE</u>
24. PRTLIST.PRG	71
25. ONELAB.PRG	72
26. Mailing File Memorandum	76
27. How to do Calculations for the Mailing File Memorandum	77

## INTRODUCTION

The purpose of this manual is to describe the procedures used for notification of Public Hearings to property owners within the Benefit Assessment District for the Minimal Operable Segment-1 (MOS-1) of the Metro Rail System. These notification procedures were developed to comply with the requirements as outlined in Section 33000 et seq. of the California State Public Utilities Code (Code).

In addition, 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.

## PUBLIC UTILITIES CODE

## § 33000

## PUBLIC UTILITIES CODE

## Section

33009. Accrued interest and premiums received on sale of bonds; disposition.  
 33010. Refunding bonds.  
 33011. Bonds as legal investment or security.  
 33012. Changes authorized; presumption relating to right-of-way of common carrier.  
 33013. Changes requiring notice.  
 33014. Hearing on changes; resolution.  
 33015. Finality of decisions and determinations of board; waiver of objection, appeal, or protest.  
 33016. Limitation of actions; proceedings contesting validity or legality of formation; incontestability clause.  
 33017. Certification to county assessor of imposition of special benefit assessment; delivery of documents to assessor; levy and collection of assessments.  
 33019. Conflict with other law.  
 33020. Pledge of general fund revenues.

*Chapter 12 was added by Stats.1983, c. 1322, § 4.*

## § 33000. Legislative findings and declarations

The Legislature finds and declares that:

(a) It is necessary and in the best interest of the citizens of the state to authorize the Southern California Rapid Transit District to levy special benefit assessments for needed public rail rapid transit facilities and services on the property which benefits from those facilities and services.

(b) The rail rapid transit facilities and services provide special benefits to parcels of land, and improvements thereon, in the vicinity of rail rapid transit stations, and provide general benefits to the community at large. The Board of Directors of the Southern California Rapid Transit District shall be the conclusive judge of the proportion of special and general benefits produced by the facilities and of the distribution of the special benefits among parcels of property within the benefit assessment district.

(Added by Stats.1983, c. 1322, § 4.)

## § 33001. Resolution providing for notice and hearing on intention to establish districts and levy assessment

(a) Whenever the board finds that property adjacent to, or in the vicinity of, one or more rail transit stations, or proposed rail transit stations, of the district receives or will receive special benefit by reason of the location or operation of one or more of those rail transit stations, the board may, by resolution adopted by a two-thirds vote of its members, provide for notice and hearing on its intention to establish one or more special benefit districts and to levy a special benefit assessment on real property therein for the purpose of financing, in whole or in part, the acquisition, construction, development, joint development, operation, maintenance, or repair of one or more rail transit stations and rail transit related facilities located within the benefit district.

(b) For purposes of this chapter, "benefit district" means a special benefit assessment district established pursuant to this chapter, the area of which shall not lie more than one mile from the center point of any rail transit station or proposed rail transit station within the central business district of the City of Los Angeles and shall not lie more than one-half mile from the center point of any rail transit station or proposed rail transit station at any other location. "Central business district of the City of Los Angeles" means that area within the City of Los Angeles lying east of the Harbor Freeway (State Highway Route 11).

(c) The resolution may provide that the proposed benefit district will contain separate zones, which may consist of either contiguous or noncontiguous areas of land within the district. The proposed benefit district and each proposed zone, if any, therein shall be an area adjacent to, or in the vicinity of, one or more rail transit stations or proposed rail transit stations. The boundaries of the benefit district and of each zone, if any, therein shall be drawn so as to reflect, as accurately as possible, the areas in which special benefits are conferred by reason of the proximity and operation of one or more rail transit stations.

(d) The notice stating the time and place of the hearing, and setting forth the boundaries and purpose of the proposed benefit district, shall be published prior to the time fixed for the hearing pursuant to Section 6066 of the Government Code.

Underline Indicates changes or additions by amendment

(e) Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the proposed benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the district.

(f) For purposes of this chapter, "transit related facilities" means land, buildings and equipment or any interest therein, whether or not the operation thereof produces revenue, which has, as its primary purpose, the operation of the rail transit system or the providing of services to the passengers of the rail transit system, but does not mean any land, buildings, or equipment, or interest therein, which is used primarily for the production of revenue not arising from the operation of the rail transit system.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33001.5. Hearing on establishment of district; time and place; resolution; determination by board**

(a) At the time and place fixed for the hearing on the establishment of the benefit district, or at any time and place to which the hearing is adjourned, the board shall proceed with the hearing. At the hearing, interested persons may appear and present matters material to the proposed board action. At the conclusion of the hearing, the board shall, by a resolution adopted by a two-thirds vote of its members, determine whether to proceed with the proposed action.

The resolution shall state, as appropriate, the maximum and minimum rate of assessment, the amount of the special benefit assessment and the purposes for which it is to be levied, the estimated cost of accomplishing the purposes, and the dates or approximate intervals at which the assessment shall be levied. The resolution shall also state that the exterior boundaries of the benefit district are set forth on a map on file with the secretary of the district, which map shall govern for all purposes as to the extent of the benefit district and zones, if any, therein and that the area set forth on the map shall thereupon constitute and be known as "Benefit District No. \_\_\_\_\_ of the Southern California Rapid Transit District," or as "Benefit Zone \_\_\_\_\_ of the Benefit District No. \_\_\_\_\_ of the Southern California Rapid Transit District," as designated by the board.

(b) The resolution shall be submitted to the governing body. The governing body shall, after a public hearing conducted by the governing body and prior to the creation of the benefit district, approve, or amend and approve, as amended, or disapprove the geographic boundaries of the benefit district and the method of assessment. The resolution of approval or disapproval from the governing body shall be returned to the board.

(c) The board shall, by a two-thirds vote of its members, determine whether to create the benefit district as approved by the governing body. If the board decides to proceed with creating the benefit district as approved by the governing body, the board may, in addition to any amendments made by the governing body, reduce the size of the benefit district, but in so doing shall not include any territory not included in the benefit district approved by the governing body nor change the approved method of assessment. The determination by the board is final and conclusive.

(d) For purposes of this section, "governing body" means the city council of a city in which the proposed benefit district is located or, if the benefit district is located in unincorporated territory, the board of supervisors of the county in which the proposed benefit district is located.

(e) The board may provide in the resolution, or in a later resolution adopted by a two-thirds vote of the members of the board, for changes in the assessment to particular real property within the benefit district or any zone therein arising out of changes in the parcel area or floor area of that real property.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33002. Amount of special benefit assessment; nature of assessments; powers of district; use of revenue**

(a) In determining the amount of a special benefit assessment, the board may measure the benefit to real property in the benefit district or zones therein by the parcel area of unimproved real property and by the parcel area and the floor area of real property and improvements thereto of improved real property, as deemed appropriate by a resolution adopted by a two-thirds vote of the members of the board.

Asterisks \* \* \* indicate deletions by amendment



§ 33002

PUBLIC UTILITIES CODE

(b) The special benefit assessment constitutes a charge imposed on particular real property for a district-project of direct benefit to that property, and does not constitute ad valorem taxes or any other form of general tax levy applying a given rate to the assessed valuation of all taxable property within the district.

(c) The district shall possess all powers necessary for, incidental to, or convenient for the collection, enforcement, administration, or distribution of the special benefit assessment in accordance with California law.

(d) The revenue from a special benefit assessment, which is imposed pursuant to this chapter, or from bonds secured by such a special benefit assessment, for the purpose of financing a rail transit station or rail transit related facility located within the benefit district, shall be used only for financing of the facility for which it was levied, and that revenue shall not be used for any other purpose or the payment of any other expense of the district, including, but not limited to, transit, transportation, or operating expense.

(Added by Stats. 1983, c. 1322, § 4.)

§ 33002.1. Order for benefit assessment without election

The board may order benefit assessment without an election, except as otherwise provided in Section 33002.2.

(Added by Stats. 1983, c. 1322, § 4.)

§ 33002.2. Election; finding

An election shall be held if the board finds that a petition requesting that the proposal be submitted to confirmation by the voters has been signed by the owners of at of at least 25 percent of the assessed value of real property within the benefit district.

(Added by Stats. 1983, c. 1322, § 4.)

§ 33002.3. Elections; number of votes per voter

(a) For purposes of this chapter, "voter" means an owner of real property which is assessed or proposed to be assessed under this chapter and which is within the boundaries of the benefit district.

(b) In any election conducted under this chapter, each voter in the benefit district may cast one vote for each one thousand dollars (\$1,000), or fraction thereof, worth of land or improvements owned by the voter in the benefit district as is shown on the most recent equalized assessment roll.

(Added by Stats. 1983, c. 1322, § 4.)

§ 33002.4. Multiple ownership; designation of owner for purposes of qualifying as voter; legal representative

(a) Where land in the benefit district is owned in joint tenancy, tenancy in common, or any other multiple ownership, the owners of that land shall designate in writing which one of the owners shall be deemed the owner of that land for purposes of qualifying as a voter.

(b) The legal representative of a corporation or an estate owning real property in the benefit district may act on behalf of the corporation or the estate.

(c)(1) For purposes of this chapter, "legal representative" means an official of a corporation owning real property in the benefit district.

(2) For purposes of this chapter, "legal representative" also means a guardian, conservator, executor, or administrator of the estate of the holder of title to real property in the benefit district who is all of the following:

- (A) The person is appointed under the laws of this state.
- (B) The person is entitled to the possession of the estate's real property.
- (C) The person is authorized by the appointing court to exercise the particular right, privilege, or immunity which he or she seeks to exercise.

Underline indicates changes or additions by amendment

**PUBLIC UTILITIES CODE**

**§ 33002.9**

(d) Before a legal representative acts as a voter at a district election, the legal representative shall present to the precinct board a certified copy of his or her authority which shall be kept and filed with the returns of the election.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33002.5. Petition for confirmation by voters; filing; adoption of resolution**

The petition for confirmation by the voters shall be filed with the board within 30 days after the conclusion of the public hearing required by Sections 33001 and 33001.5. If a petition meeting the requirements of Section 33002.2 is filed, the board shall adopt a resolution approving the proposal to form a benefit district subject to confirmation by the voters of the benefit district.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33002.6. Election on proposition of levying assessment by benefit district; resolution**

After the board has adopted a resolution approving the proposal to form a benefit district under Section 33002.5, but before the board may levy any assessment, the board shall call an election in the benefit district for the purpose of submitting to the voters the proposition of levying the assessment by the benefit district. The resolution calling the election shall state each of the items required to be contained in the resolution adopted pursuant to Section 33001.5.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33002.7. Special election on levying of assessment; time; procedure**

The board shall submit the proposition of levying an assessment to the voters of the benefit district in a special election to be held within 90 days following the adoption of the resolution calling an election. The provisions of the Elections Code relating to the manner of voting, the duties of election officers, the canvassing of returns, and all other particulars in respect to the management of elections, insofar as they may be applicable, shall govern all elections conducted pursuant to this chapter.

Ballots for the special election may be distributed to voters by mail with return postage prepaid, and shall be received by the district either by mail or hand delivery at the address shown on the postage prepaid envelope no later than 5:00 p.m. on the special election day.

The district shall pay to the county the reasonable expenses that the county incurs in conducting an election under this chapter, and the district may expend funds collected from the benefit assessment approved pursuant to the election for this purpose.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33002.8. Levy of assessment; majority approval**

If a majority of the votes cast at the election conducted under this chapter approve the proposition, the board may levy the assessment pursuant to the resolution adopted pursuant to Section 33002.

(Added by Stats. 1983, c. 1322, § 4.)

**§ 33002.9. Petition for exclusion from benefit district or reduction of assessment**

(a) Any owner or owners of real property, which is, in whole or in part, within the benefit district, or their legal representatives, may jointly or severally file with the board a petition requesting that the real property owned by them or for which they are the legal representative be excluded from the benefit district on the ground that the real property sought to be excluded is not benefited or that the assessment be reduced on the ground that the assessment exceeds the benefit to that real property.

(b) The real property sought to be excluded or upon which the assessment is sought to be reduced shall be described by its legal description and shall be accompanied by a map depicting its location in relation to the benefit district.

(c) The petition shall contain a statement of facts in support of the petition and shall be acknowledged by the owner or the legal representative filing the petition.

(Added by Stats. 1983, c. 1322, § 4.)

Asterisks \* \* \* indicate deletions by amendment

**§ 33002.10**

**PUBLIC UTILITIES CODE**

**§ 33002.10. Petition for exclusion or reduction; notice of hearing**

Notice of each hearing upon the petition for exclusion or reduction shall be given in accordance with subdivisions (d) and (e) of Section 33001.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33002.11. Hearing; petition for exclusion or reduction**

At the time and place provided in the notice or at any time and place to which the hearing is adjourned, the board or its appointed hearing officer shall hear all the following:

(a) The petition for exclusion or reduction.

(b) All evidence or proofs that may be introduced by or on behalf of the petitioners.

(c) All objections to the petition that may be presented in writing by any person, including the district.

(d) All evidence or proofs that may be introduced in support of objections to the petition.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33002.12. Hearing on exclusion or reduction; payment of expenses**

The expenses of giving the notice provided for herein and of the hearing on the exclusion or reduction petition shall be paid by the persons filing the petition.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33002.13. Denial of exclusion or reduction petition**

Upon the hearing on an exclusion or reduction petition by the board, or upon the record of hearing by a hearing officer, the board shall order the petition be denied when the petitioner has not shown by a preponderance of the evidence that in an exclusion petition his or her real property is not benefited or in a reduction petition that the assessment exceeds the benefit to the property.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33002.14. Order for exclusion or reduction; order confirming assessment subject to petition**

The board, after the hearing on an exclusion or reduction petition, shall order one of the following by resolution:

(a) In the case of an exclusion petition, order the exclusion of all or any part of the real property described in the petition upon its finding that the property will not be benefited by the operations of the district in the vicinity of the benefit district.

(b) In the case of a reduction petition, order a change in the benefit assessment to all or any portion of the real property described in the petition to provide that it not exceed the amount of benefit derived by the operations of the district in the vicinity of the benefit district.

(c) Confirm the assessment on the real property subject to the petition as correctly reflecting the amount of benefit to the real property.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33003. Bonded indebtedness; payment from special benefit assessments levied; resolution; publication of notice of time and place of hearing on proposed issuance of bonds**

(a) Following formation of the benefit district or concurrently therewith, if the board deems it necessary to incur a bonded indebtedness for the acquisition, construction, development, joint development, completion, operation, maintenance, or repair of one or more rail transit stations and related rail transit facilities located within the benefit district, the board may provide, by resolution, that the bonded indebtedness shall be payable from special benefit assessments levied within the benefit district. The resolution shall be adopted by a two-thirds vote of the members of the board, and shall declare and state all of the following:

(1) That the board intends to incur an indebtedness, by the issuance of bonds of the district, for the benefit district which the board has formed, or intends to form, within a portion of the district.

Underline indicates changes or additions by amendment

PUBLIC UTILITIES CODE

§ 33004

(2) The purposes for which the proposed debt is to be incurred, which may include all costs and estimated costs necessary or convenient for, incidental to, or connected with the accomplishment of the purposes, including, without limitation, engineering, inspection, legal, fiscal agent, financial consultant, bond and other reserve funds, working capital, bond interest estimated to accrue during the construction period, if any, and for a period not exceeding three years thereafter, and the expenses of all proceedings for the authorization, issuance, and sale of the bonds.

(3) The estimated cost of accomplishing the purposes and the amount of the principal of the indebtedness to be incurred.

(4) That a general description of the benefit district and of each zone, if any, therein and maps showing the exterior boundaries thereof are on file with the secretary of the district and available for inspection by any interested person.

(5) That special benefit assessments for the payment of the bonds, and the interest thereon, have been or shall be levied in the benefit district or zones therein by the parcel area of unimproved real property and by the parcel area and the floor area of real property and improvements thereto of improved real property, as deemed appropriate by a resolution adopted by a two-thirds vote of the members of the board, at rates which are sufficient in the aggregate, together with revenues already collected and available therefor, to pay the principal of, and interest on, all bonds of the district issued for the benefit district.

(6) The extent to which, if at all, all or a portion of the revenues of the district are to be used to pay the principal of, interest on, and sinking fund payments for, the bonds, including the establishment and maintenance of any reserve fund therefor.

(7) The time and place set for hearing on the proposed issuance of the bonds.

(8) That at the same time as the Board of Supervisors of the County of Los Angeles is required by law to fix the general tax levy and in the manner provided for the general tax levy, the district board shall levy and collect special benefit assessments in the benefit district or zones therein by the parcel area of unimproved real property and by the parcel area and the floor area of real property and improvements thereto of improved real property, as deemed appropriate by the district board, at rates which are sufficient in the aggregate, together with revenues already collected and available therefor, to pay the interest on the bonds as it becomes due, and the part of the principal of the bonds, including sinking fund installments required by any of the district's agreements with bondholders, as will become due before proceeds of a special benefit assessment, levied at the time of the next general tax levy, will be available for those purposes; and to provide or to restore the bond reserve fund to the amount required by any of the district's agreements with bondholders.

(9) The maximum term the proposed bonds shall run before maturity, which shall not exceed 40 years from the date of the bonds or any series thereof.

(10) The maximum rate or rates of interest to be paid, which shall not exceed 12 percent per annum.

(11) That the pledge of special benefit assessment revenues to the bonds authorized by this section has priority over the use of any of those revenues for pay-as-you-go financing, except to the extent that this priority is expressly restricted by any of the district's agreements with bondholders.

(b) The notice stating the time and place of the hearing on the proposed issuance of bonds shall be published prior to the time fixed for the hearing pursuant to Section 6066 of the Government Code.

(c) Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the district.

(Added by Stats.1983, c. 1322, § 4.)

§ 33004. Hearing on issuance of bonds payable from special benefit assessments levied; resolution

At the time and place fixed for the hearing on the issuance of bonds payable from special benefit assessments levied under this chapter, or at any time and place to which the hearing is adjourned, the board shall proceed with the hearing. Interested persons may appear at the hearing and present matters material to the questions set forth in the resolution. At the conclusion of the hearing on the proposed issuance of bonds, the board shall, by resolution adopted by a two-thirds vote of the members, determine whether to incur the bonded indebtedness.

Asterisks \* \* \* Indicate deletions by amendment

§ 33004

PUBLIC UTILITIES CODE

The resolution shall state the amount of the proposed debt, the purposes for which it is to be incurred, and the estimated cost of accomplishing the purposes. The determinations made in the resolution are final and conclusive.

(Added by Stats.1983, c. 1322, § 4.)

§ 33005. Rates of special benefit assessments; use of other district revenues

Special benefit assessments for the payment of the principal of, and interest on, bonds issued for a benefit district shall be levied in the benefit district at rates which are sufficient in the aggregate, together with revenues already collected and available therefor, to pay the principal of, and interest on, all bonds of the district issued for the benefit district. Other revenues of the district shall be used for the payment of the principal of, and interest on, the bonds only to the extent set forth in any agreement of the district for the benefit of bondholders.

Special benefit assessments in the benefit district and zones, if any, therein shall be calculated to reflect, as accurately as possible, the benefit received by the property assessed in the benefit district or zones, if any, therein as a result of the project to be financed thereby.

(Added by Stats.1983, c. 1322, § 4.)

§ 33006. Interest on bonds; call and redemption of bonds; denominations; payment of principal and interest; form of bonds

The bonds issued pursuant to this chapter shall bear interest at a rate or rates not exceeding 12 percent per annum, payable semiannually, except that the first interest payable on the bonds or any series thereof may be for any period not to exceed one year as determined by the board.

In the resolution or resolutions providing for the issuance of bonds, the board may also provide for call and redemption of the bonds prior to maturity at times and prices and upon any other terms that it may specify. However, no bond is subject to call or redemption prior to maturity unless the bond contains a recital to that effect. The denomination or denominations of bonds shall be stated in the resolution providing for their issuance, but shall not be less than five thousand dollars (\$5,000). The principal of, and interest on, the bonds shall be payable in lawful money of the United States at the office of the treasurer of the district or at any other place or places that may be designated by the board, or at either place or places at the option of the holders of the bonds. The bonds shall be dated, numbered consecutively, signed by the president and treasurer, and countersigned by the secretary and shall have the official seal of the district attached. The interest coupons of the bonds shall be signed by the treasurer. The seal and all signatures and countersignatures may be printed, lithographed, or mechanically reproduced, except that one signature or countersignature shall be manually affixed.

If an officer, whose signature or countersignature appears on the bonds or coupons, leaves office for any reason prior to the delivery of the bonds, the officer's signature is as effective as if the officer had remained in office.

(Added by Stats.1983, c. 1322, § 4.)

§ 33007. Sale of bonds; bids and bidding

The bonds issued pursuant to this chapter may be sold as the board determines by resolution. The board may sell the bonds at a price below par.

If the board determines by resolution that the bonds shall be sold by competitive bid, the board, before selling the bonds, or any part thereof, shall give notice inviting sealed bids in the manner that it prescribes. If satisfactory bids are received, the bonds offered shall be awarded to the highest responsible bidder. If no bids are received, or if the board determines that the bids received are not satisfactory as to price or responsibility of the bidders, the board may reject all bids received, if any, and either readvertise or sell the bonds at private sale or by negotiation, or by other lawful means.

If the board determines by resolution that the bonds shall not be sold by competitive bid, the board may sell the bonds at public or private sale, by negotiation, or by other lawful means.

(Added by Stats.1983, c. 1322, § 4.)

Underline Indicates changes or additions by amendment

**PUBLIC UTILITIES CODE**

**§ 33012**

**§ 33008. Delivery of bonds: purchase price in cash or bank credits**

Delivery of any bonds issued under this chapter may be made at any place either inside or outside the state, and the purchase price may be received in cash or bank credits.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33009. Accrued interest and premiums received on sale of bonds; disposition**

All accrued interest and premiums received on the sale of bonds issued by the district pursuant to this chapter shall be placed in the fund to be used for the payment of principal of, and interest on, those bonds. The remainder of the proceeds received on the sale of the bonds shall be placed in the treasury to secure those bonds or for the purposes for which the debt was incurred.

When the purposes for which the debt was incurred have been accomplished, any money remaining shall be either (a) transferred to the fund to be used for the payment of principal of, and interest on, the bonds or (b) placed in a fund to be used for the purchase of those outstanding bonds of the district, from time to time, in the open market at the prices and in the manner, either at public or private sale or otherwise, that the board determines. Bonds so purchased shall be canceled immediately.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33010. Refunding bonds**

The board may provide for the issuance, sale, or exchange of refunding bonds to redeem or retire any bonds issued by the district under this chapter upon the terms, at the times, and in the manner that it determines. Refunding bonds may be issued in a principal amount sufficient to pay all, or any part, of the principal of the outstanding bonds issued under this chapter, the interest thereon, and the premiums, if any, due upon call and redemption thereof prior to maturity and all expenses of the refunding.

The provisions of this chapter, for the issuance and sale of bonds apply to the issuance and sale of refunding bonds, except that, when refunding bonds are to be exchanged for outstanding bonds, the method of exchange shall be as determined by the board.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33011. Bonds as legal investment or security**

Any bonds issued under this chapter are legal investment for all trust funds; for the funds of insurance companies, commercial and savings banks, and trust companies; for state school funds; and, whenever any money or funds may, by any law now or hereafter enacted, be invested in bonds of cities, counties, school districts, or other districts within this state, the money or funds may be invested in the bonds issued under this chapter.

Whenever bonds of cities, counties, school districts, or other districts within this state may, by any law now or hereafter enacted, be used as security for the performance of any act or the deposit of any public money, bonds issued under this chapter may be so used.

The provisions of this chapter are in addition to all other laws relating to legal investments and are controlling as the latest expression of the Legislature with respect thereto.

(Added by Stats.1983, c. 1322, § 4.)

**§ 33012. Changes authorized: presumption relating to right-of-way of common carrier**

The board may change the purposes for which any proposed debt is to be incurred, the estimated cost, the amount of bonded debt to be incurred, or the boundaries of the benefit district or zones, if any, therein or one or all of those matters, except that the board shall not change the boundaries to include any territory which will not, in its judgment, be benefited by the district action.

For all purposes of this chapter, it is conclusively presumed that any right-of-way of a common carrier will not be benefited by the district action.

(Added by Stats.1983, c. 1322, § 4.)

**Asterisks \* \* \* indicate deletions by amendment**

§ 33013

PUBLIC UTILITIES CODE

§ 33013. Changes requiring notice

(a) The board shall not change the purposes, the estimated cost, the boundaries of the benefit district or zones, if any, therein, or the amount of bonded debt to be incurred until after it gives notice of its intention to do so, stating each proposed change in the purpose and stating, if applicable, that the exterior boundaries proposed to be changed are set forth on a map on file with the secretary of the district. The notice shall also specify the time and place set for hearing.

(b) The notice shall be published prior to the time set for the hearing pursuant to Section 6066 of the Government Code.

(c) The notice shall also be mailed at least 30 days prior to the hearing to all owners of real property affected by the proposed change whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the district.

(Added by Stats.1983, c. 1322, § 4.)

§ 33014. Hearing on changes; resolution

At the time and place fixed for a hearing on changes, or at any time and place to which the hearing is adjourned, the board shall proceed with the hearing. At the hearing, interested persons may appear and present matters material to the changes set forth in the notice.

At the conclusion of the hearing, the board shall, by resolution, determine whether to make any or all of the changes set forth in the notice. The determinations made in the resolution are conclusive and final.

(Added by Stats.1983, c. 1322, § 4.)

§ 33015. Finality of decisions and determinations of board: waiver of objection, appeal, or protest

All decisions and determinations of the board, upon notice and hearing, are final and conclusive upon all persons entitled to appeal to the board as to all errors, informalities, and irregularities which the board might have avoided or remedied during the progress of the proceedings or which it can, at that time, remedy.

Any objection, appeal, or protest not made at the time of any hearing is deemed to be waived voluntarily by any person who might have made the appeal, protest, or objection, and the person is deemed to have consented to the action taken following the hearing and any other matter on which objection, protest, or appeal could have been made.

(Added by Stats.1983, c. 1322, § 4.)

§ 33016. Limitation of actions; proceedings contesting validity or legality of formation; incontestability clause

Any action or proceeding, other than a petition for election pursuant to Section 33002.2, which contests, questions, or denies the validity or legality of the formation of any benefit district or zone, the issuance of any bonds therefor pursuant to this chapter, or any proceedings relating thereto, shall be commenced within six months from the date of the formation; otherwise, the formation of the benefit district or zone, the issuance of the bonds, and all proceedings relating thereto shall be held to be in every respect valid, legal, and incontestable.

(Added by Stats.1983, c. 1322, § 4.)

§ 33017. Certification to county assessor of imposition of special benefit assessment; delivery of documents to assessor; levy and collection of assessments

When the board has imposed a special benefit assessment, the secretary shall so certify to the assessor of the county in which the territory of any benefit district is located and deliver to the assessor copies of all maps and diagrams of the benefit district and zones, if any, therein, indicating the amount of the special benefit assessment to be levied within the benefit district and zones, if any, therein.

Underline indicates changes or additions by amendment

PUBLIC UTILITIES CODE

Special benefit assessments authorized by this chapter shall be levied and collected by the county at the same time and in the same manner as taxes are levied and collected. The county may deduct its reasonable expenses of collection and shall transmit the balance of the assessments to the district.  
(Added by Stats.1983, c. 1322, § 4.)

§ 33019. Conflict with other law

In the event of conflict with any other law, the provisions of this chapter shall prevail with respect to benefit districts within the district.  
(Added by Stats.1983, c. 1322, § 4.)

§ 33020. Pledge of general fund revenues

Notwithstanding any other provision of this chapter, the district shall not pledge any portion of its general fund revenues to pay any part of any bonded indebtedness incurred under this chapter unless required by provisions of the California Constitution.  
(Added by Stats.1983, c. 1322, § 4.)

PART 4. ORANGE COUNTY TRANSIT DISTRICT

Chapter	Section
8. Taxation .....	40300

CHAPTER 1. GENERAL PROVISIONS

§ 40005. "Transit"

Notes of Decisions

I. In general

"Chartered bus" and "sight seeing bus" as used in this section do not limit meaning of phrase "or any other motor vehicle not on individual passenger fare-paying basis" so as to preclude taxis from being included in that part of definition which excludes certain forms of transportation from definition of transit. *Yellow Cab of Northern Orange County v. Orange County Transit Dist.* (1976) 134 Cal.Rptr. 909, 65 C.A.3d 268.

Taxi services, one percent of business of which consisted of delivering telegrams and packages only and drivers of

which could collect only "flat fee" for trip regardless of number of persons sharing cab, did not come within definition of "transit" as transportation of passengers only and their incidental baggage by means other than by chartered bus, sightseeing bus or any other motor vehicle not on an individual passenger fare-paying basis, found in this section and thus were not "existing systems" to which Orange County transit district had to give written notice of proposed dial-a-ride operation or which had to be purchased before commencement of operation. *Id.*

CHAPTER 3. INTERNAL ORGANIZATION OF DISTRICT

ARTICLE 1. GOVERNMENT

Section

- 40060. Board of directors; selection.
- 40060.5. Terms of office; vacancies.
- 40062. Clerk, manager, counsel, treasurer and auditor; appointment.

§ 40060. Board of directors; selection

• • • The district shall be governed by a board of directors consisting of five members, selected as follows:

• • • (a) Two representing the county, appointed by the board of supervisors from their own membership.

• • • (b) Two representing all of the cities in the county, each of whom shall be a mayor or city councilman, appointed by all cities within the district acting jointly.

• • • (c) One representing the general public, who shall be a resident of Orange County and who shall not be or have been for two years previously a mayor or city councilman or a member of the board of supervisors, and who shall be appointed by a majority of the other four members of the

Asterisks • • • indicate deletions by amendment



**THE GOVERNMENT CODE**

Div. 7

MANNER OF PUBLICATION

§ 6066

**§ 6065. Eight weeks**

Publication of notice pursuant to this section shall be once a week for eight successive weeks. Eight publications in a newspaper regularly published once a week or oftener, with at least five days intervening between the respective publication dates not counting such publication dates, are sufficient. The period of notice commences upon the first day of publication and terminates at the end of the fifty-sixth day, including therein the first day.

(Added by Stats.1949, c. 1587, p. 2837, § 1. Amended by Stats.1957, c. 1670, p. 3050, § 4; Stats.1959, c. 954, p. 2985, § 6.)

**Historical Note**

The 1957 amendment, in the second sentence, substituted the words "in a newspaper regularly published once a week or oftener" for "whether in a daily or weekly newspaper". In the third sentence the words "on the day following the last day of publication" were substituted for "at the end of the eighth week thereafter."

The 1959 amendment, in the second sentence, inserted the words "with at least five days intervening between the respective publication dates not counting such publication dates.". In the third sentence the words "at the end of the fifty-sixth day, including therein the first day" were substituted for "on the day following the last day of publication."

**Cross References**

Actions to re-establish destroyed land records, publication of summons, see Code of Civil Procedure § 751.06.

**Law Review Commentaries**

Background and effect of 1959 amendment (1959) 34 S. Bar J. 694.

Background and general effect of 1957 amendment. (1957) 32 S. Bar J. 597.

**Library References**

Newspapers ↯3(4).  
Notice ↯11.  
Time ↯9(1).

C.J.S. Newspapers § 7.  
C.J.S. Notice §§ 9, 13, 18.  
C.J.S. Time § 13(1) et seq.

**§ 6066. Two weeks**

Publication of notice pursuant to this section shall be once a week for two successive weeks. Two publications in a newspaper published once a week or oftener, with at least five days intervening between the respective publication dates not counting such publication dates, are sufficient. The period of notice commences upon the first day of publication and terminates at the end of the fourteenth day, including therein the first day.

(Added by Stats.1951, c. 61, p. 182, § 1. Amended by Stats.1957, c. 1670, p. 3050, § 5; Stats.1959, c. 954, p. 2985, § 7.)

**Historical Note**

The 1957 amendment, in the second sentence, substituted the words "in a newspaper

published once a week or oftener" for "whether in a daily or weekly.". In the

third sentence the words "on the day following the last day of publication" were substituted for "at the end of the second week thereafter."

The 1959 amendment, in the second sentence, inserted the words "with at least five days intervening between the respec-

tive publication dates not counting such publication dates." In the third sentence the words "at the end of the fourteenth day, including therein the first day" were substituted for "on the day following the last day of publication."

**Cross References**

- Community redevelopment projects, special tax assessments, resolution of intent, notice of hearing, see Health and Safety Code § 33828.
- Dissolution of library commission, see Education Code § 18452.
- Fresno metropolitan transit district, publication of ordinances and notices, see Public Utilities Code App. 2, § 1.12.
- Library commission, Notice of hearing on Appointment, see Education Code § 18440.
- North Lake Tahoe—Truckee River sanitation agency.
- Bond election, publication under this section, see Water Code Appendix §§ 114 to 291, 114 to 292.
- Notice of hearing, stabilization and marketing plan, see Food and Agricultural Code § 62184.
- Notice of sale of property left by tenant, see Civil Code § 1988.
- Preliminary description of ungranted tidelands, see Public Resources Code § 6334.
- Publication of resolution for annexation, see Public Utilities Code § 50274.
- Revolution proposing annexation, publication, see Water Code Appendix § 114-462.
- Stockton metropolitan transit district,
  - Publication of ordinances and notices pursuant to this section, see Public Utilities Code § 50013.
- Table grape commission, election results, see Food and Agricultural Code § 65573.
- Water district bond issue, notice of hearing, application of this section, see Water Code § 36254.

**Law Review Commentaries**

- Background and effect of 1959 amendment (1959) S. Bar J. 694.
- Background and general effect of 1957 amendment. (1957) 32 S. Bar J. 597.
- Gion v. City of Santa Cruz—where do we go from here? Jay L. Shavelson (1972) 47 S. Bar J. 415.

**Library References**

- Newspapers ⇨3(4).
- Notice ⇨11.
- Time ⇨9(1).
- C.J.S. Newspapers § 7.
- C.J.S. Notice §§ 9, 13, 18.
- C.J.S. Time § 13(1) et seq.

**Notes of Decisions**

**1. In general**

Where court in denying application for temporary restraining order to enjoin special election indicated it would entertain motion to restrain issuance of bonds, if election was favorable to issuance, until there had been hearing on whether three-judge court should be convened to test constitutionality of this section relating to published notice, reviewing court would deem complaint amended to add this section as additional state statute questioned on constitutional grounds. *Pierre v. Jordan* (C.A.1964) 333 F.2d 951.

Original mandamus proceeding could be maintained in district court of appeal to compel clerk of board of supervisors of county to publish notice inviting bids on music center theatre and forum ground lease pursuant to resolution of board of supervisors, where, in practical sense superior court ruling had already been obtained upholding validity of contracts, and music center was in actual operation and main tenant of music center was being forced to operate at additional expense until theatre was completed. *Los Angeles County v. Nesvig* (1965) 41 Cal.Rptr. 918, 231 C.A.2d 603.

Public Hearing Requirements

## 1.0 BENEFIT ASSESSMENT PUBLIC HEARING REQUIREMENTS

The California State Public Utilities Code (CODE, see pages 2-11) provides that Public Hearings be held in various circumstances including but not restricted to the following:

- 1.0.1 In the event of a proposal to establish a Benefit Assessment District to levy special benefit assessments for needed public rail rapid transit facilities and services on the property which benefits from those facilities and services (see ESTABLISHING A BENEFIT ASSESSMENT DISTRICT, page 15).
- 1.0.2 In the event that the SCRTD Board deems it necessary to incur a bonded indebtedness for the acquisition, construction, development, joint development, completion, operation, maintenance, or repair of one or more rail transit stations and related rail transit facilities located within the benefit district (see BOND HEARINGS, page 16).
- 1.0.3 In the event that any owner of real property files for exclusion from the benefit assessment district on the ground that the real property sought to be excluded is not benefitted or that the assessment be reduced on the ground that the assessment exceeds the benefit to that real property (see BENEFIT ASSESSMENT APPEALS HEARINGS, page 18).

## 2.0 ESTABLISHING A BENEFIT ASSESSMENT DISTRICT

Section 33000 of the California State Public Utilities Code (CODE, see pages 2-11) authorizes the Southern California Rapid Transit District to levy special benefit assessments for needed public rail rapid transit facilities and services on the property which benefits from those facilities and services. Section 33001 of the Code provides that notice of each hearing stating the time and place of the hearing, and setting forth the boundaries and purpose of the proposed benefit district, shall be published prior to the time fixed for the hearing pursuant to Section 6066 of the Government Code. In accordance with subdivision (e) of Section 33001 of the Code, notice must also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD).

### 2.1 CODE REQUIREMENTS FOR PUBLIC HEARING NOTIFICATION

2.1.1 Notice be appropriately published (see PUBLICATION OF PUBLIC HEARING NOTICE, page 24).

2.1.2 "Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the proposed benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD)." (see CREATION OF AN INDIVIDUALIZED MAILING LIST, page 57).

### 2.2 SCRTD POLICIES FOR MAILING PUBLIC HEARING NOTIFICATION

2.2.1 Preparation of Notification Schedule (see TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS, pages 19).

2.2.2 Follow-up mailings (see UPDATING ON THE BASIS OF UNDELIVERABLE MAIL, page 37).

2.2.3 Documentation (see DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS, page 74).

### 3.0 BOND HEARINGS

Section 33003 of the California State Public Utilities Code (CODE, see pages 2-11) provides that following the formation of the benefit district, or concurrently therewith, the board may incur a bonded indebtedness for the acquisition, construction, development, joint development, completion, operation, maintenance, or repair of one or more rail transit stations and related rail transit facilities located within the benefit district. The board may provide, by resolution, that the bonded indebtedness shall be payable from special benefit assessments levied within the benefit district. Section 33003 of the Code provides that notice of each hearing on the proposed issuance of bonds shall be published prior to the time fixed for the hearing pursuant to Section 6066 of the Government Code. In accordance with subdivision (11c) of Section 33003 of the Code, notice must also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD).

The notice shall be sent to inform the property owner that the SCRTD intends to issue Benefit Assessment Bonds for the purpose of financing, in part, the construction of the rail rapid transit stations within Benefit Assessment Districts A1 and A2 of SCRTD. The notice shall also inform all property owners of the date, time and place of a public hearing to allow interested persons to comment on the proposed issuance of Benefit Assessment District Bonds.

#### 3.1 CODE REQUIREMENTS FOR PUBLIC HEARING NOTIFICATION

3.1.1 Notice be appropriately published (see PUBLICATION OF PUBLIC HEARING NOTICE, page 24).

3.1.2 "Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the proposed benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD)." (see CREATION OF AN INDIVIDUALIZED MAILING LIST, page 57).

3.2 SCRTD POLICIES FOR MAILING PUBLIC HEARING NOTIFICATION

- 3.2.1 Preparation of Notification Schedule (see TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS, pages 19).
- 3.2.2 Follow-up mailings (see UPDATING ON THE BASIS OF UNDELIVERABLE MAIL, page 37).
- 3.2.3 Documentation (see DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS, page 74).

#### 4.0 BENEFIT ASSESSMENT APPEALS HEARINGS

Section 33002.9 of the California State Public Utilities Code (CODE, see pages 2-11) provides for any owner of real property or their legal representative to file for exclusion from the benefit assessment district on the ground that the real property sought to be excluded is not benefited or that the assessment be reduced on the ground that the assessment exceeds the benefit to that real property. Section 33002.10 of the Code provides that notice of each hearing upon the petition for exclusion or reduction shall be given in accordance with subdivisions (d) and (e) of Section 33001 of the Code, which require notice of the hearing to be appropriately published and, in addition, the Code specifically states, "Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the proposed benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD)"(emphasis added).

#### 4.1 CODE REQUIREMENTS FOR PUBLIC HEARING NOTIFICATION

4.1.1 Notice be appropriately published (see PUBLICATION OF PUBLIC HEARING NOTICE, page 24).

4.1.2 "Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the proposed benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD)." (see CREATION OF AN INDIVIDUALIZED MAILING LIST, page 57).

#### 4.2 SCRTD POLICIES FOR MAILING PUBLIC HEARING NOTIFICATION

4.2.1 Preparation of Notification Schedule (see TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS, page 19).

4.2.2 Follow-up mailings (see UPDATING ON THE BASIS OF UNDELIVERABLE MAIL, page 37).

4.2.3 Documentation (see DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS, page 74).



## 5.0 TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS

Develop a timeline specific to the purpose of the public hearing for which notice is being given.

An example of the development of a timeline for benefit assessment appeals cases public hearings follows.

- 5.0.1 Establish a list of procedurally mandated steps with time requirements (see TIMELINE FOR HEARING PROCESS, page 20).
- 5.0.2 Fill in administrative requirements and complete time frame estimates (see TIMELINE FOR HEARING PROCESS, see sample, page 20).
- 5.0.3 Use TIMELINE FOR HEARING PROCESS form to guide the process and establish dates for the specific appeals case public hearing for which notice is required (see sample, page 20).

FIGURE 3

Date Prepared: \_\_\_\_\_

Revised: \_\_\_\_\_

Prepared by: \_\_\_\_\_

TIMELINE FOR HEARING PROCESS

Hearing No. \_\_\_\_\_

A-1 \_\_\_\_\_

A-2 \_\_\_\_\_

Petitioner: \_\_\_\_\_

<u>Step</u>	<u>Time Frame</u>	<u>Estimated Date</u>
Petitioner requests hearing and \$1,000 check received	More than one week before Board Meeting	
Staff schedules appointment of Hearing Officer at next Board Meeting and notifies Petitioner of Board Meeting	Next regular meeting	
Board appoints Hearing Officer and Alternate	Second or fourth Thursday of the month	
Staff contact Hearings Officer and Petitioner to verify no conflict of interest and set hearing date, in 50 to 65 days	ASAP after Board meeting	
Notify Petitioner of date in writing	ASAP after H.O./Petitioner concurrence	
Staff prepare mailing labels	40-50 Days prior to Hearing	
Staff arrange for publication of legal notice	40 days prior to hearing	
Staff arrange for printing and stuffing of property owner notice	40 days prior to hearing	
Staff mail notice to property owners	35 days prior to hearing	

Timeline for Hearing Process  
Page Two

<u>Step</u>	<u>Time Frame</u>	<u>Estimated Date</u>
First day of publication of legal notice	32 days prior to hearing	
Public Notice Period starts	At least 30 days prior to hearing	
Second day of publication of legal notice	22 days prior to hearing	
Last day to file request under Rights of Discovery	20 days prior to hearing	
Last date for mailing affidavit for evidence	10 days prior to hearing	
***HEARING***	Set by H.O. and Petitioner	
Hearing Continuation	Set by H.O, and Petitioner	
Hearing Conclusion		
Hearing Officer prepares written findings of fact and determination	Within 30 days of conclusion	
Petitioner and SCRTD responds to determination	Within 14 days of mailing	
If no objection, findings submitted to Board	Next regular meeting	
If objection, proceed with Board appointment of Appeals Panel	Next regular meeting	
Mail notices to property owners	30 days before hearing	
Publish legal notice twice	30 days before hearing and one week later	

Date Prepared: \_\_\_\_\_

Revised \_\_\_\_\_

Prepared by \_\_\_\_\_

FIGURE 4

TIMELINE FOR HEARING PROCESSHearing No. H86-1A1-047-86A2 \_\_\_\_\_Petitioner: MANLEY OIL COMPANY

<u>Step</u>	<u>Time Frame</u>	<u>Estimated Date</u>
Petitioner requests hearing and \$1,000 check received	More than one week before Board meeting	APRIL 6, 1987
Staff schedules appointment of Hearing Officer at next Board Meeting and notifies Petitioner of Board meeting	Next regular meeting	APRIL 13, 1987
Board appoints Hearing Officer and Alternate	Second or fourth Thursday of the month	APRIL 23, 1987
Staff contact Hearing Officer and Petitioner to verify no conflict of interest and set hearing date, in 50 to 65 days	ASAP after Board meeting	
Notify Petitioner of date in writing	ASAP after H.O./Petitioner concurrence	
Staff prepare mailing labels	Begin after Board Meeting	
Staff arrange for publication of legal notice	40 days prior to hearing	by JUNE 1
Staff arrange for printing and stuffing of property owner notice	40 days prior to hearing	JUNE 5-8
Staff mail notice to property owners	35 days prior to hearing	JUNE 8-10

Timeline for Hearing Process  
Page Two

<u>Step</u>	<u>Time Frame</u>	<u>Estimated Date</u>
First day of publication of legal notice	32 days prior to hearing	JUNE 10
Public Notice Period starts	At least 30 days prior to hearing	JUNE 12 - JULY 12
Second day of publication of legal notice	22 days prior to hearing	JUNE 21
Last day to file request under Rights of Discovery.	20 days prior to hearing	JUNE 23
Last date for mailing affidavit for evidence	10 days prior to hearing	JULY 3
*** HEARING ***	Set by H.O. and Petitioner	JULY 13
Hearing Continuation/Conclusion	Set by H.O.	
Prepare notification list	Within 10 days of initial hearing	
Mail notices to interested persons	14 days prior to continuation	
Notice petitioner(s)	14 days prior to continuation	
Hearing Officer prepares written findings of fact and determination	Within 30 days of conclusion	
Petitioner and SCRTD responds to determination	Within 14 days of mailing	
If no objection, findings submitted to Board	Next regular meeting	
If objection, proceed with Board appointment of Appeals Panel	Next regular meeting	

## **6.0 PUBLICATION OF PUBLIC HEARING NOTICE**

The California State Public Utilities Code (CODE, see pages 2-11) requires that notice of public hearings be published 30 days in advance of the public hearing in various circumstances including but not restricted to the following:

### **6.1 ESTABLISHING A BENEFIT ASSESSMENT DISTRICT**

Section 33001 of the CODE provides that notice of each hearing stating the time and place of the hearing, and setting forth the boundaries and purpose of the proposed benefit district, shall be published prior to the time fixed for the hearing pursuant to Section 6066 of the Government Code (see sample notice, page 25).

### **6.2 BOND HEARING**

Section 33003 of the CODE provides that notice of each hearing on the proposed issuance of bonds shall be published prior to the time fixed for the hearing pursuant to Section 6066 of the Government Code. The notice shall inform the property owner that the SCRTD intends to issue Benefit Assessment Bonds for the purpose of financing, in part, the construction of the rail rapid transit stations within Benefit Assessment Districts A1 and A2 of SCRTD. The notice shall also inform all property owners of the date, time and place of a public hearing to allow interested persons to comment on the proposed issuance of Benefit Assessment District Bonds (see sample notice, page 26).

### **6.3 APPEALS CASES**

Section 33002.9 of the CODE provides for any owner of real property or their legal representative to file for exclusion from the benefit assessment district on the ground that the real property sought to be excluded is not benefited or that the assessment be reduced on the ground that the assessment exceeds the benefit to that real property. Section 33002.10 of the CODE provides that notice of each hearing upon the petition for exclusion or reduction shall be given in accordance with subdivisions (d) and (e) of Section 33001 of the CODE which require notice of the hearing to be appropriately published (see sample notice, page 27).

## HEARING FOR ESTABLISHING BENEFIT ASSESSMENT DISTRICTS

**NOTICE OF PUBLIC HEARING REGARDING RESOLUTION OF  
INTENT OF THE BOARD OF DIRECTORS OF THE  
SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
TO FORM BENEFIT ASSESSMENT DISTRICTS**

The RTD Board of Directors has been granted the authority to establish benefit assessment districts in the vicinity of rail rapid transit stations which will be constructed as part of the first segment of the San Fernando Valley to downtown Los Angeles Metro Rail project. The purpose of the benefit assessment will be to finance, in part, the construction of the rail rapid transit stations within the benefit assessment districts. A public hearing to allow property owners to consider and comment upon the formation of the benefit assessment districts will take place at:

**LOCATION: SCRTD Headquarters Building, Board Room  
2nd Floor  
425 South Main Street  
Los Angeles, California 90013**

**DATE: Thursday, January 24, 1985  
TIME: 9:30 A.M.**

The locations of the benefit assessment districts will be in Downtown Los Angeles (the Central Business District) and in the vicinity of Wilshire Boulevard and Alvarado Street in the City of Los Angeles. Maps will be available at the public hearing.

At the public hearing, the resolution of Intent outlining the guidelines for establishing the benefit assessment districts will be presented. The location of the benefit assessment district boundaries, assessment fees for various land uses, and other information on the benefit assessment program will be provided. If you are unable to attend the hearing, write or call RTD for information: Lou Collier, RTD Community Relations, 425 S. Main Street, Los Angeles, CA 90013. Phone: (213) 972-6455

The District attempted to notify the following, but was unable to do so.

Names from Notices which were Returned as of January 11, 1985:

Forwarded to Another Address:

Kakano, George and Kawano, Ted; F.C. Development Group (Forest City); Salzar Realty; Greenberg, Albert; First Interstate Bank; Ticor - Corporate Offices; Harry M. Popkin Enterprises; A.J. Copp III; Empire General Life Insurance Company; L.A. Postal Employees Welfare and Recreational Committee; Cho, Sung H. and Kae S.; Richey, Emory H. and Dorothy V.; Sunday Inn Corporation; Hammerson Property Corporation; Herman Sobel; Ritzley Inc. Et Al; Spencer, Ruth I. Et Al; Grantsmanship Center; Fallas, Joe and Leona; Oka, Satomi; Prestige Office Equipment; McInerlyn, Robert T. and Nevitt D.; Graphic Arts Center Inc.; Equited Securities; Maguire Partners; Wells Fargo Bank.

Unable to Forward:

Western Jewelry Mart Joint; Knill, Charles C.; Lee, Timothy Et Al; Kaplan, Leo and Swartz, Jacob; Cooper, Lois N.; United States of America Bureau of Assessments; L.A. Land Company; Yeung, Yeung S.; Sherman, Ruth B. Et Al; Mann, Jerome and Foreman, Joseph; 730 Grand Associates; Kim Richard M. and Judy A.; Lopez, Angel Et Al; Civic Center Plaza Company; Hsu, Andrew; Huffman, James W. Et Al; M and M Investments; Westlake Ltd; Bayless, Boneita C. Et Al; 845 South Figueroa Associates; Eng, Hendrick P.; Kanazawa, Shoji; Donig of California Inc.; Macey Investment Corporation; Kim Sei Jong; Nguyen, Ai Duy and Nguyen, Xinh Duy; Wing Lung Bank Ltd; Wrenn, John H. Et Al; Training Trading and Investment Co. Inc. and Ngo, Jack C. and Anna H.; 833 S. Hill Street Corporation; Mejia, Ricardo and Martha; Cooper, Etta Et Al, Rodney, Sara; McNeill, Joseph D. and Angela; Willis, Evelyn D.; Prestige Property Management Inc.; Kure, Stan K. and Jacqueline L.; 600 South Spring Street Associates; George E. Platt Company; Rips, Norman and Stern, Herbert D.; Hurst, Carole; Italian Ch. of Lord Jesus Christ; Avatar Management Ltd.; U.S. Japan Realty Corporation; Collee, Patrick R.; Yatman, Lon S. and Esther L.; Errol Corporation; Stewart March Associates; Lee, Michael and Coda; Kavak, F. Can; The Guild Law School, Inc.; Sabagli, N.V.; Asian, Moses N.; Karno, Florence Et Al; Shapiro, Esther K.; Quimbros Investment Partnership; 424 Broadway Company; Gold, David and Sherry; Westwood Center Corporation Et Al; Trumbull Associates; Pershing Square Centre Associates; Harrell, Harrell J.; Garland, William M. II and Babcock, Gwendolyn G.; 828 Figueroa Investment Company; Karic Enterprises; Harper, Ken and Pat.

Southern California Rapid Transit District  
Nikoras Patsouras  
President, Board of Directors



Figure 6

BOND HEARING

**NOTICE OF PUBLIC HEARING**

**Regarding Resolution of the Board of Directors of the Southern California Rapid Transit District to Issue Benefit Assessment District Bonds**

The SCRTD Board of Directors has been granted the authority to incur bonded indebtedness through issuance of bonds associated with the established Benefit Assessment Districts A1 and A2 of the SCRTD.

The funds generated through the issuance of these Bonds will be to finance, in part, the construction of the rail rapid transit stations within Benefit Assessment Districts A1 and A2. A public hearing to allow interested persons to comment on the proposed issuance of Benefit Assessment district bonds will take place:

**Thursday, May 14, 1987, 1:00 P.M.**

**SCRTD Headquarters Building, Board Room  
425 South Main Street - Second Floor  
Los Angeles, California 90013**

At the public hearing, the resolution to incur bonded indebtedness will be presented. The issuance of bonds, in one or more series, with a maximum aggregate principal amount of \$187 million for Benefit Assessment District A1 and \$13 million for Benefit Assessment District A2 will be considered. Interested persons may appear at the hearing and present matters material to the items set forth in the resolution. Persons unable to attend the hearing may submit written testimony through 5:00 p.m., Thursday, May 14, 1987, the close of public record.

Correspondence should be addressed to:

**Office of the District Secretary  
Southern California Rapid Transit District  
425 South Main Street - Second Floor  
Los Angeles, California 90013  
Attn: District Bonding**



**Southern California Rapid Transit District  
Jan Hall, Director & President  
Dated: April 1, 1987**



PUBLIC HEARING

# PROOF OF PUBLICATION



## Los Angeles Times

STATE OF CALIFORNIA  
County of Los Angeles

I am a citizen of the United States and a resident of the County aforesaid; I am over the age of eighteen years, and not a party to or interested in the notice published. I am the CHIEF LEGAL ADVERTISING CLERK of the Publisher of the LOS ANGELES TIMES, a newspaper of general circulation, printed and published daily in the City of Los Angeles, County of Los Angeles, and the LOS ANGELES TIMES has been adjudged a newspaper of general circulation by the Superior Court of the County of Los Angeles, State of California, under the date of May 21, 1952, Case Number 598, 599; that the notice, of which the annexed is a printed copy (set in type not smaller than nonpareil), has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to-wit:

February 27<sup>th</sup>

all in the year 1988

I certify (or declare) under penalty of perjury that the foregoing is true and correct.

Dated at Los Angeles, California, this

29<sup>th</sup> day of February, 1988

[Signature]  
Signature

### NOTICE PUBLIC HEARING

The Southern California Rapid Transit District (SCRTD) will hold a hearing, Hearing No. H86-5 requested by the property owners Andrew K. and Gertrude I. Forthmann, Trustees of the Forthmann Family Revocable Trust; Forthmann Estate Company; and Andrew K. Forthmann and Madelaine Forthmann Boyer, Trustees, Rosanna Forthmann Trust, on benefit assessment appeals Case Nos. A1-319-86 to A1-323-86 for the properties located at 801-815 South Olive Street and 514 West 8th Street.

Section 33000 et seq. of the California Public Utilities Code authorizes a hearing by the SCRTD Board or its appointed hearing officer when property owners have petitioned to exclude their properties from assessments because the properties are not benefited or to reduce the assessments because they exceed the benefit to the properties. The hearing is Wednesday, March 30, 1988 at 9 a.m., in the Board Room, second floor of the SCRTD Headquarters Building, 425 South Main Street, Los Angeles.

Any correspondence about the hearing should specify the hearing number and be addressed to: Planning Department, Benefit Assessment Office - 5th Floor, SCRTD, 425 South Main Street, Los Angeles, California 90013, Attn: Hearing No. H86-5.

Questions should be directed to the Benefit Assessment Office at (213) 237-2125 or 237-2129. You may request to have your name placed on a mailing list for notices about further meetings on this case.

## CALIFORNIA NEWSPAPER SERVICE BUREAU, INC.

Legal Advertising Newspaper Representatives

Main Offices: 120 West Second Street  
P.O. Box 31  
Los Angeles, Calif. 90053

Other offices in Sacramento, San Francisco,  
San Diego and Santa Ana

The Master Mailing List

## 7.0 THE MASTER MAILING LIST

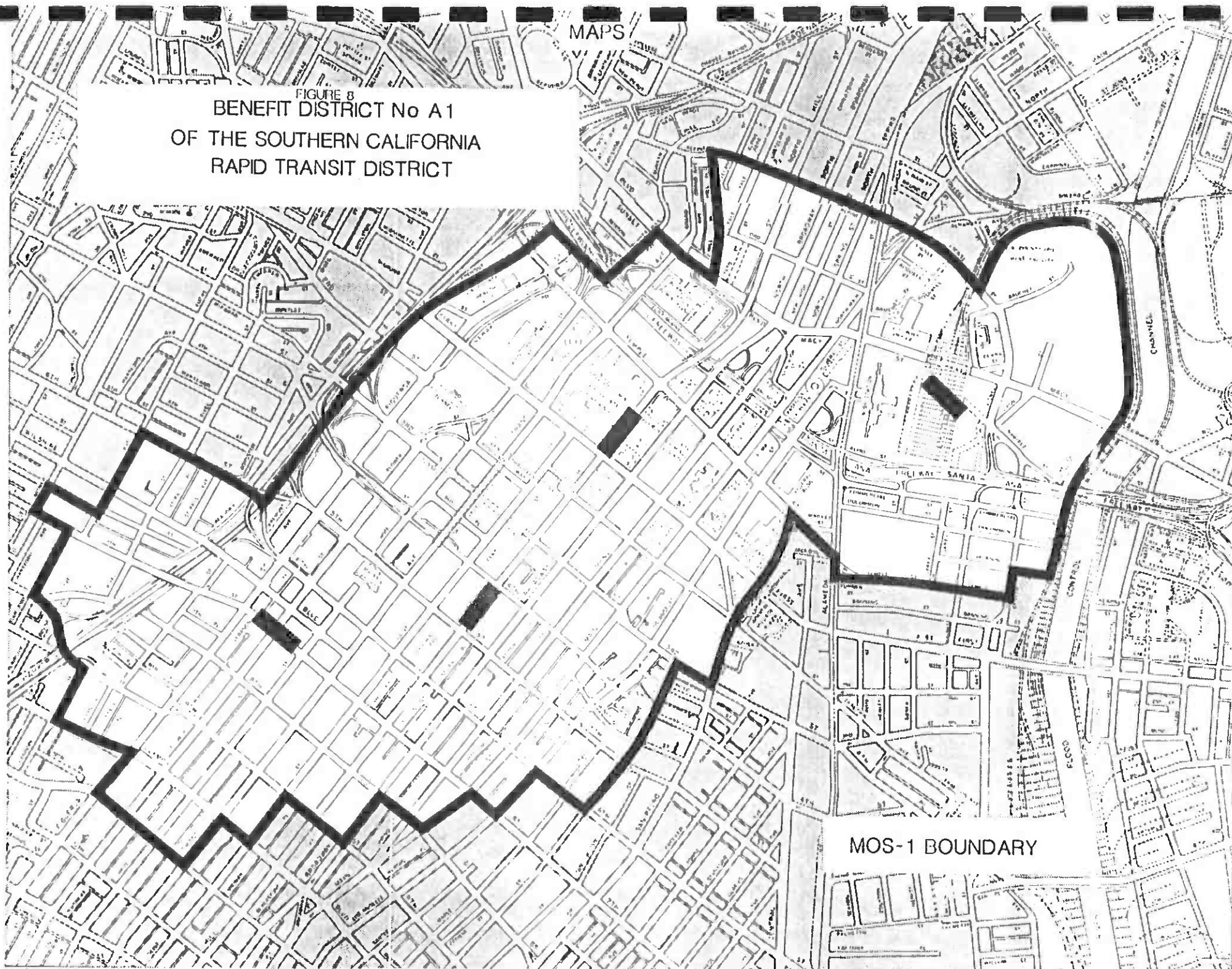
A master mailing list is maintained for all properties within the boundaries of the MOS-1 Benefit Assessment Districts as approved by the Southern California Rapid Transit District Board of Directors on July 11, 1985 (see Maps, pages 29 and 30). This mailing list is maintained in order to notify all owners of real property within those boundaries in the following circumstances:

- 7.0.1 CODE required mailings (see BENEFIT ASSESSMENT PUBLIC HEARING REQUIREMENTS, page 14).
- 7.0.2 Informational and notification mailings not required by CODE (see USE OF THE MASTER MAILING LIST FOR GENERAL MAILINGS OF BENEFIT ASSESSMENT RELATED INFORMATIONAL MATERIALS, page 31).

A record is included in the Main Benefit Assessment microcomputerized database for each owner of real property whose name and address appear on the last equalized assessment roll or are otherwise known to the District. The last equalized tax roll is the Los Angeles County Assessor's Secured Basic File and the Cross Reference file from which the Joint Consolidated Tax Bills are generated for the general mailing each October of the tax year. A list of all owners of real property within the boundaries of the benefit district is developed from the Los Angeles County Assessor's roll, updated annually from the last equalized tax roll, and is continuously updated utilizing other available information (see MAINTENANCE OF THE MASTER MAILING LIST, page 36). (Note: the annual update from the 1987-88 tax roll was not processed due to the deferral of assessments, but the updating resumed in 1988).

The Master Mailing List is a part of the Main Benefit Assessment database. A parcel record is maintained in this microcomputerized database for each property within the MOS-1 Benefit Assessment Districts. The record for each individual property is composed of a set of data fields. Eighteen of these data fields within each parcel record comprise the Master Mailing List. The parcel unique mapbook parcel number is used as the primary identification for each property. Additional fields in each record are used for sorting the main database into various sub-groups. For example, each parcel record includes codes to identify the benefit assessment district (either A-1 or A-2) within which each parcel is located. Data contained in five of the fields for each record provides information about the owner(s) of record and seven fields form the mailing address. Since 1987, a "final" field indicates the date of the most recent revision to the master mailing list data. (see MOS-1 BENEFIT ASSESSMENT DATABASE DIRECTORY, MASTER MAILING LIST, pages 33-35). Parallel data for Possessory Interest properties are included in the Master Mailing List. They are identified by the "8940"

FIGURE 8  
BENEFIT DISTRICT No A1  
OF THE SOUTHERN CALIFORNIA  
RAPID TRANSIT DISTRICT



MOS-1 BOUNDARY

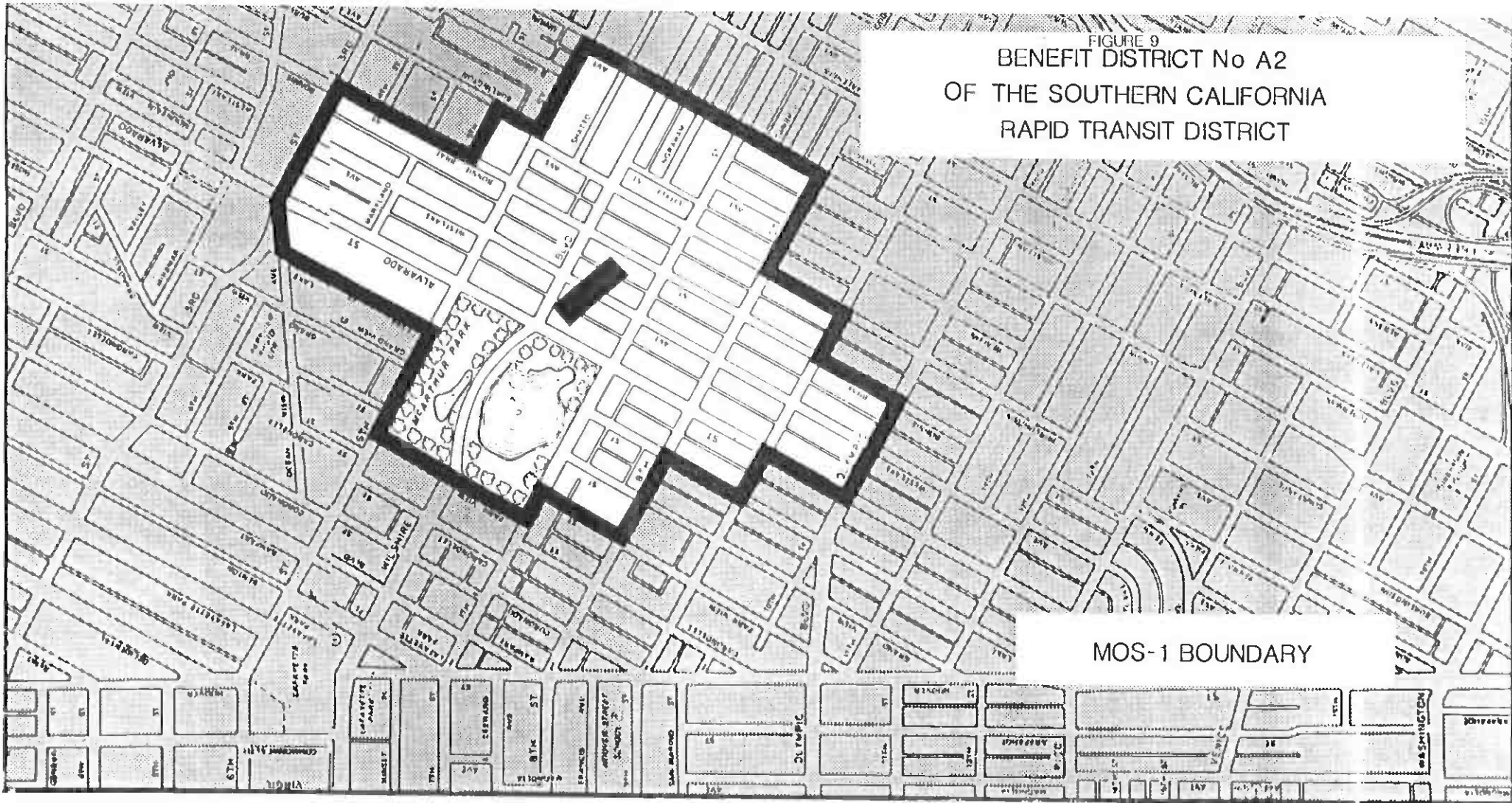


FIGURE 9  
BENEFIT DISTRICT No A2  
OF THE SOUTHERN CALIFORNIA  
RAPID TRANSIT DISTRICT

MOS-1 BOUNDARY

mapbook numbers.

## 7.1 USE OF THE MASTER MAILING LIST FOR GENERAL MAILINGS OF BENEFIT ASSESSMENT RELATED INFORMATIONAL MATERIALS

The master mailing list may be used for mailing information or other notification materials not related to Code required Public Hearings, to property owners within the Benefit Assessment Districts.

For example, on September 14, 1987, the Southern California Rapid Transit District sent an information mailing to all property owners in the MOS-1 Benefit Assessment Districts (A-1 and A-2). This mailing announced the SCRTD Board action of August 13, 1987, to set the benefit assessment rate at zero cents per square foot for the 1987-88 assessment year, as well as providing other specific information regarding the benefit assessment program. (See page 85, for a copy of the Letter of General Mailing ). The entire Master Mailing List, which includes all owners of real property and owners of assessable possessory interests in both the Central Business District (A-1) and the Wilshire-Alvarado Station Area (A-2), was used.

District policy requires that public notification for general mailings of Benefit Assessment related informational materials follow the requirements established by Code (see pages 2-11) as well as District policies. The code requirements and District policies regarding mailings include:

- 7.1.1 "Notice shall also be mailed at least 30 days prior to the hearing to all owners of real property within the boundaries of the proposed benefit district whose names and addresses appear on the last equalized assessment roll or are otherwise known to the Board of Supervisors of the County of Los Angeles or to the District (SCRTD)." (see CREATION OF AN INDIVIDUALIZED MAILING LIST, page 57).
- 7.1.2 Preparation of Notification Schedule (see TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS, page 19).
- 7.1.3 Follow-up mailings (see UPDATING ON THE BASIS OF UNDELIVERABLE MAIL, page 37).

- 7.1.4 Documentation (see DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS, page 74).
- 7.1.5 Documentation (see DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS, page 74).

FIGURE 10

MOS-1 BENEFIT ASSESSMENT DATABASE DIRECTORY MASTER MAILING LIST

Database Field <u>Field Name</u>	Type of <u>Field</u>	Length <u>of Field</u>
PARCELNO	Character	10 Bytes

Parcel number - The primary identification number assigned to each parcel of land, consisting of the complete mapbook, page, parcel character fields without intervening spaces (10 digits). The number is assigned by the Assessor's Office to facilitate locating every parcel on the assessment records and each parcel number is unique at any point in time.

PARCLNO_BK	Character	4 Bytes
------------	-----------	---------

Mapbook - The first 4 numbers of PARCEL NO above. Mapbook number assigned by the Assessor's Office. Mapbook numbers are added or dropped as the Assessor's Office sees the need. There is a special Thomas Brothers Map Guide for Los Angeles County indexed to the mapbook locations.

PRCLNO_PG	Character	3 Bytes
-----------	-----------	---------

Mapbook page - The fifth, sixth and seventh digits of PARCEL NO, above. Mapbook page number assigned by the Assessor's Office.

PRCLNO_PCL	Character	3 Bytes
------------	-----------	---------

Mapbook parcel - The last three numbers of PARCEL NO above. Mapbook parcel number assigned by the Assessor's Office. Parcel number range assigned indicates type of ownership for parcel as follows:

1 through 269	Indicates private ownership
270 through 299	Public Entity Properties Outside Their Boundaries
300 series	Unpatented Lands (federally-owned)
400 series	Orange Codes ( <sup>1</sup> )
500-799	Internal use codes
800 series	State Board of Equalization Assessed Properties
900 series	Exempt Properties (city and other public agencies ownership)

---

<sup>1</sup> Orange Codes identify property within a redevelopment district for which tax money does not go to the redevelopment district, i.e., the property is taxed as private property.



**BAD\_DIST** Character 2 Bytes

A two digit code indicating the Benefit Assessment District within which the parcel is located:

A1 = Central Business District  
A2 = Wilshire-Alvarado District

**MAIL-NUMB** Character 5 Bytes

The numerical part of the mailing address. This is the address used for generation of the mailing lists and address labels for all corresponding regarding the property.

**MAIL\_FRAC** Character 3 Bytes

The fractional part of the numerical portion of the mailing address, e.g., 1/2.

**MAIL\_DIR** Character 1 Byte

A one character indicator for the street direction associated with the mailing address, i.e., N = north, S = south, E = east, W = west.

**MAIL\_STRT** Character 32 Bytes

The street name associated with the mailing address, including such suffixes as 'ST', 'AVE', 'BLVD', etc.

**MAIL\_UNIT** Character 8 Bytes

The name or number of a subunit of the mailing address, e.g., 'APT 3'.

**MAIL\_CITY** Character 24 Bytes

The city and state of the mailing address.

**MAIL\_ZIP** Character 9 Bytes

The zip code of the mailing address.

**ASSESSOWN1** Character 32 Bytes

The name of the first owner assessee as of the previous lien date (March 1). Entered with the family name in the first position. See ASSESSOWN2 for the second owner, only two owner assessee names are provided for by the file.

ASSESSOVRFL Character 32 Bytes

This field contains any overflow from the first owner assessee field.

ASSESSP\_LG Character 5 Bytes

A character field containing any of the following codes indicating the type of special name present for the owner assessee:

DBA	Doing Business As
C/O	In Care Of
TR #	Trust Number
SPACES	

ASSESSP\_NM Character 32 Bytes

A special name assessee associated with the mailing address where tax bills are mailed. This name may be the same as the situs or property address; however, it may be the name of a Savings and Loan, Trust No. etc.

ASSESOWN2 Character 32 Bytes

The name and the second owner assessee as of the previous lien date (March 1). Entered with the family name in first position.

ADDUPDATE Character 8 Bytes

Date indicative of the last updating of property owner mailing address information. Entered as YY/MM/DD.

## 7.2 MAINTENANCE OF THE MASTER MAILING LIST

The master mailing list is reviewed and updated under the following conditions:

- 7.2.1 A new version Of Assessor's Secured Basic Files is received from the Assessor's Office (see ANNUAL UPDATING WITH LOS ANGELES ASSESSOR'S DATA, page 36).
- 7.2.2 The "Notice" is returned as undeliverable (see UPDATING ON THE BASIS OF UNDELIVERABLE MAIL, page 37).
- 7.2.3 Correction information from Appeals forms or other correspondence with the District (see UPDATING ON THE BASIS OF APPEALS FORMS AND OTHER CORRESPONDENCE, page 38).

## 7.3 ANNUAL UPDATING WITH LOS ANGELES ASSESSOR'S DATA

The main benefit assessment database is revised annually to reflect the latest data in the Los Angeles County Assessor's last equalized tax roll (see Database MANUALS). For the main mailing list data fields (see MOS-1 BENEFIT ASSESSMENT DATABASE DIRECTORY MASTER MAILING LIST, pages 33-35), the Assessor's data supersedes all previous data except in the following circumstances.

- 7.3.1 The address in the newly received Assessor's data file has been used previously for a mailing and the notice was returned as undeliverable. A corrected address was entered into the mailing list database according to the procedures outlined in UPDATING ON THE BASIS OF UNDELIVERABLE MAIL, page 37). Under these circumstances, the original corrections made to the address in the mailing list database are not changed.
- 7.3.2 Written correspondence has been received from the owner of record or his designated representative that another address is to be used for all correspondence related to the property (see UPDATING ON THE BASIS OF APPEALS FORMS AND OTHER CORRESPONDENCE, page 38).

7.3.3 A new owner of record is verified by District staff from other Assessor's records, but was not entered into the most recent Assessor's tape or microfiche received for updating the database (see UPDATING ON THE BASIS OF APPEALS FORMS AND OTHER CORRESPONDENCE, page 38).

7.3.4 Written confirmation of a change in possessory interest is received from the owner or representative for a property in city or other public agency ownership (see UPDATING ON THE BASIS OF APPEALS FORMS AND OTHER CORRESPONDENCE, page 38).

#### 7.4 UPDATING ON THE BASIS OF UNDELIVERABLE MAIL

Each time a mailing list is created and used to send "notice" to property owners, a small percentage of undeliverable pieces are returned. These returned pieces are reviewed and handled as follows:

7.4.1 When pieces are returned containing a forwarding address from the post office, the mailing list database address is corrected and the notice is re-mailed to the correct address as supplied by the Post Office (see PROCEDURES FOR HANDLING RETURNS, Section 8.1, page 39).

7.4.2 In the case of pieces returned with incomplete or undeliverable addresses with no forwarding address available from the post office, appeals forms and other correspondence with the district are reviewed for address corrections. If no information can be found from these sources, then telephone information, local telephone directories and other public sources are consulted for information on the correct, current address (see PROCEDURES FOR HANDLING RETURNS, Section 8.2, page 40).

7.4.3 In a small number of cases no forwarding address can be located. For these cases, the returned notice is retained as documentation of the attempt to send notice to the property owner (see PROCEDURES FOR HANDLING RETURNS, Section 8.2, page 41).

7.4.4 Send to situs address, of property is not vacant, and if not tried previously.

## 7.5 UPDATING ON THE BASIS OF APPEALS FORMS AND OTHER CORRESPONDENCE

Benefit Assessment Appeals Petitions and case files are reviewed. When a discrepancy occurs between the address in the database and the address indicated on the petition form or in other documents in the case file, the petitioner is consulted as to his correct mailing address. The address preferred by the petitioner is used in the mailing list database for all future correspondence. Any other correspondence received by the District which indicates a change or correction to the mailing address for a property owner is used to correct the main mailing list database as soon as practical.

- 7.5.1 Prepare a MAILING LIST UPDATE form (see page 42)
- 7.5.2 Attach a copy of any supporting correspondence to the form (see Samples A-F, pages 44-49)
- 7.5.3 Enter the change into the database, complete the bottom of the MAILING LIST UPDATE form (see page 42)
- 7.5.4 File the form in alphabetical order by property owner in the Mailing List hard copy black notebook

## 8.0 PROCEDURES FOR HANDLING RETURNS

Keep a tally of all returns for use in documentation (see DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS, page 74). Itemize as follows:

- o New address from Post Office
- o New address from other source
- o No new address available
- o Total # of Returned pieces

Other tallies to monitor are groups of returns from one address, e.g., commonly a group of returns will occur when a condominium managing office moves prior to the units being sold to individuals.

Locate correct address for forwarding returned mail.

### 8.1 POSTAL RETURN INSTRUCTIONS

Return address supplied by the Post Office (yellow stick-on label, see sample, page 51).

- o Type new envelope with the correct address according to the Post Office.
- o Xerox 2 copies of the old envelope with the correctly addressed envelope on the same page (see sample, page 56). Attach one of the copies to MAILING LIST UPDATE FORM when completed. File the second copy in the documentation file for the specific public hearing (see PUBLIC HEARING NOTIFICATION SUBJECT FILE, page 73).
- o Insert the complete set of original notification materials including the original envelope into the correctly addressed envelope and remail the notification materials.
- o Add property to DISPOSITION OF RETURNED MAIL list (see page 55).
- o Complete MAILING LIST UPDATE FORM (see page 42). Attach one xerox copy of both envelopes and file in alphabetical order by property owner in Mailing List hard copy black notebook.

- o Enter revision into the mailing list database and make notation of database entry on the MAILING LIST UPDATE FORM (see sample, page 42).
- o File the second copy of the envelopes with the old and new addresses with the tallies and other data on the mailing in the Notification Subject File (see PUBLIC HEARING NOTIFICATION SUBJECT FILE, page 73).

## 8.2 NO FORWARDING INSTRUCTIONS

Returned address not supplied by the Post Office. (Refer to Samples B through F, pages 45-49).

Proceed through steps in order until address correction is completed.

- o Complete any obvious editing or omission errors
  - zip code missing or incomplete refer to zip code directory
  - label damaged and/or illegible refer to hard copy listing or database
  - misprinted information and other obvious editing errors refer to hard copy listing or database
- o Use Mailing List hard copy black notebook update form file to verify that address is the most current known to the district. That is, no MAILING LIST UPDATE FORM is on file which would supercede the address on the returned mail.
- o Use hard copy listing or database to locate other parcels with the same owner of record with an acceptable address.
- o Use telephone books, telephone information, and other public records to identify address of owner of record.
- o Send to situs address, if improved previously, and never tried as a mailing address.

If the address is correctable.

- o Type new envelope with the correct address.

- o Xerox 1 copy of the old envelope with the correctly addressed envelope on the same page (see sample, page 56). Attach to MAILING LIST UPDATE FORM when completed. Indicate source of corrected address on the xerox copy and date of remailing. Document the remailing in the documentation file for the specific public hearing (see PUBLIC HEARING NOTIFICATION SUBJECT FILE, page 73).
- o Insert the complete set of original notification materials, including the original envelope, into the correctly addressed envelope and remail the notification.
  - Add property to DISPOSITION OF RETURNED MAIL list (see page 55).
  - Complete the MAILING LIST UPDATE FORM. Attach the copy of the old and new envelopes to the form and file in alphabetical order by property owner in Mailing List hard copy black notebook.
  - Enter revision into the mailing list database and make notation of database entry on the MAILING LIST UPDATE FORM (see page 42).
  - Note the remailing on the "Disposition of Returned Mail" form and with the tallies and other data on the mailing (see PUBLIC HEARING NOTIFICATION SUBJECT FILE, page 73).

If address is not correctable from available resources.

- o Add property to DISPOSITION OF RETURNED MAIL list (Page 55).
- o Xerox three to a page, all envelopes for which no corrected address can be located with the tallies and other data from the mailing in the subject file for the specific public hearing for which the notifications was sent (see PUBLIC HEARING NOTIFICATION SUBJECT FILE, page 73).



FIGURE 11

MAILING LIST UPDATE

OWNER: \_\_\_\_\_

DATE: \_\_\_\_\_

PARCEL NUMBER: \_\_\_\_\_

OLD ADDRESS: \_\_\_\_\_

NEW ADDRESS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

database- \_\_\_\_\_

database- \_\_\_\_\_

NEW OWNER DATA (if applicable):

OLD OWNER- \_\_\_\_\_

NEW OWNER- \_\_\_\_\_

database- \_\_\_\_\_

database- \_\_\_\_\_

SOURCE OF INFORMATION:

\_\_\_ RETURNED MAIL U.S. POST OFFICE

\_\_\_ APPEALS PETITION

\_\_\_ TELEPHONE DIRECTORY

\_\_\_ TELEPHONE CONTACT

\_\_\_ GPC RESEARCH

\_\_\_ OTHER

COMMENTS:

PREPARED BY: \_\_\_\_\_

DATE: \_\_\_\_\_

ENTERED INTO DATABASE: \_\_\_\_\_

DATE: \_\_\_\_\_

9.0 INDEX OF MAILING LIST UPDATE SAMPLES

Samples for various sources in finding and correcting addresses:

Sample A Returned Mail, attach the envelope or copy (see pages 44 and 51)

Sample B Telephone Contact (see sample B, page 45)

Sample C Appeals Petition, attach a copy of the petition with the supporting information (see sample C, page 46 and page 50)

Sample D Benefit Assessment Staff Research, attach information, if any (see sample D, page 47)

Sample E Telephone Directory (see sample E, page 48)

Sample F Other correspondence or letter from petitioner. Attach a copy of the letter and the envelope (see sample F, page 49)

SAMPLE A  
RETURNED MAIL

\* GEN MAILING  
SEPT 14, 1987

MAILING LIST UPDATE

OWNER: RODRIGUEZ, ENSOR & AIDA H.

DATE: Nov 30, 1987

PARCEL NUMBER: 5151-002-033

OLD ADDRESS: 121 S. Hope St  
LA 90012

NEW ADDRESS: 2405 RIDGEWAY RD  
SAN MARINO, CA  
91108-2118

data base- —

data base- MAIL LIST  
BADD 687

NEW OWNER DATA (if applicable):

Old Owner- \_\_\_\_\_  
data base- \_\_\_\_\_

New Owner- \_\_\_\_\_  
data base- \_\_\_\_\_

SOURCE OF INFORMATION:

- returned mail
- appeals petition
- telephone directory
- telephone contact
- GPC research
- other \_\_\_\_\_

COMMENTS: Re-return

PREPARED BY: 7

DATE: 11/30/87

ENTERED INTO DATA BASE: 7

DATE: 11/30/87

SAMPLE B  
TELEPHONE CONTACT

MAILING LIST UPDATE

OWNER: L.A. County Dept. of Real Estate Management

DATE: March 10

PARCEL NUMBER: 5408025900

OLD ADDRESS: 601 N. Vermont Ave  
L.A. Calif.  
90004

NEW ADDRESS: 550 S. Vermont Ave.  
Los Angeles, 90020

data base- mail.list dbf

data base- MAIL.LIST dbf

NEW OWNER DATA (if applicable):

Old Owner- \_\_\_\_\_  
data base- \_\_\_\_\_

New Owner- \_\_\_\_\_  
data base- \_\_\_\_\_

SOURCE OF INFORMATION:

returned mail       appeals petition       telephone directory  
 telephone contact       GPC research       other \_\_\_\_\_

COMMENTS:

738-2305

PREPARED BY: MS

DATE: March 10

ENTERED INTO DATA BASE: MS

DATE: 3/16/88

SAMPLE C  
APPEALS PETITION

MAILING LIST UPDATE

OWNER: Aitshuk, Joel & Perry et al

DATE: August 12, 1987

PARCEL NUMBER: 5148-020-001/003

OLD ADDRESS: 5335. LA ST.  
LA CA 9002

data base- BADD686 dbf

NEW ADDRESS: clo Selan and Selan  
5855 Topanga Canyon Bl  
ST. 500

WOODLAND HILLS CA 91064  
data base- BADD687 dbf

NEW OWNER DATA (if applicable):

Old Owner- \_\_\_\_\_

data base- \_\_\_\_\_

New Owner- \_\_\_\_\_

data base- \_\_\_\_\_

SOURCE OF INFORMATION:

returned mail

appeals petition

telephone directory

telephone contact

GPC research

other \_\_\_\_\_

COMMENTS:

PREPARED BY: Jack Ottway DATE: 8/10/87

ENTERED INTO DATA BASE: jo DATE: 8/10/87

SAMPLE D  
BENEFIT ASSESSMENT STAFF RESEARCH

MAILING LIST UPDATE

OWNER: Eggs, Eric

DATE: August 7 1987

PARCEL NUMBER: 5144-002-030

OLD ADDRESS: 621 N. Spring St.  
No. 606  
LA, CA 90014

data base- MAILUST.dbf

NEW ADDRESS: 621 S. Spring St.  
No. 626  
LA CA 90014

data base- BAD0687.dbf

NEW OWNER DATA (if applicable):

Old Owner- \_\_\_\_\_

New Owner- \_\_\_\_\_

data base- \_\_\_\_\_

data base- \_\_\_\_\_

SOURCE OF INFORMATION:

returned mail

appeals petition

telephone directory

telephone contact

GPC research

other \_\_\_\_\_

COMMENTS:

PREPARED BY: Jack Ottaway DATE: 8/13/87

ENTERED INTO DATA BASE: jo DATE: 8/13/87

SAMPLE E  
TELEPHONE DIRECTORY

\* GENERAL MAILING  
SEP. 14, 1987

MAILING LIST UPDATE

OWNER: EMISEL INTERNATIONAL

DATE: NOVEMBER 2, 1987

PARCEL NUMBER: 5144-015-044

OLD ADDRESS: 5780 WILSHIRE BL.

NEW ADDRESS: 2431 SANTA MONICA BLVD.

LOS ANGELES, CA.

LOS ANGELES, CA.

90036

90069

data base- \_\_\_\_\_

data base- BA00687 dbf

NEW OWNER DATA (if applicable):

Old Owner- \_\_\_\_\_

New Owner- \_\_\_\_\_

data base- \_\_\_\_\_

data base- \_\_\_\_\_

SOURCE OF INFORMATION:

returned mail

appeals petition

telephone directory

telephone contact

GPC research

other \_\_\_\_\_

COMMENTS:

PREPARED BY: GAD

DATE: 11/2/87

ENTERED INTO DATA BASE: GAD

DATE: 11/2/87

SAMPLE F  
LETTER FROM PETITIONER

MAILING LIST UPDATE

OWNER: Southern Pacific Land Co.  
c/o Property Tax Dept.

DATE: August 11, 1987

PARCEL NUMBER: 5409-021-002/011

OLD ADDRESS: 701 Mission St.  
San Francisco, CA  
94105

data base- MAILLIST.JLF

NEW ADDRESS: 201 Mission St.  
San Fran, CA 94105

data base- BADD186.dbf

NEW OWNER DATA (if applicable):

Old Owner- \_\_\_\_\_  
data base- \_\_\_\_\_

New Owner- c/o Property Tax Dept.  
data base- BADD689 dbf

SOURCE OF INFORMATION:

returned mail

appeals petition

telephone directory

telephone contact

GPC research

other letter attached  
from Petitioner

COMMENTS:

PREPARED BY: Jack Ottaway DATE: 8/11/87

ENTERED INTO DATA BASE: jo DATE: 8/13/87



(For Office Use Only)

Case No. A1-527-86

Date 5-22-87

FIGURE 12

BENEFIT ASSESSMENT APPEALS PETITION

Name of Property Owner Joel Altshule/Perry Altshule, et al

Address of Property Owner 533 South Los Angeles Street *This address was List*  
Los Angeles, CA 90013

Mailing Address (if different) c/o Selan & Selan  
5855 Topanga Canyon Blvd., Suite 500  
Woodland Hills, CA 91367

Telephone (818) 704-5900

Representative's name\* ROBERT E. SELAN, ESQ.

Address 5855 Topanga Canyon Boulevard, Suite 500  
Woodland Hills, CA 91367

Telephone (818) 704-5900

\* A written authorization from the property owner is required if the petition is made by a representative other than an attorney.

Address of the property 533 S. Los Angeles Street  
Los Angeles, CA 90013

Provide legal description of the property: 5148 - 020 - 001 00008  
or attach copy of property deed. Map Book Page Parcel No.  
Lot 15 BLK D

Map depicting the property's location must be attached.

Indicate the Benefit Assessment District in which your property is located. (refer to your property tax statement):

SCRID - CBD  SCRID - Hillside

FY 1986 SCRID benefit assessment \$ 3,241.00

AUTHORIZATION FOR REPRESENTATION:

THE OWNERS OF THIS PROPERTY, OR LEGAL REPRESENTATIVES OF THE OWNERS, HOWEVER NAMED, DESIGNATE THE MOUNTAIN LOS ANGELES HOMEOWNERS ASSOCIATION, INC., AS ITS AGENT FOR THE PURPOSE OF THIS OR OTHER ACTIVITIES AGAINST THE SOLIDWEN CALIFORNIA RAPID TRANSIT DISTRICT (SCRID) AS IT SPECIFICALLY RELATES TO ACTIONS AGAINST THE SPECIAL BENEFIT ASSESSMENT DISTRICT(S).

Signature: *[Handwritten Signature]*  
Date: March 12, 1987

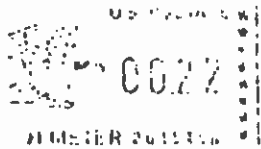
Southern California Rapid Transit District  
425 South Main Street, Los Angeles, California 90013



**RTD**

~~Handwritten scribbles~~

5151002033  
Ensor & Aida H. Rodriguez  
121 S. Hope Street  
Los Angeles, CA 90012



ROD 21 15088591 FWD TIME EXPD  
RODRIGUEZ  
2405 RIDGEWAY RD  
SAN MARINO, CA 91108-2118  
RETURN TO SENDER

Ann O'Dell, Planning.  
5-11-78

FIGURE 13

(For Office Use Only)

Case No. AI-290-86

Date 2/18/87

FIGURE 14

BENEFIT ASSESSMENT APPEALS PETITION

Name of Property Owner Southern Pacific Land Company

Address of Property Owner 201 Mission Street  
San Francisco, CA 94105 *Easton*  
*Assessor's*

Mailing Address (if different) As Above

Telephone (415) 974-4538

Representative's name\* L. W. Telford, General Attorney

Address 201 Mission Street  
San Francisco, CA 94105

Telephone (415) 974-4687

\* A written authorization from the property owner is required if the petition is made by a representative other than an attorney.

Address of the property Vignes and Lyon Streets

Provide legal description of the property: 5409 - 021 - 002  
or attach copy of property deed. Map Book Page Parcel No.

Map depicting the property's location must be attached.

Indicate the Benefit Assessment District in which your property is located. (refer to your property tax statement):

SCRTD - CBD X SCRTD - Wilshire

FY 1986 SCRTD benefit assessment \$ 9,344.00

In order for your petition to be processed, a check (made out to SCRTD) for \$50.00 must be attached to the front of this form.

# Southern Pacific Land Company

Pacific Gateway Building • 201 Mission Street • San Francisco, California 94105

RECEIVED

JUL 22 1987

PLANNING DEPT.  
AED

July 17, 1987

ADDRESS CHANGE

Please change your records immediately to reflect our mailing address as follows:

c/o Property Tax Department  
201 Mission Street, 3rd floor  
San Francisco, CA 94105

Sincerely,

*Richard I. Lundblade*

Richard I. Lundblade  
Director of Property Taxes

*for*

*Case AI-290  
AI-49  
Appeals Data  
BOSQ*

RECEIVED

FEB 24 1987

SCRID. SECRETARY

(For Office Use Only)

Case No. A1-308-86

Date 2-24-87

BENEFIT ASSESSMENT APPEALS PETITION

Name of Property Owner Joel Altshule/Perry Altshule et al  
 Address of Property Owner 533 South Los Angeles Street  
Los Angeles, CA 90013  
 Mailing Address (if different) c/o Selan & Selan  
5855 Topanga Canyon Boulevard, Suite 500  
Woodland Hills, CA 91367  
 Telephone (818) 704-5900  
 Representative's name\* ROBERT E. SELAN, ESQ.  
 Address 5855 Topanga Canyon Boulevard, Suite 500  
Woodland Hills, CA 91367  
 Telephone (818) 704-5900

\* A written authorization from the property owner is required if the petition is made by a representative other than an attorney.

Address of the property 530 South Main Street, Los Angeles, CA 90013

Rivara and Vignolo Tract

Provide legal description of the property: 5148 - 020 - 003 00008  
 or attach copy of property deed. Map Book Page Parcel No.

Lot 17, BLK D

Map depicting the property's location must be attached.

Indicate the Benefit Assessment District in which your property is located. (refer to your property tax statement):

SCRID - CBD

SCRID - Wilshire

FY 1986 SCRID benefit assessment \$ 8,400.00

Please check the appropriate amount attached:

**\$50<sup>00</sup>-**

FIGURE 17

DISPOSITION OF RETURNED MAIL

FOR PUBLIC NOTICE MAILED: \_\_\_\_\_

RE: \_\_\_\_\_

Prop. Own. Name	Parcel #	First Remailed (DATE)	Second Remailed (DATE)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

FIGURE 18

Southern California Rapid Transit District  
425 South Main Street, Los Angeles, California 90013



A2--5136 008 010  
Jacoby, Seymour G ET AL  
10587 Wilshire Boulevard Del Capri HTL  
Los Angeles, CA 90024-4505

Southern California Rapid Transit District  
South Main Street, Los Angeles, California 90013



A2 -- 5136 008 010  
JACOBY, SEYMOUR G ET AL  
10445 WILSHIRE BLVD  
NO 1904  
LOS ANGELES CA 90024



U.S. POSTAGE  
00.22  
HMETER 2633459

JACOBY 31080771 RETURN TO SENDER  
JACOBY  
10587 WILSHIRE BLVD DEL CAPRI HTL  
LOS ANGELES CA 90024-4505  
RETURN TO SENDER

Individualized Mailing



## 10.0 CREATION OF AN INDIVIDUALIZED MAILING LIST

A zip-code ordered mailing list is generated from the master mailing list database in order to forward necessary notification materials to all property owners or a specific sub-group of property owners for parcels located within the MOS-1 Benefit Assessment Districts. The group of property owners noticed by each mailing is defined by the type of proceeding for which notice is being given.

For each individual public hearing or informational mailing, the target group of properties to be noticed must be specified.

A working database containing only the targeted records is then created and sorted into zip-code order.

This working database, individually developed before each mailing, is used to generate the mailing labels and an archive copy of the mailing list. See DATABASE PROGRAM INDEX, page 61, for a list of prepared programs available.

### 10.1 MAILING LIST STEPS

- O Identify target district. The BAD\_DIST field identifies Benefit Assessment District (A-1 or A-2).
  - \_\_\_\_\_A-1 (use Makelist Program, see page 62)
  - \_\_\_\_\_A-2 (use Makelist Program, see page 62)
  - \_\_\_\_\_Both districts (use Tlist Program, see page 63)
- O Keep a tally of pieces mailed and returned (see MAILINGS FILE MEMORANDUM, page 76)
- O Prepare duplicate disk of mailing list for documentation and attach it to Certificate of Mailing

### 10.2 MAILING LABELS

Mailing labels are automatically generated from the database using a label generating program specially developed for use with the MOS-1 Benefit Assessment database formats.

The original label generating program discussed in Technical Memorandum 4.12.13 has been modified for use on the SCRTD Planning Library microcomputer with Toshiba printer. At present the library printer is the only high-speed printer capable of printing the labels within a reasonable time frame. The program has also been modified to the configuration required by the SCRTD mail room labeling machine. The Chesire labels are printed forty-four labels per page in four columns of 11 each. The A-1 district with approximately 2,500 labels takes approximately 2 1/2 hours to print. The mail room system cuts the paper labels and applies them to the envelopes by machine.

A label is generated for each parcel within the target group for the specific public hearing as defined by the Code. The mapbook sample parcel number is used on the label to identify each property noticed. The labels are formatted as follows:

10 digit mapbook parcel number  
Owner of record  
Mailing address of record

Give the mail room supervisor (in 1988, Brian Soto, the General Services Manager) several days advance notice of the mailing, so that she/he may schedule staff with appropriate training in use of the special equipment.

Labels, envelopes, and material to be inserted are transmitted to the SCRTD mail room (in the basement) who will address, stuff and send out. A Certificate of Mailing should be signed by the person responsible for mailing out the notifications.

### 10.3 PREPARATION FOR PRINTING LABELS

- O Develop a mailing list database which includes only targeted properties (see CREATION OF AN INDIVIDUALIZED MAILING LIST, page 57)
- O Sort mailing list into zip code order (see HOW TO SORT DATABASE FILE BY ZIP CODE, page 60)
- O Prepare Toshiba printer in library
  - o Load the adhesive-backed Series 21 label paper into the printer
  - o Check the alignment. The page perforation should be just below the top of the horizontal line indicators on the print head.

- o Load the prepared mailing list file into the system by restoring the file from backups (use either the dBASE command COPY or RESTORE as appropriate).
  - o Enter the dBASE III+ program.
  - o If the status bar is not set on, you may wish to set the status bar on. The status bar is the small screen which appears at the bottom of the monitor. It gives you information such as the name of the file in use and the record number of the address being printed. To activate the status bar, type in SET STATUS ON. Then press the return.
  - o Open the prepared mailing list database file (dBASE USE command).
  - o Run the MAINLAB program for printing labels (dBASE DO command) (see copy of MAINLAB.prg and associated SIDE.prg and BREAKLAB.prg programs, pages 64, 66 and 67).
  - o To print individual labels use the ONELAB.prg (dBASE DO command) (see copy of ONELAB.prg program, page 72)

#### 10.4 HOW TO HANDLE PAPER JAMS

- o Hit the escape key.
- o Type C to cancel program.
- o Type SET PRINT OFF.
- o Determine the "Parcelno" of the last valid label printed by examining the label printout.
- o Type ?PARCELNO to determine the parcel number of the current record position.
- o If the parcel number of the current record number is different than the parcel number of the last valid label, type LOCATE FOR PARCELNO='514407222'. This will position the record pointer to the correct location.
- o Align the paper.
- o Restart the program by typing DO MAINLAB.

## 10.5 HOW TO SORT DATABASE FILE BY ZIP CODE

- o Work through the dBASE III+ program
- o Open the working mailing list file
- o Sort by zip code using the following command:

```
sort on MAIL_ZIP,MAIL_STRT to NEWFILE
```

- o When sort is complete close working file; NEWFILE now contains mailing list file sorted in zip code order

## 11.0 DATABASE PROGRAM INDEX

All programs listed have been developed to run through the dBASE III+ program software.

MAKELIST.prg	Creates a mailing list in zip code order for one district.
TLIST.prg	Creates a mailing list in zip code order for any database used.
PRTLIST.prg	Prints a list of the mailing list in parcel number order for documentation.
MAINLAB.prg	Prints mailing labels from the database supplied.
SIDE.prg	Auxiliary program for MAINLAB.prg; contains printer commands.
BREAKLAB.prg	Auxiliary program for MAINLAB.prg; contains commands for formatting individual labels.
ONELBA.prg	Prints individual Avery labels for a mailing list database.

FIGURE 19

MAKELIST.PRG

**ERRATA:** THE DATABASE IS INCORRECTLY REFERRED TO AS THE COUNTY ASSESSOR'S DATABASE. IT IS ACTUALLY THE MOS-1 BENEFIT ASSESSMENT DATABASE (Also known as the Master or as abstracted, the Mailing List Database)

```
*
*                               *****
* MAKELIST.PRG
* WRITTEN BY C. DAVIS
* LATEST REVISION 7-29-87
* THIS PROGRAM CREATES A DATABASE TO BE USED BY THE MAINLAB.PRG
* THAT GENERATES THE BENEFIT ASSESSMENT HEARING'S MAILING LABELS.
* IT EXTRACTS THE NECESSARY FIELDS FROM THE COUNTY ASSESSOR'S
* DATABASE, DELETES THE APPROPRIATE RECORDS AND SORTS THE NEWLY-
* CREATED DATABASE INTO ZIP-CODE ORDER.
*                               *****
*
* CLEARS SCREEN
CLEAR
* ESTABLISHES NAMES OF MAILING-LIST DATABASE AND ASSOCIATED
* INDEX FILE
@ 7,0
ACCEPT "ENTER THE NAME OF THE MAIL LIST FILE YOU WISH TO ;
CREATE..." TO FILENAME1
@ 9,0
ACCEPT "ENTER THE NAME OF THE INDEX FILE THAT WILL BE CREATED..."
;
TO FILENAME2
@ 11,0
ACCEPT "WILL THIS MAILING LIST BE FOR DISTRICT A1 OR A2 ?" TO ;
DISTNAME
@ 13,0
ACCEPT "ENTER THE NAME OF THE CURRENT COUNTY ASSESSOR'S
DATABASE..;"
* CALLS MAIN COUNTY ASSESSOR'S FILE
USE &COUNTY
* COPIES THE NECESSARY FIELDS TO NEWLY-CREATED DATABASE
COPY FIELDS PARCELNO,BAD_DIST,MAIL_NUMB,MAIL_FRAC,MAIL_DIR, ;
MAIL_STRT,MAIL_UNIT,MAIL_CITY,MAIL_ZIP,ASSESOWN1,ASSESÖVRFL, ;
ASSESSP_LG,ASSESSP_NM,ASSESOWN2 TO &FILENAME1
USE &FILENAME1
* DELETES RECORDS FOR DISTRICT NOT USE FOR MAILING
DELETE FOR BAD_DIST<>"&DISTNAME"
PACK
* SORTS RECORDS IN ASCENDING ORDER OF ZIP CODES
INDEX ON MAIL_ZIP TO &FILENAME2
```

FIGURE 20

TLIST.PRG

```
*
*                               *****
* TLIST.PRG
* 3/29/88mg
*
* THIS PROGRAM CREATES A DATABASE TO BE USED BY THE MAINLAB.PRG
* THAT GENERATES THE BENEFIT ASSESSMENT HEARING'S MAILING LABELS.
* IT EXTRACTS THE NECESSARY FIELDS FROM THE MASTER BENEFIT
* ASSESSMENT DATABASE, DELETES THE APPROPRIATE RECORDS AND SORTS
* THE NEWLY-CREATED DATABASE INTO ZIP-CODE ORDER.
*                               *****
*
* CLEARS SCREEN
CLEAR
* ESTABLISHES NAMES OF MAILING-LIST DATABASE AND ASSOCIATED
* INDEX FILE
@ 7,0
ACCEPT "ENTER THE NAME OF THE MAIL LIST FILE YOU WISH TO ;
CREATE..." TO FILENAME1
@ 9,0
ACCEPT "ENTER THE NAME OF THE INDEX FILE THAT WILL BE
CREATED..."; TO FILENAME2
@ 13,0
ACCEPT "ENTER THE NAME OF THE CURRENT MASTER BENEFIT ASSESSMENT
DATABASE..";
* CALLS MASTER BENEFIT ASSESSMENT FILE
USE &COUNTY
* COPIES THE NECESSARY FIELDS TO NEWLY-CREATED DATABASE
COPY FIELDS PARCELNO,BAD_DIST,MAIL_NUMB,MAIL_FRAC,MAIL_DIR, ;
MAIL_STRT,MAIL_UNIT,MAIL_CITY,MAIL_ZIP,ASSESOWN1,ASSESOVRFL, ;
ASSESSP_LG,ASSESSP_NM,ASSESOWN2 TO &FILENAME1
USE &FILENAME1
PACK
* SORTS RECORDS IN ASCENDING ORDER OF ZIP CODES
INDEX ON MAIL_ZIP, MAIL_STRT TO &FILENAME2
```

FIGURE 21

MAINLAB.PRG

ERRATA: THE DATABASE IS INCORRECTLY REFERRED TO AS THE COUNTY ASSESSOR'S DATABASE. IT IS ACTUALLY THE MOS-1 BENEFIT ASSESSMENT DATABASE (Also known as the Master or as abstracted, the Mailing List Database).

```
***** MAINLAB.PRG *****
* written by C. Davis, latest revision 7-30-87
*
* This is the main label program used to print mailing labels
* from information provided by the assessor's database. The
program
* utilizes a subsidiary database of name and address fields from
the
* assessor's database.
*
* This program utilizes 2 auxiliary programs, Breaklab and Side.
*
* Breaklab is the main program that reformats the respective name
* and address fields into a coherent label.
*
* The Side program positions the printer at the next column
* following the printing of a column of labels.
*
SET PRINT ON
* PRINTER CONTROL SEQUENCE FOR 8 LINES PER INCH
??CHR(27)+CHR(76)+CHR(48)+CHR(54)
EJECT
EJECT
SET PRINT OFF
DO WHILE .NOT. EOF()
WIDEPAGE=1
SET MARGIN TO 4
LEFTMAR=4
  DO WHILE WIDEPAGE<5
CTPAGE=1
* PRINTS FIRST COLUMN OF LABELS
  DO WHILE CTPAGE<12 .AND. .NOT. EOF()
SET PRINT ON
STORE PROW() TO BEGROW
* CALLS LABEL PRINTING PROGRAM TO PRINT INDIVIDUAL LABELS
DO BREAKLAB
STORE PROW() TO ENDROW
DIFFROW=ENDROW-BEGROW
* ADDS TRAILING BLANK ROWS SO EACH LABEL HAS EXACTLY 8 ROWS
  DO WHILE DIFFROW>0.AND.DIFFROW<8
?
DIFFROW=DIFFROW+1
  ENDDO
```



```
CTPAGE=CTPAGE+1
SKIP
  ENDDO
  IF WIDEPAGE<4 .AND. .NOT. EOF()
DO SIDE
  ENDF
LEFTMAR=LEFTMAR+42
SET MARGIN TO LEFTMAR
WIDEPAGE=WIDEPAGE+1
  ENDDO
ENDDO
SET MARGIN TO 0
EJECT
EJECT
SET PRINT OFF
```

FIGURE 22

SIDE.PRG

ERRATA: THE DATABASE IS INCORRECTLY REFERRED TO AS THE COUNTY ASSESSOR'S DATABASE. IT IS ACTUALLY THE MOS-1 BENEFIT ASSESSMENT DATABASE (Also known as the Master or as abstracted, the Mailing List Database).

```
*                ***** SIDE.PRG *****
* This auxiliary program is called by the Mainlab.prg to send 88
* reverse line feeds to the printer to print successive
* columns of labels.
* written by C. Davis, latest revision 6-5-87.
*
set print on
ctline=1
do while ctline<89
* printer control sequence for reverse line feeds on the Toshiba
* printers.
?? chr(27)+chr(10)
ctline=ctline+1
enddo
set print off
RETURN
```

FIGURE 23

BREAKELAB.PRG

ERRATA: THE DATABASE IS INCORRECTLY REFERRED TO AS THE COUNTY ASSESSOR'S DATABASE. IT IS ACTUALLY THE MOS-1 BENEFIT ASSESSMENT DATABASE (Also known as the Master or as abstracted, The Mailing List Database).

```
*****BREAKLAB.PRG*****
* Auxiliary program called by the main label program to print
* individual labels from information originating from the
county
* assessor's database.
* written by C. Davis, latest revision 6-29-87
* Note: This program exceeds the byte-space requirement to
be edited
* in the dbase editor. You may use the Wordstar editor.
*
SET TALK OFF
SET ECHO OFF
?PARCELNO
STORE AT(' ', ' ', ASSESOWN1) TO COMMA
STORE AT(' ', ' ', ASSESOVRFL) TO COMMA2
STORE AT(' ', ' ', ASSESOWN2) TO COMMA3
STORE AT(' AND ', ASSESOWN1) TO PLUS
STORE AT(' ET AL ', ASSESOWN1) TO ANDALL
STORE AT(' JR ', ASSESOWN1) TO JUNIOR
STORE AT(' TR ', ASSESOWN1) TO TRUST
STORE AT(' INC ', ASSESOWN1) TO CORP
STORE AT(' INC ', ASSESOVRFL) TO OVRCORP

DO CASE
CASE COMMA=0.AND.PLUS=0
?LTRIM(TRIM(ASSESOWN1))

CASE COMMA=0.AND.PLUS<>0
?LTRIM(TRIM(ASSESOWN1))

CASE COMMA<>0.AND.ANDALL<>0
?LTRIM(TRIM(SUBSTR(ASSESOWN1, COMMA+1, (ANDALL+1) - (COM-
MA+1))))+" ";
+SUBSTR(ASSESOWN1, 1, COMMA-1)+" "+"ET AL"+" ";
+LTRIM(SUBSTR(ASSESOWN1, ANDALL+6, 32))

CASE COMMA<>0.AND.JUNIOR<>0
?TRIM(SUBSTR(ASSESOWN1, COMMA+1, (JUNIOR+1) - (COMMA+1))))+" ";
+SUBSTR(ASSESOWN1, 1, COMMA-1)+" "+"JR"

CASE COMMA<>0.AND.TRUST<>0
?TRIM(SUBSTR(ASSESOWN1, COMMA+1, (TRUST+1) - (COMMA+1))))+" ";
+SUBSTR(ASSESOWN1, 1, COMMA-1)+" "+"TR"
```

```
    CASE COMMA<>0.AND.PLUS=0.AND.CORP=0
    ?LTRIM(TRIM(SUBSTR(ASSESOWN1,COMMA+1,32)))+ " ";
    +SUBSTR(ASSESOWN1,1,COMMA-1)
```

```
    CASE COMMA<>0.AND.CORP<>0
    ?LTRIM(TRIM(ASSESOWN1))
```

```
    CASE COMMA<>0.AND.PLUS<>0.AND.LEN(TRIM(ASSESOWN2))<>0;
    .OR. LEN(TRIM(ASSESOVRFL))<>0
    * 'SINGLE NAME' CASE: CONVERTS "DOE,JOHN AND" TO "JOHN DOE &"
    ?TRIM(SUBSTR(ASSESOWN1,COMMA+1,PLUS-(COMMA+1)));
    +" "+SUBSTR(ASSESOWN1,1,COMMA-1)+" "+"&"
```

```
    CASE COMMA<>0.AND.PLUS<>0.AND.LEN(TRIM(ASSESOVRFL))=0
    * 'DOUBLE NAME' CASE: CONVERTS "DOE,JOHN AND MARY" TO "JOHN &
    * MARY DOE"
    ?TRIM(SUBSTR(ASSESOWN1,COMMA+1,PLUS-(COMMA+1)));
    +" "+"&"+" "+LTRIM(TRIM(SUBSTR(ASSESOWN1,PLUS+3,32)));
    +" "+SUBSTR(ASSESOWN1,1,COMMA-1)
    ENDCASE
```

```
    * FORMATS CASES WHERE ASSESOVRFL FIELD IS NON-BLANK
    IF LEN(TRIM(ASSESOVRFL))<>0
    IF AT(', ',ASSESOVRFL)>0.AND.OVRCORP=0
    ?LTRIM(TRIM(SUBSTR(ASSESOVRFL,COMMA2+1,32)))+ " "+;
    SUBSTR(ASSESOVRFL,1,COMMA2-1)
    ELSE
    ?LTRIM(TRIM(ASSESOVRFL))
    ENDIF
    ENDIF
```

```
    * FORMATS CASES WHERE THE ASSESOWN2 FIELD IS NON-BLANK
    IF LEN(TRIM(ASSESOWN2))<>0
    IF AT(', ',ASSESOWN2)=0
    ?LTRIM(TRIM(ASSESOWN2))
    ELSE
    ?LTRIM(TRIM(SUBSTR(ASSESOWN2,COMMA3+1,32)))+ " ";
    +SUBSTR(ASSESOWN2,1,COMMA3-1)
    ENDIF
    ENDIF
```

```
    * FORMATS CASES WHERE ASSESSP_LG AND ASSESSP_NM ARE NON-BLANK
    * AND PREVENTS PRINTING OF C/O AND ATTN TWICE WHEN THEY
    APPEAR
    * IN BOTH ASSESSP_LG AND ASSESSP_NM FIELDS.
```

```
    IF LEN(TRIM(ASSESSP_NM))<>0.OR.LEN(TRIM(ASSESSP_LG))<>0
    STORE AT('C/O',ASSESSP_NM) TO CARENOM
    STORE AT('ATTN',ASSESSP_NM) TO ATTNOM
    DO CASE
    CASE CARENOM<>0.OR.ATTNNOM<>0
```

```

?TRIM(ASSESSP_NM)
  CASE LEN(TRIM(ASSESSP_LG))=0.AND.LEN(TRIM(ASSESSP_NM))<>0
?TRIM(ASSESSP_NM)
  CASE LEN(TRIM(ASSESSP_LG))<>0.AND.(CARENOM=0.OR.ATTNNOM=0);
  .AND.LEN(TRIM(ASSESSP_NM))<>0
?TRIM(ASSESSP_LG)+" "+TRIM(ASSESSP_NM)
ENDCASE
ENDIF

DO CASE
  CASE VAL(MAIL_NUMB)<>0
?LTRIM(STR(VAL(MAIL_NUMB)))
  CASE VAL(MAIL_NUMB)=0
* CONDITION FOR P O BOX ADDRESSES AND NO MAIL NUMBERS
?LTRIM(TRIM(MAIL_STRT))
ENDCASE

IF LEN(TRIM(MAIL_FRAC))<>0
??" "+MAIL_FRAC
ENDIF

IF LEN(TRIM(MAIL_DIR))<>0
??" "+MAIL_DIR+"."
ENDIF

STORE SUBSTR(MAIL_STRT,1,1) TO MAIL11
STORE SUBSTR(MAIL_STRT,1,3) TO MAIL13
STORE SUBSTR(MAIL_STRT,3,1) TO MAIL31
STORE SUBSTR(MAIL_STRT,3,10) TO MAIL310
STORE SUBSTR(MAIL_STRT,4,10) TO MAIL410

DO CASE
  CASE SUBSTR(MAIL_STRT,1,2)="00".AND. VAL(MAIL_STRT)>3
??" "+SUBSTR(MAIL_STRT,3,1)+"TH"+" "+LTRIM(TRIM(MAIL410))
* CONVERTS "009" ST TO "9TH ST"
  CASE VAL(MAIL13)>3.AND.VAL(MAIL13)<10.AND.AT('TH
',MAIL_STRT)<>0
??" "+MAIL11+"TH"+" "+LTRIM(TRIM(MAIL410))
  CASE VAL(MAIL13)>3.AND.VAL(MAIL13)<10
??" "+MAIL11+"TH"+" "+LTRIM(TRIM(MAIL310))
  CASE
VAL(MAIL13)>10.AND.VAL(MAIL13)<1000.AND.VAL(MAIL_NUMB)<>0
??" "+TRIM(MAIL13)+"TH"+" "+LTRIM(TRIM(MAIL410))
  CASE AT('001 ST',MAIL_STRT)<>0
??" "+MAIL31+"ST"+" "+LTRIM(TRIM(SUBSTR(MAIL_STRT,4,32)))
  CASE AT('1ST ST',MAIL_STRT)<>0
??" "+MAIL11+"ST"+" "+LTRIM(TRIM(SUBSTR(MAIL_STRT,4,32)))
  CASE VAL(MAIL13)=1
??" "+MAIL11+"ST"+" "+LTRIM(TRIM(SUBSTR(MAIL_STRT,3,32)))
  CASE AT('002 ',MAIL_STRT)<>0
??" "+MAIL31+"ND"+" "+LTRIM(TRIM(MAIL410))
  CASE VAL(MAIL13)=2

```

```

??" "+LTRIM(MAIL11)+"ND"+" "+TRIM(MAIL310)
  CASE MAIL31="3".OR.(AT('RD ',MAIL_STRT)<>0.AND.;
  VAL(MAIL_STRT)=3)
??" "+MAIL31+"RD"+" "+LTRIM(TRIM(MAIL410))
  CASE VAL(MAIL13)=3
??" "+LTRIM(MAIL11)+"RD"+" "+TRIM(MAIL310)
  CASE VAL(MAIL_NUMB)>0.AND.VAL(MAIL_STRT)=0
??" "+LTRIM(TRIM(MAIL_STRT))
ENDCASE

IF LEN(TRIM(MAIL_UNIT))<>0
  IF SPACE(1)$MAIL_UNIT
* REMOVES EXCESS BLANKS BETWEEN WORDS IN MAIL_UNIT FIELD.
FIRSTUNIT="1"
COUNTUNIT=1
  DO WHILE LEN(TRIM(FIRSTUNIT))=LEN(FIRSTUNIT)
  STORE SUBSTR(MAIL_UNIT,1,COUNTUNIT) TO FIRSTUNIT
  COUNTUNIT=COUNTUNIT+1
  ENDDO
  STORE SUBSTR(MAIL_UNIT,COUNTUNIT,8) TO LASTUNIT
??" "+LTRIM(FIRSTUNIT)+LTRIM(TRIM(LASTUNIT))
  ELSE
* HANDLES CASES WHERE MAIL_UNIT FIELD CONTAINS NO SPACES
??" "+MAIL_UNIT
  ENDIF
ENDIF

IF VAL(SUBSTR(MAIL_CITY,12,12))=0
?LTRIM(TRIM(MAIL_CITY))
ELSE
* PREVENTS PRINTING OF 2 DIGIT CODE FOR ADDRESSES ESTABLISHED
* BEFORE ZIP CODES WERE INITIATED.
?LTRIM(TRIM(SUBSTR(MAIL_CITY,1,12)))+ " ";
+LTRIM(TRIM(SUBSTR(MAIL_CITY,15,9)))
ENDIF
IF VAL(SUBSTR(MAIL_ZIP,6,4))=0
* DELETES TRAILING ZEROS IF LAST 4 DIGITS OF ZIP CODE
* ARE BLANK
??" "+LTRIM(TRIM(SUBSTR(MAIL_ZIP,1,5)))
ELSE
??" "+LTRIM(TRIM(MAIL_ZIP))
ENDIF

RETURN

```

FIGURE 24

PRTLST.PRG

**ERRATA:** THE DATABASE IS INCORRECTLY REFERRED TO AS THE COUNTY ASSESSOR'S DATABASE. IT IS ACTUALLY THE MOS-1 BENEFIT ASSESSEMNT DATABASE (Also known as the Master or, as abstracted, the Mailing List Database).

```
*****PRTLST.PRG*****
*****Written by C. Davis*****
*****Latest Revision 7-30-87*****
* Program to print list of mailing in alph order for
* file folder.
*
SET TALK OFF
SET ECHO OFF
CLEAR
@10,0
ACCEPT "PLEASE PROVIDE NAME OF CONDENSED ASSESSOR'S FILE..." TO ;
NAME
@12,0
ACCEPT "PLEASE PROVIDE NAME OF INDEX FILE TO BE CREATED..." TO ;
NAMINDEX
SET SAFETY OFF
USE &NAME
INDEX ON PARCELNO TO &NAMINDEX
SET PRINT ON
* PRINTER CONTROL SEQUENCE FOR 8 LINES PER INCH
?CHR(027)+CHR(038)+CHR(108)+CHR(056)+CHR(068)
CTPAGE=1
DO WHILE .NOT. EOF()
* LOOP TO PRINT FULL PAGE OF LABELS
DO WHILE PROW()<71 .AND. .NOT.EOF()
DO BREAKLAB
SKIP
?
ENDDO
?
* COUNTER FOR PAGE NUMBERING
?SPACE(20)+"page"+" "+LTRIM(STR(CTPAGE))
EJECT
CTPAGE=CTPAGE+1
ENDDO
SET PRINT OFF
SET SAFETY ON
SET ECHO ON
SET TALK ON
```

FIGURE 25

ONELAB.PRG

ERRATA: THE DATABASE IS INCORRECTLY REFERRED TO AS THE COUNTY ASSESSOR'S DATABASE. IT IS ACTUALLY THE MOS-1 BENEFIT ASSESSMENT DATABASE (Also known as the Master or as abstracted, the Mailing List Database).

\* ONELAB.PRG  
\* written by C. Davis, latest revision 7-30-87  
\* This program prints individual Avery labels of the condensed assessor's file.  
\* Make sure the printer is aligned before executing program.  
\*  
SET PRINT ON  
SET MARGIN TO 0  
DO BREAKLAB  
SET PRINT OFF



Documentation

**MTA LIBRARY**

12.0 PUBLIC HEARING NOTIFICATION SUBJECT FILE

The PUBLIC HEARING NOTIFICATION SUBJECT FILE is the documentation of compliance with Code requirements and District policy for each public hearing. A packet of the notification materials and the mailing lists is assembled and filed according to the type of notification and then according to the Public Hearing date, most recent date on top.

The types of notification are as follows:

- o Establishment of the Benefit Assessment District
- o Bond Hearings
- o Benefit Assessment Appeals Public Hearings
- o General Mailings

### 13.0 DOCUMENTATION FOR BENEFIT ASSESSMENT PUBLIC NOTICE MAILINGS

Compile all information pertaining to the notification process as each portion of the process is occurring. There are four basic phases of the process which require documentation.

- o Preparation
- o Publication and mailing
- o Returns and remailing
- o Tallies and statistics

#### 13.1 PREPARATION

- o Create a file and title the file folder with the date of the mailing and an identifying name for the notification.
- o Note the basis for the notification (see BENEFIT ASSESSMENT PUBLIC HEARING REQUIREMENTS, page 14).
- o Insert copy of the TIMELINE prepared for the specific notification (see TIMELINES FOR BENEFIT ASSESSMENT PUBLIC NOTICE REQUIREMENTS, page 19).

#### 13.2 PUBLICATION AND MAILING

- o Insert a copy of published notice of the Public Hearing along with a list of dates and place of publication in the file (see samples, pages 25, 26 and 27)
- o Place a copy of the NOTIFICATION LETTER with any attachments into the file
- o Place archive copy of the mailing list disk in the file and attach completed Certificate of Mailing Form.

### 13.3 RETURNS AND REMAILING

- o Place copies of materials generated by processing returns into the file (see PROCEDURES FOR HANDLING RETURNS, page 39).
  - o DISPOSITION OF RETURNED MAIL list (see page 55)
  - o Copy envelopes (three to a page, two sided) from returned mail for which no forwarding address could be located.

### 13.4 TALLIES AND STATISTICS

- o Fill out form (MAILINGS FILE MEMORANDUM, see page 76) and place in file
- o Throw away any draft information or working notes.

FIGURE 26

MAILINGS FILE MEMORANDUM

MAILING DATE:

SUBJECT:

NOTIFICATION TYPE:

PUBLIC HEARING:

TOTAL PIECES MAILED:

CENTRAL BUSINESS DISTRICT, DISTRICT A1

WILSHIRE ALVARADO DISTRICT, DISTRICT A2

PIECES RETURNED:

REASONS:

TOTAL PIECES FORWARDED

TOTAL PIECES UNABLE TO FORWARD

-----  
PIECES FORWARDED BASED ON THE FOLLOWING INFORMATION:

POST OFFICE RECORDS:

APPEALS CASE or OTHER CORRESPONDENCE:

PHONE INFORMATION or LISTINGS:

OTHER STAFF RESEARCH or FIELD SURVEY:

Prepared by \_\_\_\_\_ Date \_\_\_\_\_

FIGURE 27

HOW TO DO CALCULATIONS FOR THE MAILINGS FILE MEMORANDUM

MAILING DATE:

SUBJECT:

NOTIFICATION TYPE:

PUBLIC HEARING:

TOTAL PIECES MAILED: a

CENTRAL BUSINESS DISTRICT, DISTRICT A1  
PRIVATE OWNERSHIP:

WILSHIRE ALVARADO DISTRICT, DISTRICT A2  
PRIVATE OWNERSHIP:

POSSESSORY INTEREST:

GOVERNMENT AGENCIES:

	<u>#</u>	<u>%</u>
PIECES RETURNED:	b	b/a * 100

REASONS:

TOTAL PIECES FORWARDED	c	c/b * 100
------------------------	---	-----------

TOTAL PIECES UNABLE TO FORWARD	d	d/b * 100
--------------------------------	---	-----------

-----  
PIECES FORWARDED BASED ON THE FOLLOWING INFORMATION:

	<u>#</u>	<u>%</u>
POST OFFICE RECORDS:	e	e/c * 100

APPEALS CASE or OTHER CORRESPONDENCE:	f	f/c * 100
---------------------------------------	---	-----------

PHONE INFORMATION or LISTINGS:	g	g/c * 100
--------------------------------	---	-----------

OTHER STAFF RESEARCH or FIELD SURVEY:	h	h/c * 100
---------------------------------------	---	-----------

Prepared by \_\_\_\_\_ Date \_\_\_\_\_

14.0 SAMPLE INDEX OF LETTER TO PROPERTY OWNERS

Notice of Public Hearing Regarding Benefit Assessment (see PUBLIC HEARING APPEALS CASE, sample A, page 79)

Notice of Public Hearing Regarding Benefit Assessment District Bonds (see BOND HEARING, sample B, page 80)

Notice of Public Hearing Regarding Benefit Assessment District (see CBD DISTRICT HEARING, samples C and D, pages 81, 82, 83, 84)

General Information Mailing Regarding Benefit Assessment District (see GENERAL MAILING, sample E, page 85)



SAMPLE A

PUBLIC HEARING APPEALS CASE

RTD

NOTICE OF PUBLIC HEARING REGARDING BENEFIT ASSESSMENT APPEALS CASE A1-47-86

Dear Property Owner:

This notice is intended to inform you, a property owner within Metro Rail Benefit Assessment District A-1, that a hearing officer appointed by the Board of Directors of the Southern California Rapid Transit District (SCRTD) intends to hold a hearing, at the request of the below named property owner, on the following benefit assessment appeals case:

<u>Hearing No.</u>	<u>Case No.</u>	<u>Property Owner</u>	<u>Property Address</u>
H86-1	A1-47-86	Bruce Manley - Manley Oil Company	410 Center Street

Section 33000 et seq. of the California Public Utilities Code authorizes a hearing by the SCRTD Board or its appointed hearing officer when a property owner has petitioned to exclude his or her property from assessment because the property is not benefitted or to reduce the assessment because it exceeds the benefit to the property. The hearing will take place on Monday, July 13, 1987 at 9 a.m. in the Board Room on the second floor of the SCRTD Headquarters Building at 425 South Main Street, Los Angeles.

Any correspondence concerning the hearing should specify the hearing number and be addressed to:

Planning Department  
Benefit Assessment Office  
Southern California Rapid Transit District  
425 South Main Street - 5th Floor  
Los Angeles, CA 90013

Attn: Hearing No. H86-1

Any questions concerning the hearing should be directed to the Benefit Assessment Office at (213) 237-2125 or 237-2129. At your request, you may have your name placed on a mailing list for further information about this hearing.

Southern California Rapid Transit District

John A. Dyer  
General Manager





**RTD**

Jan Hall  
Director & President

SAMPLE B  
BOND HEARING

NOTICE OF PUBLIC HEARING REGARDING  
RESOLUTION OF THE BOARD OF DIRECTORS OF THE  
SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
TO ISSUE BENEFIT ASSESSMENT DISTRICT BONDS

Dear Property Owner:

This notice is intended to inform you, the property owner, that the Southern California Rapid Transit District (SCRTD) intends to issue Benefit Assessment District bonds for the purpose of financing, in part, the construction of the rail rapid transit stations within Benefit Assessment Districts A1 and A2 of SCRTD. Our records indicate that your property is located within the boundaries of one of these Districts.

A public hearing to allow interested persons to comment on the proposed issuance of Benefit Assessment District Bonds will take place at:

LOCATION: SCRTD Headquarters Building, Board Room  
425 South Main Street - Second Floor  
Los Angeles, California 90013

DATE: Thursday, May 14, 1987

TIME: 1:00 P.M.

At the public hearing, the resolution to incur bonded indebtedness will be presented. The issuance of bonds, in one or more series, with a maximum aggregate principal amount of \$187 million for Benefit Assessment District A1 and \$13 million for Benefit Assessment District A2 will be considered. Interested persons may appear at the hearing and present matters material to the items set forth in the resolution. Persons unable to attend the hearing may submit written testimony through 5:00 P.M., Thursday, May 14, 1987, the close of public record. Correspondence should be addressed to:

Office of the District Secretary  
Southern California Rapid Transit District  
425 South Main Street - Second Floor  
Los Angeles, California 90013

Attn: District Bonding

Southern California Rapid Transit  
District

A handwritten signature in cursive script, appearing to read "Jan Hall".

By: Jan Hall  
Director & President

Dated: April 1, 1987



SAMPLE C

CBD DISTRICT HEARING

NOTICE OF PUBLIC HEARING REGARDING  
RESOLUTION OF INTENT OF THE BOARD OF DIRECTORS OF  
THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
TO FORM BENEFIT ASSESSMENT DISTRICT

Dear Property Owner:

This notice is to inform you, the property owner, that the Southern California Rapid Transit District (SCRTD) intends to establish a Benefit Assessment District (for the Central Business District) and to levy a special benefit assessment on real property therein for the purpose of financing, in part, the construction of rail transit stations and rail transit related facilities within the Benefit Assessment District. Your property is located within the boundaries of the proposed Benefit Assessment District.

A public hearing regarding the Resolution of Intent of the Board of Directors of SCRTD to form the Benefit Assessment District will be held at:

location: SCRTD's Headquarters Building, Board Room  
2nd Floor  
425 South Main Street  
Los Angeles, California 90013

on: Thursday, January 24, 1985

time: 9:30 A.M.

The rail transit stations within the proposed Benefit Assessment District are a part of the first segment of the San Fernando Valley to Downtown Los Angeles Metro Rail Project.

The boundaries of the proposed Benefit Assessment District are shown on the attached map. The Resolution of Intent of the Board of Directors of the SCRTD and a brochure describing benefit assessment in more detail are available on request.

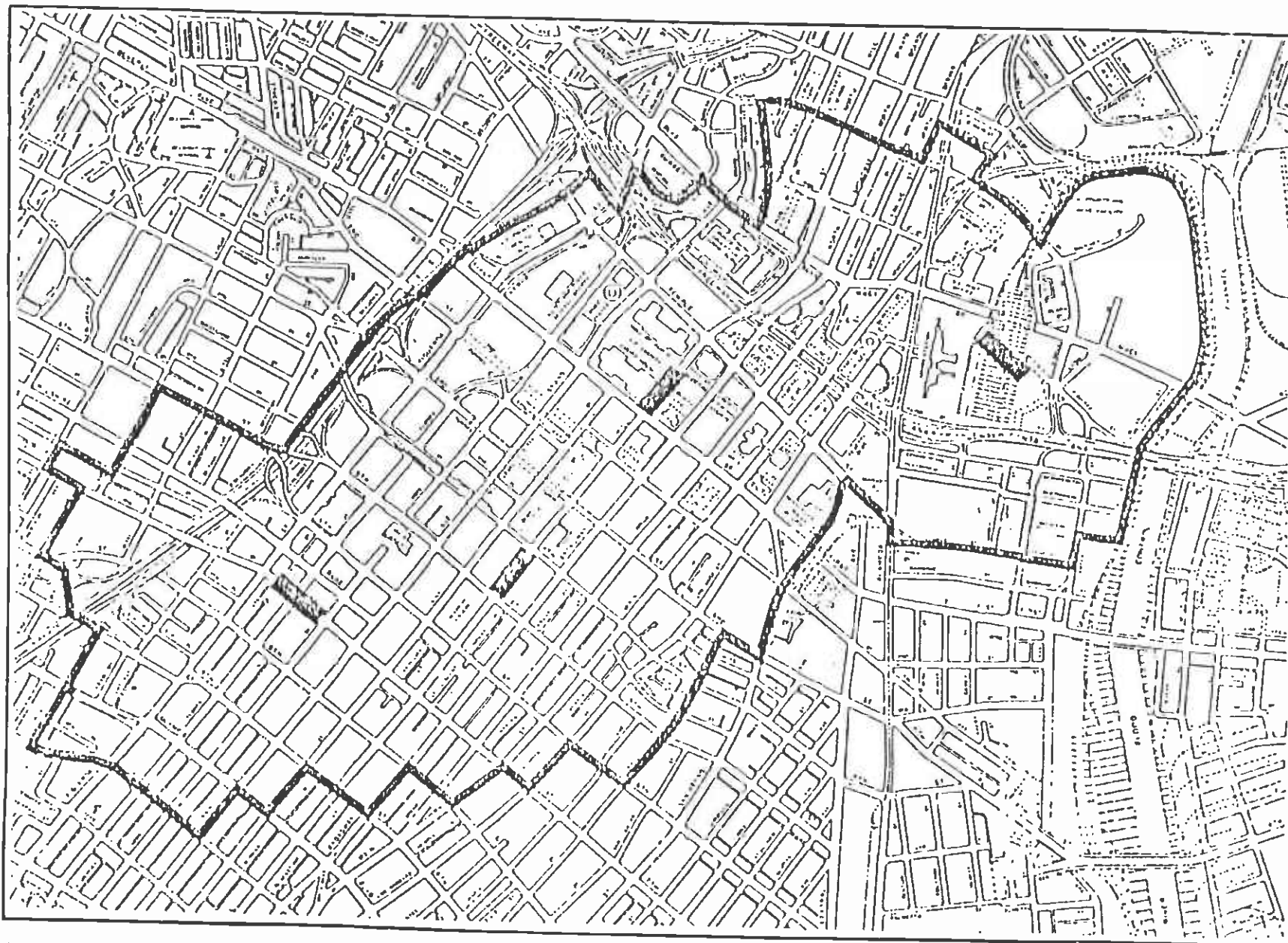
For further information, call "Metro Rail is Coming" at (213) 972-6456, or write the Community Relations Department at SCRTD (address below).

Sincerely,

A handwritten signature in dark ink, appearing to read "Nikolas Patsaouras", written over a horizontal line.

Nikolas Patsaouras  
President, RTD Board

BENEFIT DISTRICT NO. A1 OF THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
(CBD DISTRICT)



82



METRO RAIL STATION



SAMPLE D  
CBD DISTRICT HEARING

NOTICE OF PUBLIC HEARING REGARDING  
RESOLUTION OF INTENT OF THE BOARD OF DIRECTORS OF  
THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
TO FORM BENEFIT ASSESSMENT DISTRICT

Dear Property Owner:

This notice is to inform you, the property owner, that the Southern California Rapid Transit District (SCRTD) intends to establish a Benefit Assessment District (for the Wilshire/Alvarado area) and to levy a special benefit assessment on real property therein for the purpose of financing, in part, the construction of a rail transit station and rail transit related facilities within the Benefit Assessment District. Your property is located within the boundaries of the proposed Benefit Assessment District.

A public hearing regarding the Resolution of Intent of the Board of Directors of SCRTD to form the Benefit Assessment District will be held at:

Location: SCRTD's Headquarters Building, Board Room  
2nd Floor  
425 South Main Street  
Los Angeles, California 90013

on: Thursday, January 24, 1985

time: 9:30 A.M.

The rail transit station within the proposed Benefit Assessment District is a part of the first segment of the San Fernando Valley to Downtown Los Angeles Metro Rail Project.

The boundaries of the proposed Benefit Assessment District are shown on the attached map. The Resolution of Intent of the Board of Directors of the SCRTD and a brochure describing benefit assessment in more detail are available on request.

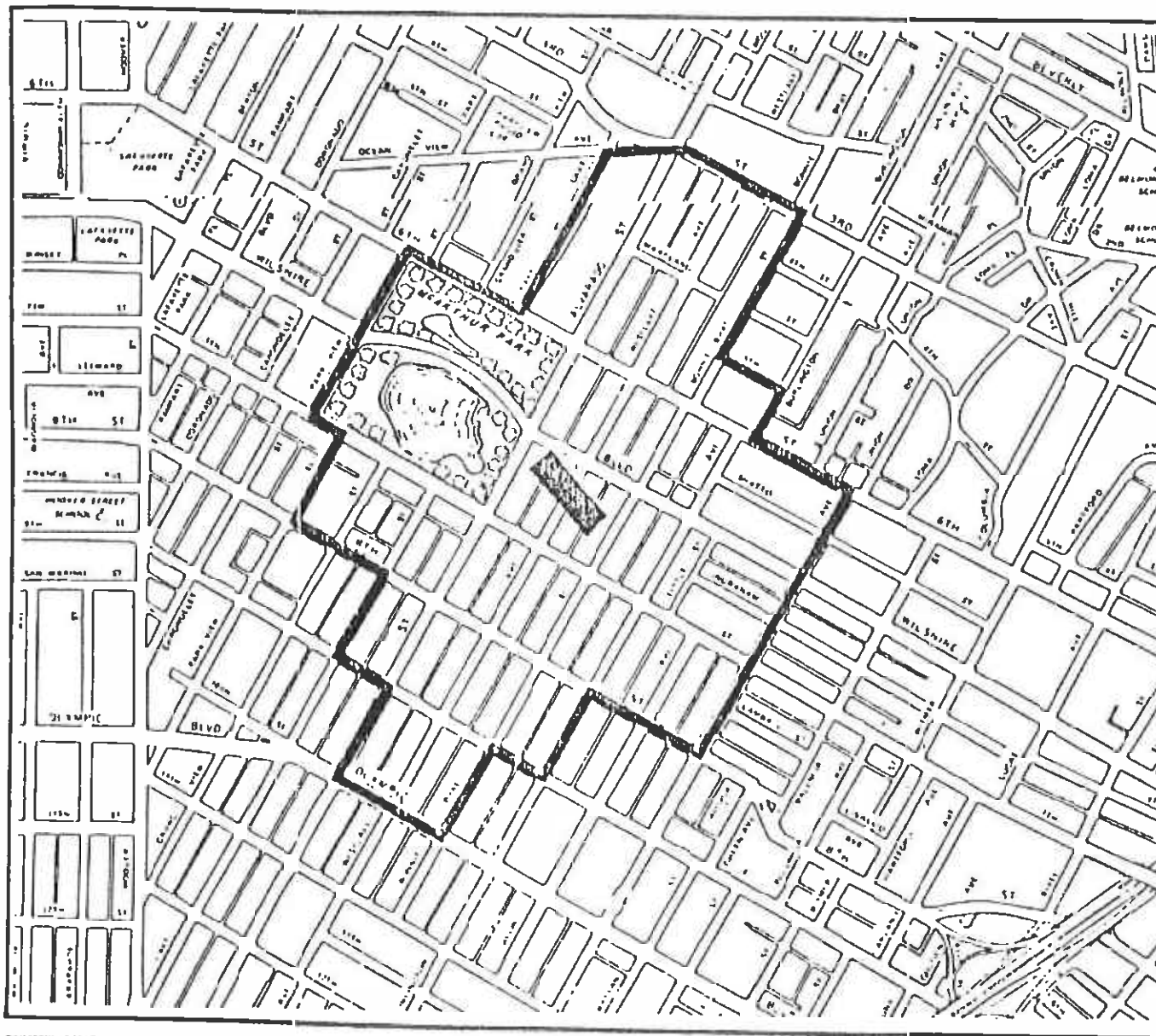
For further information, call "Metro Rail is Coming" at (213) 972-6456, or write the Community Relations Department at SCRTD (address below).

Sincerely,

A handwritten signature in dark ink, appearing to read "Nikolas Patsouras", written over a light-colored background.

Nikolas Patsouras  
President, RTD Board

BENEFIT DISTRICT NO. A2 OF THE SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT  
(ALVARADO DISTRICT)



 METRO RAIL STATION



SAMPLE E

GENERAL MAILING

SEP 4 - 1987

Dear Property Owner:

According to the records of the Los Angeles County Tax Assessor, you own property located in Metro Rail Special Benefit Assessment District A1 and/or A2. The purpose of benefit assessment districts is to raise 10% of the construction funds for the Minimum Operable Segment-1 (MOS-1), including the first five stations in the Metro Rail System.

The Board of Directors of the Southern California Rapid Transit District (SCRTD), which is authorized by State Law to administer the benefit assessment program, created the two districts in 1985 and levied the first assessment program, created the two districts in 1985 and levied the first assessments in fiscal year 1986/87. The assessments are collected for the SCRTD by the Los Angeles County Tax Collector and appeared on your 1986/87 "Joint Consolidated Tax Bill" under "Direct Assessments." If your property is located in District A1, the assessment was labelled "SCRTD-CBD." If your property is located in District A2, the assessment was labelled "SCRTD-Wilshire." The deadlines for filing Payment of Assessment were the same as your real property and other taxes/assessments: December 10, 1986 and April 10, 1987.

The assessment rate for the 1986/87 assessment year was set by the SCRTD Board of Directors at thirty cents per square foot. The SCRTD met with concerned property owners during the early part of 1987 to consider a proposal to defer the collection of benefit assessment payments for five years when Metro Rail operation is scheduled to begin. On February 26, 1987, the SCRTD Board of Directors voted to endorse, in principle, a deferral of Metro Rail MOS-1 benefit assessment payment until 1992. The 1986/87 assessments are still valid.

On August 13, 1987, the SCRTD Board approved a benefit assessment rate of zero cents per square foot for the 1987/88 assessment year in Special Benefit Assessment Districts A1 and A2. The Metro Rail benefit assessment will not appear on your 1987/88 Joint Consolidated Tax Bill prepared by the Los Angeles County Tax Collector. The assessment rate is expected to be set by the Board above zero cents per square foot in the 1992/1993 assessment year and thereafter until 2008.

If you have any questions, please call the Benefit Assessment Office at (213) 237-2125 or (213) 237-2129.

Sincerely,

A handwritten signature in black ink, appearing to read "John A. Dyer", is written over a horizontal line. The signature is fluid and cursive.

John A. Dyer

15.0 SAMPLE INDEX OF MAILING FILE MEMORANDUM

Mailing for May 14, 1987 Public Hearing (see BOND HEARING, sample A, page 87)

Mailing for August 26, 1987, Public Hearing, Manely Hearing (see APPEALS HEARING, sample B, page 89)

Mailing for January 21, 1985, Public Hearing (see ESTABLISHING CBD DISTRICT, sample C, page 90)

Mailing for January 24, 1985, Public Hearing (see ESTABLISHING CBD DISTRICT, sample D, page 91)

SAMPLE A

BOND HEARING

MEMORANDUM

INFORMATION TO: File  
FROM: GFC  
DATE: November, 1987  
SUBJECT: Mailing for May 14, 1987 Public Hearing

MAILING DATES: April 1, 1986

SUBJECT: Benefit Assessment District Bonds

NOIFICATION TYFE: Public Hearing/Bond Issue

PUBLIC HEARING: To hear comments concerning the proposed issuance of Benefit Assessment District Bonds

TOTAL PIECES MAILED:	3095
CENTRAL BUSINESS DISTRICT, DISTRICT A1 PRIVATE OWNERSHIP:	2288
WILSHIRE ALVARADO DISTRICT, DISTRICT A2 PRIVATE OWNERSHIP:	487
POSSESSORY INTEREST:	153
GOVERNMENTAL AGENCIES:	167

	<u>#</u>	<u>%</u>
PIECES RETURNED:	288	9.3
REASONS: Change of address in one condominium accounted for 86 pieces.		
PIECES FORWARDED:	174	60.4
TOTAL PIECES UNRETURNED:	114	39.6



PAGE TWO  
MEMORANDUM  
SUBJECT: May, 1987 Public Hearing

OF ALL PIECES FORWARDED, NUMBER REDIRECTED BASED ON THE FOLLOWING  
FORWARDING INFORMATION: 174 pieces

	<u>#</u>	<u>%</u>
RETURNED LETTER:	29	16.7
CORRECTED ADDRESS FORM APPEALS DATA BASE:	17	10.9
PHONE LISTINGS:	111	63.8
FIELD SURVEY:	15	8.6

**SAMPLE B**

**APPEALS HEARING**

**M E M O R A D U M**

INFORMATION TO: File  
FROM: Maggi Giacosia  
DATE: November, 1987  
SUBJECT: Mailing for August 26, 1987 Manley Hearing

MAILING DATES: June 16, 1987

SUBJECT: Benefit Assessment Appeals Case No. A1-47-86

NOTIFICATION TYPE: Requested by Mr. Bruce Manley, property owner  
of Manley Oil Co, Inc.

PUBLIC HEARING: Hearing of Appeals Case No. A1-47-86 for  
contention of no benefit

TOTAL PIECES MAILED: 2718

CENTRAL BUSINESS DISTRICT, DISTRICT 41  
PRIVATE OWNERSHIP: 2718

OTHERS WHO REQUESTED NOTIFICATION:

	<u>#</u>	<u>%</u>
PIECES RETURNED:	124	4.6
REASONS:		
Groups*	44 Pieces	1.60%
Incomplete addresses	10 pieces	0.30%
Returned for Postage	1 piece	0.03%
No address on envelope	1 piece	0.03%
New address included	6 pieces	0.20%
New address not included	62 pieces	2.20%
(* 44 pieces in 11 groups addressed to the same owner)		
PIECES FORWARDED:	65	2.4
TOTAL PIECES UNRETURNED: (not forwarded)	59	47.6

SAMPLE, C

CBD DISTRICT HEARING

MEMORANDUM

INFORMATION TO: File  
FROM: Maggi Giacosis  
DATE: November, 1987  
SUBJECT: Mailing for January 21, 1985 Public Hearing

MAILING DATE: December 14, 1984

SUBJECT: Establishment of the CBD

NOTIFICATION TYPE: Public Hearing announcement sent with map of district

PUBLIC HEARING: of January, 1985

TOTAL PIECES MAILED: 2860

CENTRAL BUSINESS DISTRICT, DISTRICT A1  
PRIVATE OWNERSHIP:

WILSHIRE ALVARADO DISTRICT, DISTRICT A2  
PRIVATE OWNERSHIP:

POSSESSORY INTEREST:

GOVERNMENTAL AGENCIES:

	<u>#</u>	<u>%</u>
PIECES RETURNED:	107	3.7

REASONS:

PIECES FORWARDED: no corrections were made on this mailing because of the mailing of December 21, 1984 that was to follow.

TOTAL PIECES UNRETURNED: (not forwarded)	107	0.0
---	-----	-----

SAMPLE D  
CBD HEARING

M E M O R A D U M

INFORMATION TO: File  
FROM: Maggi Giacosie  
DATE: November, 1987  
SUBJECT: Mailing for January 24, 1984 Hearing

MAILING DATE: December 21, 1984  
(different letters sent to those who received the letters on the 14th of December)

SUBJECT: Establishing the Central Business District and financing the construction of it.

NOTIFICATION TYPE: Public Hearing memo with map

PUBLIC HEARING: for for financing the CBD

TOTAL PIECES MAILED: 2726

CENTRAL BUSINESS DISTRICT, DISTRICT A1  
PRIVATE OWNERSHIP:

WILSHIRE ALVARADO DISTRICT, DISTRICT A2  
PRIVATE OWNERSHIP:

POSSESSORY INTEREST:

GOVERNMENTAL AGENCIES:

	<u>#</u>	<u>%</u>
PIECES RETURNED:	132	4.8
REASONS:		
PIECES FORWARDED:	63	47.7
TOTAL PIECES UNRETURNED: (not forwarded)	69	52.3