

## **Assessment District Questionnaire**

(To be completed by a State Agency when participating in an Assessment District)

Per the State Administrative Manual (SAM) Section 1310.05 and Management Memo 05-17, upon receipt of an invoice, statement, tax bill or other notification with a line item assessment or information pertaining to the development on an Assessment District (District), all state agencies are required to review the information and obtain its legal counsel's opinion in determining if the Assessment District was constituted pursuant to the procedures prescribed by law. Further, the agency must evaluate whether or not the state property within the district receives a special benefit.

SAM requires the Department of General Services (DGS), Real Estate Services Division RESD, Asset Management Branch (AMB) to maintain records of assessments paid by state agencies.

Upon determination that your agency will participate in an Assessment District, please provide the AMB the following information pertaining to the Assessment District.

1. The official name of the assessment and its effective date of creation.
2. The county implementing the Assessment District (District).
3. State agency/ies participating in the District with each state agency's contact information.
4. Contact information for District administration.
5. Proposed assessment amount.
6. Amount chargeable to the entire Special Assessment District.
7. Amount chargeable to the state's particular parcel/s.
8. Duration of the payments.
9. A description of state-owned parcels affected by District – including uses, acreage, Assessor's parcel Number, address, or other means of identifying the parcel, etc. where available.
10. Map of the District boundaries with state-owned parcels highlighted.

Your assistance in maintaining records mandated by SAM is appreciated. Please send information to:

Department of General Services  
Asset Management Branch  
707 3<sup>rd</sup> Street – 5<sup>th</sup> Floor  
West Sacramento, CA 95605

If you have questions regarding this process, call (916) 376-1800 for assistance.