

Information Requirements Checklist

Tax Incremental District (TID) Project Plan Amendment

This checklist identifies information that Ehlers will need to prepare a project plan amendment for TID. If you have questions as to the information we've requested, please let us know. As we prepare the plan amendment, we may have other questions or may identify additional information requirements.

Joint Review Board (JRB)

Ehlers will contact the taxing jurisdictions that will form the JRB to confirm a date and time for the required organizational meeting. To assist us in this process:

- _____ Please provide us with two or three alternate date and time options for the meeting. (The timeframe during which the meeting must be scheduled is identified in the timeline accompanying this checklist). We will query the overlapping taxing jurisdictions to ensure that a quorum can be achieved.
- _____ Please confirm where the JRB meeting will be held, to include a specific room number if applicable.
- _____ If your community is in more than one school district, please confirm which school district(s) the TID is located in.
- _____ If any portion of the TID is in a lake management district, metropolitan sewerage district or sanitary district, please identify that district.
- _____ Please confirm the name of your municipal representative to the JRB.
- _____ Please provide us with the name and contact information for your JRB's public member. If your JRB is not standing, you will need to identify an individual that your jurisdiction plans to nominate to fill that role. The nomination and approval of the public member occurs at the JRB's organizational meeting.

Public Hearing

Ehlers will prepare and coordinate publication of the public hearing notice. Please confirm:

_____ The time that you will hold the public hearing.

_____ The location where the hearing will be held, to include a specific room number if applicable.

Required Mapping

Please provide us with the maps detailed below which are needed for the project plan. Maps can be provided in 8-1/2" x 11" or 11' x 17" format. If the information requirements for each map can be more easily provided on a series of maps, more than one map can be provided to meet each requirement.

_____ Map of District 1/2 Mile Boundary

- If the amendment will add authority to undertake projects outside of, but within ½ mile of the TID's boundaries, provide a boundary map that shows the areas located within the ½ mile perimeter surrounding the TID. Qualifying areas for ½ mile expenditures must also be located within your governmental unit's boundaries.

_____ Updated Map Showing Proposed Improvements and Uses.

- Intent of map is to show the development that is expected to occur within the TID, and the project costs that will be undertaken to promote that development. Please provide us with an updated version of the map from the original TID project plan that incorporates the additional projects being added to the plan as well as any additional development or redevelopment opportunities resulting from those projects.,
- Identify and label project costs that have a geographical location such as a specific street or utility improvement, or a development incentive to be paid for a development in a specific location.
- For project costs that are not geographically associated or may be undertaken anywhere within the TID, provide a note on the map to that effect. For example, "The City expects to pay development incentives to qualifying development projects within the TID and will incur administrative and other professional service expenses in the implementation of the Project Plan."
- Identify locations and types of expected development within the TID. For example, "Proposed 72-Unit Multi-Family Development" or "Proposed Mixed Use Renovation of

former ABC Supply Building.” If available, a developer’s site plans, or renderings can be useful to incorporate into the mapping or project plan to provide further detail as to planned development.

Project Cost Data

- _____ Provide an updated list and description of the project costs expected to be incurred in implementing the TID’s amended project plan. Provide the estimated dollar cost for each line item, the source of that estimate, and the timeframe during which the expenditure is expected to be made.
- _____ Note any costs that you expect to incur that may be made outside of, but within a ½ mile of the TID’s boundaries. Expenditures for improvement of water system, sewer system or stormwater management infrastructure necessary to support the TID are not limited to the ½ mile restriction.
- _____ Provide a list of any costs that you expect to incur to implement the TID’s amended project plan but will be paid from other sources (referred to as “non-project costs”). Examples might be public infrastructure to be specially assessed, or portion of a utility improvement being made to benefit areas outside of the TID.

Development Valuation

- _____ Please provide any information you have available that details the type of development or redevelopment activity expected within the TID, timing of construction or absorption, and estimated valuations. Please consult with your assessor for assistance in determining estimated valuations.

Other Information Needed

- _____ Please provide a copy of your DOR Form PC-202 (Tax Increment Collection Worksheet) for your most recent levy year.
- _____ Please provide copies or excerpts of any planning documents or staff reports that detail the need for the TID amendment or identify the goals and objectives for the TID amendment. This is useful information that we can integrate into the updated project plan narrative.
- _____ Please provide any information you may have related to the anticipated economic benefits of proposed TID development. For example, information related to the number of jobs expected to be created, or projected secondary impacts such as spending in the community,

increased sales and payroll taxes, or other economic benefits to your community, the region or state.

_____ The TID law requires that we provide an estimate as to the percentage of the property within the TID that will be devoted to retail business at the end of the TID's expenditure period. Please provide us your updated estimate of that percentage. There is no consequence, or any limitations created because of the percentage reported so a best estimate is sufficient.

_____ We will need a legal opinion from your municipal attorney indicating that the amended project plan is complete. The opinion will be needed prior to governing body approval of the TID, and the draft plan will include a sample format. We will provide a reminder of this requirement at the appropriate time._