

Introduced by: Mayor
Date: 01/04/22
Action: Adopted
Vote: 9 Yes, 0 No, 0 Absent

**KENAI PENINSULA BOROUGH
RESOLUTION 2022-001**

**A RESOLUTION TO FORM THE SOUTH BEND BLUFF ESTATES ROAD
IMPROVEMENT ASSESSMENT DISTRICT AND PROCEED WITH THE
IMPROVEMENT**

- WHEREAS,** KPB Chapter 14.31 authorizes the formation of road improvement districts within the Kenai Peninsula Road Service Area (RSA); and
- WHEREAS,** an application for a petition to form a road improvement assessment district (RIAD) was received from the property owners within the proposed district; and
- WHEREAS,** KPB 14.31.040 requires that applications to form a RIAD and to participate in the RIAD match program shall be received no later than July 1 of each year; and;
- WHEREAS,** the application for South Bend Bluff Estates RIAD formation and to participate in the match program was submitted timely; and
- WHEREAS,** on November 24, 2020, the RSA board reviewed the RIAD application and authorized funding to obtain an engineer's estimate for the South Bend Bluff Estates RIAD for the purpose of an improvement and paving upgrade on that portion of Winridge Avenue (1,030 LF), Winridge Court (550), Wispen Avenue (850), Grant Avenue (1,710) and Southbend Court (665), for approximately 4,805 total lineal feet of roadway; and
- WHEREAS,** pursuant to KPB 14.31.065, on September 14, 2021, the RSA board adopted RSA Resolution 2021-006 approving the circulation of the South Bend Bluff Estates RIAD petition consistent with the recommendations in the staff report of November 24, 2020; and
- WHEREAS,** KPB 14.31.070(D) requires signatures of the owners of record of (a) at least 60 percent of the total number of parcels subject to assessment within the proposed district and (b) at least 60 percent in value of the property to be benefited, in order to be considered by the assembly for formation, and 78.43 percent of recorded owners have signed the petition, and 84.15 percent in value of the property to be benefited; and
- WHEREAS,** the petition and required filing fee were submitted timely by the sponsor, and the borough clerk has certified that the petition contains sufficient signatures to meet the thresholds required by KPB 14.31.070; and

WHEREAS, the borough clerk gave notice of the public hearing for this resolution by certified mail, return receipt requested, mailed not less than 35 days before the date of the hearing, to each record owner of a parcel in the proposed district; and

WHEREAS, the clerk further gave notice by publication once a week for two consecutive weeks in a newspaper of general circulation in the borough, with the first publication appearing not less than 30 days before the date of the hearing; and

WHEREAS, more than 35 days have passed since the mailing of the notice of the public hearing to each record owner of a parcel in the proposed district, and no written objections to the necessity of formation of the district has been filed with the borough clerk; and

WHEREAS, KPB 14.31.090 requires the mayor to prepare for assembly consideration a resolution to form the special assessment district and proceed with the improvement, and to submit with the resolution the petition report described in KPB 14.31.060, the RSA resolution to approve the petition report and recommend a borough match, a description of the current condition of the rights-of-way that are to be improved and a statement of the need for the proposed local improvement, and the method of financing the improvement;

NOW, THEREFORE, BE IT RESOLVED BY THE ASSEMBLY OF THE KENAI PENINSULA BOROUGH:

SECTION 1. That the Kenai Peninsula Borough shall form the South Bend Bluff Estates Road Improvement Assessment District (RIAD), and the mayor is authorized to proceed with the construction of the improvement in accordance with the provisions of KPB Chapter 14.31 and RSA Resolution 2021-06, attached as Exhibit 1 to the Mayor's Report.

SECTION 2. That pursuant to the requirements of KPB 14.31.090, this resolution is supported by the Mayor's Report, which is attached hereto and incorporated herein by reference.

SECTION 3. That the proposed South Bend Bluff Estates RIAD is necessary and should be made and is hereby formed, and the borough shall proceed with the construction of the proposed paved improvement for a district encompassing 51 benefited parcels in the area of Kalifornsky, for approximately 4,805 linear feet of roadways of that portion of Winridge Avenue, Winridge Court, Wispen Avenue, Grant Avenue, and Southbend Court.

SECTION 4. That the boundaries of the RIAD for improving the roadway set forth in the district map attached as Exhibit 4, page 11, to the Mayor's Report and the properties legally described in the Estimate Assessment Roll as Mayor's Report Exhibit 4, pages 7-10, are hereby approved as comprising the RIAD.

SECTION 5. That the estimated cost of the project of \$770,164.26, which includes direct costs of \$691,450.33, a 10 percent KPB project contingency of \$69,145.03 per KPB 14.31.060(2)(a), and indirect administrative costs of \$9,568.90, is approved.

SECTION 6. That the attached Estimate Assessment Roll, Mayor’s Report Exhibit 4, pages 7-10, which includes properties within the district to be properly included and subject to an assessment of \$7,550.63 per parcel for the improvement, is incorporated by reference herein and adopted.

SECTION 7. That the mayor is authorized to negotiate and execute such documents as are determined to be in the best interests of the borough to proceed with the construction of the improvement and to accomplish all other aspects of this project.

SECTION 8. That the borough clerk shall cause a copy of this resolution and estimated assessment roll to be recorded in the District Recorder's Office for the State of Alaska at Kenai.

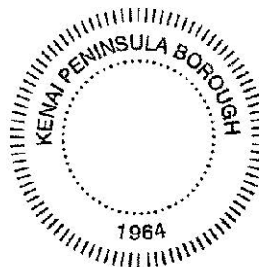
SECTION 9. That this resolution is effective immediately upon its adoption.

ADOPTED BY THE ASSEMBLY OF THE KENAI PENINSULA BOROUGH THIS 4TH DAY OF JANUARY, 2022.


Brent Johnson, Assembly President

ATTEST:


John Blankenship, MMC, Borough Clerk



Yes: Bjorkman, Chesley, Cox, Derkevorkian, Ecklund, Elam, Hibbert, Tupper, Johnson
No: None
Absent: None

Kenai Peninsula Borough

Assessing Department

MEMORANDUM

TO: Brent Johnson, Assembly President
Members, Kenai Peninsula Borough Assembly

THRU: Charlie Pierce, Mayor *CP*
Adeena Wilcox, Director of Assessing *aw*

FROM: Marie Payfer, Special Assessment Coordinator *MP*

DATE: December 22, 2021

RE: Mayor's Report Resolution 2022-001, To Form the South Bend Bluff Estates Road Improvement Assessment District and Proceed with the Improvement (Mayor)

MAYOR'S REPORT

Property owners in the proposed South Bend Bluff Estates Road Improvement Assessment District ("RIAD") have worked with the borough administration to form the proposed RIAD. Pursuant to the requirements of KPB 14.31.065, on September 14, 2021, the Road Service Area ("RSA") Board adopted RSA Resolution 2021-006, approving the petition report before its circulation among benefited property owners, approving up to \$385,082.13 as the RSA match for this project, and recommending the formation of the district (see Exhibit 1).

This resolution to form the RIAD and proceed with the improvement approves the formation of the RIAD and authorizes the mayor to proceed with the construction of the improvement. This is the first step in a three-step process requiring assembly action for the RIAD: 1) resolution to form the district and proceed with the improvement; 2) ordinance of appropriation of funds; and, 3) ordinance of assessment.

KPB 14.31.070(D) requires the petition to contain the signatures of the owners of record of (a) at least 60 percent of the total number of parcels subject to assessment within the proposed district; and, (b) at least 60 percent in value of the property to be benefited, in order to be considered by the assembly for formation. A completed petition for the formation of the RIAD was received by the assessing department on November 1, 2021. On November 1, 2021, the borough clerk certified the petition with 40 of 51 property owners, 78.43 percent, supporting the proposed district and 84.15 percent of the value of the district (see Exhibit 2, Certification of Petition, and Exhibit 4, Estimate Assessment Roll). Additionally, the borough clerk sent all required notices to the property owners and published the required information concerning the proposed district as required by borough code.

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Date: December 22, 2021

RE: R2022-001

The resolution is supported by the exhibits listed herein which provide the documentation required by code to support forming this RIAD and proceeding with construction.

Pursuant to KPB 14.31.090, the mayor shall prepare for assembly consideration a resolution to form the special assessment district and proceed with the improvement. The mayor shall submit with the resolution the following information, all of which is detailed in the referenced Exhibits to this memo.

- 1) RSA Resolution 2021-006, September 14, 2021, see Exhibit 1.
- 2) Certification of Petition, South Bend Bluff Estates RIAD, dated November 1, 2021, see Exhibit 2.
- 3) RSA Staff Report, dated November 24, 2020, a description of the current condition of the rights-of-way proposed for improvement and a statement of the need for the proposed local improvement, see Exhibit 3.
- 4) The petition report prepared by borough staff under KPB 14.31.060, updated to account for any change in information, see Exhibit 4. The petition report includes the following exhibits:
 - a) The petition information sheet which provided a description of the proposed improvement, and a description of the limitations on withdrawing a petition signature under KPB 14.31.070(E) (see Exhibit 4, pages 3-5).
 - b) The estimate assessment roll spreadsheet which provides the legal description of the benefited parcels, the name of the record owner, the total estimated cost of the project, an estimate of the amount to be assessed to each parcel, the status of tax payments, if there are other special assessment liens against any of the parcels in the proposed district, and a description of any benefited parcels that exceed the assessment-to-value ratio set forth in KPB 14.31.080(A)(1). There are no properties within this proposed district delinquent in payment of real property taxes, and no properties with other borough special assessment liens (see Exhibit 4, pages 7-10).
 - c) A map of the proposed RIAD district and boundaries (see Exhibit 4, page 11).
 - d) A memorandum from the Finance Director stating the method of financing, interest rate to be paid, and setting forth the number and frequency of payments (see Exhibit 4, pages 13 & 14).
 - e) Summary of construction cost estimates for the South Bend Bluff Estates RIAD (approx. 4,805 LF) provided by McLane Consulting, August 20, 2021 (see Exhibit 4, pages 15 & 16).

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Date: December 22, 2021

RE: R2022-001

Project Background:

The total project is estimated to cost \$770,164.26. This includes direct costs of \$691,450.33, a 10 percent KPB project contingency of \$69,145.03 per KPB 14.31.060(2)(a), and indirect administrative costs of \$9,568.90. There are 51 benefited parcels within this district.

KPB 14.31.120 requires the method of assessment shall be an allocation of costs on a per parcel basis so that each benefited parcel is charged an equal amount. The per-parcel cost is estimated to be \$7,550.63. Equal allocation is reasonable because the benefit of access to the improvement is the same for all parcels.

Pursuant to KPB 14.31.080(A)(1), a special assessment district may not be formed if the estimated amount of the assessment to be levied against each parcel in the district exceeds 25 percent for paved improvements. Within this proposed district, there are zero parcels that exceed the 25 percent limitation.

This matter is now presented to the assembly for approval to proceed with the project.

**KENAI PENINSULA BOROUGH ROAD SERVICE AREA
RESOLUTION 2021-006**

**A RESOLUTION APPROVING THE PETITION REPORT
AND RECOMMENDING A BOROUGH MATCH FOR THE
SOUTH BEND BLUFF ESTATES
ROAD IMPROVEMENT ASSESSMENT DISTRICT**

- WHEREAS,** the road service area (RSA) board authorized funding to obtain an engineer's estimate under KPB 14.31.050(E) for the South Bend Bluff Estates Road Improvement Assessment District (RIAD) at its November 24, 2020, meeting; and
- WHEREAS,** the engineer's estimate is \$691,450.33 for the South Bend Bluff Estates RIAD (includes construction costs of \$598,615, and other costs such as a 10 percent design & engineering cost of \$59,861.50, and a 5 percent contract administrative and construction management cost of \$32,973.83); and
- WHEREAS,** in accordance with KPB 14.31.060(2)(a) a 10 percent project contingency cost of \$69,145.03, and a KPB administration fee of \$9,568.90 have been added to the engineers estimate bringing the total estimated project cost to \$770,164.26; and
- WHEREAS,** per KPB 14.31.050(I), the sponsor has provided the assessing department with written notice of intent to proceed with the project; and
- WHEREAS,** pursuant to KPB 14.31.060, the borough assessor or the assessor's designee, in consultation with RSA staff, has prepared and submitted a special assessment district Petition Report for the RSA board's consideration and approval prior to circulation; and
- WHEREAS,** pursuant to KPB 14.31.050(J), at least 10 days prior to the hearing date of this resolution, the KPB Assessing Department notified the proposed benefited parcel owners by general mail, describing the special assessment district and proposed improvement, providing a map of the proposed improvement, the date of the public hearing, and informing the recipients that the legal description of parcels within the proposed district as of the date the RSA board approves the resolution will be used to determine assessments, and any action to replat parcels within the proposed district must be completed and recorded before the date the RSA board approves the resolution; and
- WHEREAS,** KPB 5.20.170 established a borough match fund program for RIAD projects that upgrade existing roads. Pursuant to KPB 14.31.055(A), the RSA board may authorize up to 50 percent of the costs of a RIAD be defrayed from the borough match fund for any project that upgrades existing roads; and
- WHEREAS,** KPB 14.31.055(B) states a borough match may be considered on RIAD projects for: (1) pavement projects for existing roads which have been certified for borough maintenance, (2) pavement or gravel projects for existing roads, which do not meet borough standards in order that the road will be brought to borough standards, and

(3) pavement or gravel projects for existing substandard gravel roads, which have been certified for borough maintenance in order that the road will be brought to borough standards; and

WHEREAS, it is in the best interest of the road service area and borough residents to approve the petition report and recommend a borough match based on 14.31.055(D) criteria for the proposed RIAD and make a recommendation to the borough assembly regarding formation of the district;

NOW, THEREFORE, BE IT RESOLVED BY THE KENAI PENINSULA BOROUGH ROAD SERVICE AREA BOARD:

SECTION 1. The board approves the Petition Report for the proposed South Bend Bluff Estates RIAD.

SECTION 2. The board recommends the assembly form and proceed with the South Bend Bluff Estates RIAD as set forth in the attached Petition Report contingent upon the further requirements of KPB 14.31 being met. There are five (5) exhibits to the Petition Report which are also included. Those exhibits are:

- 1) Petition Information Sheet: provides a description of the proposed improvement, a description of the limitations on withdrawing a petition signature under KPB 14.31.070(E), and provides the name, address and daytime telephone number of the sponsor(s) of the petition;
- 2) Estimated assessment roll: a spreadsheet listing the tax parcel number, legal description, the assessed valuation, the assessment-to-value ratio and any required prepayment of assessment as set forth in KPB 14.31.080(A)(1), maximum assessment, the name of the record owner, and any delinquencies or other special assessments liens of each parcel in the proposed district; additionally, the total estimate cost of the project, an estimate of the amount to be assessed to each parcel, and the total number of parcels to be assessed;
- 3) Map of the proposed RIAD district and boundaries;
- 4) Memorandum from the Finance Director stating the method of financing, interest rate to be paid, and setting forth the number and frequency of payments; and
- 5) Summary of construction cost estimates for the South Bend Bluff Estates RIAD provided by McLane Consulting Inc., prepared August 20, 2021.

SECTION 3. The board approves expenditure of up to 50 percent (estimated to be \$385,082.13) from the RIAD Match Fund for the South Bend Bluff Estates RIAD. This RIAD includes the improvement and paving upgrade on that portion of Winridge Avenue (1,030 LF), Winridge Court (550), Wispen Avenue (850), Grant Avenue (1,710) and Southbend Court (665), for approximately 4,805 total lineal feet of roadway.

SECTION 4. The project scope of work provides road upgrades and paving to approximately 4,805 linear feet currently on the Road Service Area maintenance list.

SECTION 5. The board recommends that the borough proceed with the construction of the road improvement to a district encompassing 51 benefited parcels, as shown in Petition

Report Exhibit 3, the district map, contingent upon the further requirements of KPB Chapter 14.31 being met.

SECTION 6. The board makes the following findings required by KPB 14.31.055(D):

1. Standard: Whether it is economically feasible to improve the road to RSA certification standards.
Finding: The entire project cost is estimated to be \$770,164.26. The project would provide pavement and reduce maintenance costs. The roads are in good condition, with no out of the ordinary costs for construction anticipated. Considering these factors, along with the funds available for RIAD matches, the project is economically feasible.
2. Standard: To what extent do the assessed values of the benefited properties support the scope of work for the project.
Finding: Pursuant to KPB 14.31.080(A)(1), no lien may exceed 25 percent of the current assessed value of the parcel for pavement improvements. The attached spreadsheet, Petition Report Exhibit 2, shows that if the borough makes a 50 percent match, assessments for each parcel will be \$7,550.63. Parcels range in value from \$28,800 to \$809,500. Liens will exceed 25% of the current assessed value on five (5) parcels within the proposed district. Partial prepayments of assessments (liens) will be required on these parcels. However, the overall assessed values support the project.
3. Standard: The number of applications for projects received that year.
Finding: This is the only application for projects received prior to the July 1, 2021, deadline.
4. Standard: The funds available in the Road Improvement Assessment District Match Fund.
Finding: The balance of the RIAD Match Fund is \$963,910, which is sufficient to cover the match costs.
5. Standard: Whether an application for district formation has been previously filed and whether conditions have changed to make the project more feasible than in past application years.
Finding: No application for district formation has been submitted for these roadways.
6. Standard: The number of residents served.
Finding: The proposed RIAD serves an estimated 75 residents.
7. Standard: The number of parcels served.
Finding: There are 51 parcels served.
8. Standard: The feasibility of the project's compliance with KPB 14.31.080(A) criteria regarding restrictions on formation.
Finding: The project meets all the following feasibility criteria:

1. Does the assessment to assessed value ratio exceed 21 percent for gravel improvements to an existing road, or 25 percent for pavement improvements, or 40 percent for construction of a new road, of the current assessed value of the parcels?

Yes. There are five (5) properties within this RIAD whose assessment to assessed value ratio exceeds the 25 percent for pavement improvements restriction. Prepayments of assessments will be required, totaling \$803.15.

2. Are there parcels bearing more than 10 percent of the estimated costs of the improvement that are subject to unpaid, past-due borough property taxes?

No. Presently there are no parcels within this RIAD which are delinquent in payment of borough real property taxes.

3. Do unimproved parcels represent more than 40 percent of the assessed value within the district?

No. Of the 51 total properties within this residential neighborhood district, there are 10 parcels which are unimproved properties, a ratio of 3.95%.

4. For construction of new roads, does one owner own more than 40 percent of the parcels to be benefited?

N/A.

9. Standard: Whether there is alternate access to properties serviced by the roads and the condition of that alternate access.

Finding: There are no alternate accesses to South Bend Bluff Estates.

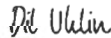
SECTION 7. That this resolution takes effect immediately and a copy of this resolution be forwarded to the mayor and assembly.

ADOPTED BY THE KENAI PENINSULA BOROUGH ROAD SERVICE AREA BOARD ON THIS 14TH DAY OF SEPTEMBER, 2021.



Robert Ruffner, Road Service Area Board Chair

ATTEST:



Dil Uhlir, Roads Service Area Director



Office of the Borough Clerk

144 North Binkley Street, Soldotna, Alaska 99669 • (907) 714-2160 • (907) 714-2388 Fax

Johni Blankenship, MMC
Borough Clerk

CERTIFICATION OF PETITION

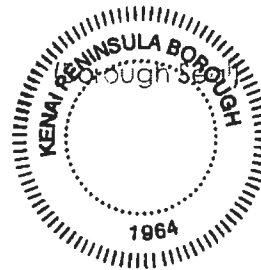
South Bend Bluff Estates
Road Improvement Assessment District

A petition for formation of the South Bend Bluff Estates Road Improvement Assessment District was received in the Office of the Borough Clerk on November 1, 2021. I hereby certify the petition as sufficient per the requirements set forth in KPB 14.31.070(D). Signatures of owners of record of at least 60% of the total number of parcels subject to the assessment were required as well as at least 60% in value of the property to be benefited. Signatures of property owners of 40 parcels (78.43%) were validated representing 84.15% of the assessed value of the property being benefited.

A Check in the amount of \$8,200.00 was received by the Special Assessment Coordinator on December 2, 2020 as required by KPB 14.31.050(G).

Dated this 1st day of November, 2021.

Johni Blankenship, MMC
Borough Clerk



cc: Justin Baldwin (Justin_L_Baldwin@yahoo.com) (RIAD Sponsor)
Marie Payfer, KPB Special Assessment Coordinator
KPB Assembly President Johnson and Members of the Assembly
KPB Mayor Charlie Pierce

Kenai Peninsula Borough

Assessing Department

MEMORANDUM

TO: Robert Ruffner, Road Service Area Board Chairman
Members, Kenai Peninsula Borough Road Service Area Board

FROM: Dil Uhlin, Road Service Area Director
Marie Payfer, Special Assessment Coordinator *MP*

DATE: November 24, 2020

RE: South Bend Bluff Estates RIAD Engineer's Estimate RSA Staff Report

In accordance with KPB 14.31.050(D), the following staff report is provided to the road service area (RSA) board for its consideration in evaluating the application for petition and determining whether the engineer's estimates for the following road improvement assessment district (RIAD) project should be funded through the Engineer's Estimate Fund established under KPB 5.20.160. Applications must be received by July 1 of each year (KPB 14.31.040), and petitions must be reviewed by September 1 of each year for construction in the following year (KPB 14.31.050(E)). The original application for the South Bend Bluff Estates RIAD was received on September 24, 2020, and a revised application was received on October 14, 2020, see Attachment #1. This project will be scheduled for year of construction in 2022.

The following is an analysis of the criteria the board must consider when it determines whether to appropriate money from the fund:

SECTION 1. APPLICATION:

SPONSOR: Justin Baldwin

SUBJECT ROADS: Located within the RSA West Region, Unit 7, the proposed district would include the west portion of Winridge Avenue at 1,100 linear feet (LF), Grant Avenue at 1,720 LF, Winridge Court at 550 LF, Southbend Court at 673 LF, and Wispen Avenue at 820 LF, for a total road length of approximately 4,863 LF. All roads are currently certified for road maintenance. The proposed project would benefit fifty-one (51) residential properties. See Attachment #2, District Map.

SCOPE: The application requests that the subject roads be improved and paved.

SECTION 2. KPB 14.31.080(A)(3) & (4) RESTRICTIONS ON FORMATION:

Pursuant to KPB 14.31.050(D), staff must prepare an initial report for the RSA board to consider for approval of an order for the engineer's estimate regarding the proposed project, based on the proposed boundaries (see attached map) and a review of 14.31.080(A)(3) and (4) restrictions on formation for the proposed project.

14.31.080(A)(3) *Do unimproved parcels represent more than 40 percent of the assessed value within the district?*

No. There are ten (10) unimproved parcels in this proposed district, representing 19.61% of the district properties. Forty-one (41) parcels within this district are improved residential properties, for a total of fifty-one (51) parcels.

14.31.080(A)(4) *If this project is for construction of new roads, does one owner own more than 40% of the parcels to be benefited?*

This project is not for construction for new roads.

SECTION 3. KPB 14.31.050(E) RSA BOARD CRITERIA:

Pursuant to KPB 14.31.050(E), the RSA board shall consider the following factors in evaluating petition applications and determining whether to approve an order for an engineer's estimate:

1. *Whether the roads are currently on the maintenance system.*
All roadways within this proposed project are on the KPB maintenance system. The proposed project is to improve and pave the road and bring the road up to Borough road standards.
2. *The number of petitions for projects received that year.*
This is the first petition (application) for projects received for the 2020 calendar year, however, the application was received after the July 1 deadline to meet construction for 2021. If approved, this project would be constructed in 2022.
3. *The funds available in the RIAD Engineer's Estimate Fund established under KPB 5.20.160.*
It is estimated that the RIAD application fee of \$8,200 will cover the engineers estimate. The current balance in the RSA's Engineer's Estimate Fund is \$12,000.
4. *Whether an application for district formation has been previously filed and whether conditions have changed that make the project more feasible than in past application years.*
This project has not been subject to a previous application for a special assessment district formation.

ADDITIONAL COMMENTS:

The sponsor has visited with the owners of several benefited parcels included in the proposed district and believes he will be able to obtain the required signature thresholds for support of the project.

Pursuant to KPB 14.31.040, the application must be received no later than July 1 of each year, and reviewed by the RSA Board prior to September 1, for consideration for construction for the following calendar year. As this application was received after July 1, 2020, the year of construction would be for calendar year 2022.

Parcel 055-423-21: The intersection at Grant Avenue and Southbend Court is included in the district boundaries for paving. Paving this intersection will include the driveway entrance to 47428 Grant Avenue. This parcel has been included in the district as a benefited parcel. See Attachment #3 & #4.

Parcel 055-423-22: It has been determined that this property will not benefit directly from the proposed improvement and is therefore not included in the district. The property located at 47488 Augusta National Road, is currently being served directly by Augusta National Road. The improvement will end prior to contact with this parcel's northwest corner boundary. See Attachment #4.

RECOMMENDATION:

South Bend Bluff Estates RIAD appears to be viable based on the substantial support for the project. Code requirements have been satisfied in regards to unimproved parcel ratio and ownership restriction percentages. The assessed value of the parcels appears sufficient to support the maximum assessment lien the equivalent of which is 25 percent of a parcel's value for paving projects, but that cannot be confirmed until a preliminary cost estimate is obtained. As of this date, zero parcels are delinquent in real property taxes. Therefore, it is recommended that the RSA board approve to order an engineer's estimate for this proposed project.

Your consideration is appreciated.

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PETITION REPORT
SOUTH BEND BLUFF ESTATES
ROAD IMPROVEMENT ASSESSMENT DISTRICT (RIAD)

In accordance to KPB Code Chapter 14.31, this petition proposes a road improvement assessment district (RIAD) be formed in the area of Kalifornsky, for the purpose of improving and paving a total road length of 4,805 linear feet (LF) of the subject roads of South Bend Bluff Estates. A map showing the parcels to be assessed is attached to the Petition Report as Exhibit 3. The project would benefit 51 parcels.

Project proposal: This RIAD includes the improvement and paving upgrade on that portion of Winridge Avenue (1,030 LF), Winridge Court (550), Wispen Avenue (850), Grant Avenue (1,710) and Southbend Court (665), for approximately 4,805 total lineal feet of roadway. The engineer's estimate for the total cost of construction is \$691,450.33, which includes the 2022 estimated construction cost of \$598,615, a 10 percent design and development cost of \$59,861.50, and a 5 percent contract administration and construction management cost of \$32,973.83. Added to the engineer's estimate is a 10 percent project contingency cost of \$69,145.03 (in accordance with KPB 14.31.060(2)(a)), and a KPB Administration Fee cost of \$9,568.90. **The total estimated project cost is \$770,164.26.** Accordingly, after accounting for a maximum RSA Match of 50% (*if approved, and contingent on the availability of funds*), the total estimated project cost for the **benefited parcels is \$385,082.13.** The proposed method of cost allocation is by equal assessment to each of the 51 benefited parcels. **The allocated cost per parcel is estimated at \$7,550.63.** See Exhibit 2 of the Petition Report, estimate assessment roll, for project cost calculation.

This Petition Report is supported by the attached exhibits:

- 1) Petition Information Sheet: provides a description of the proposed improvement, a description of the limitations on withdrawing a petition signature under KPB 14.31.070(E), and provides the name, address and daytime telephone number of the sponsor(s) of the petition;
- 2) Estimate assessment roll: a spreadsheet listing the tax parcel number, legal description, the assessed valuation, the assessment-to-value ratio and any required prepayment of assessment as set forth in KPB 14.31.080(A)(1), maximum assessment, the name of the record owner, and any delinquencies or other special assessment liens of each parcel in the proposed district, the total estimate cost of the project, an estimate of the amount to be assessed to each parcel, and the total number of parcels to be assessed; and
- 3) Map of the proposed RIAD district and boundaries;
- 4) Memorandum from the Finance Director stating the method of financing, interest rate to be paid, and setting forth the number and frequency of payments.
- 5) Summary of construction cost estimates for the South Bend Bluff Estates RIAD provided by McLane Consulting, Inc., prepared August 20, 2021.

RIAD sponsor(s):

BALDWIN, JUSTIN	47677 GRANT AVE, KENAI AK 99611	(907) 398-7624	Justin_L_Baldwin@yahoo.com
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**ROAD IMPROVEMENT ASSESSMENT DISTRICT (RIAD)
 PETITION INFORMATION SHEET
 SOUTH BEND BLUFF ESTATES RIAD**

In accordance to KPB Code Chapter 14.31, this petition proposes a road improvement assessment district (RIAD) be formed in the area of Kalifornsky, for the purpose of improving and paving a total road length of 4,805 linear feet (LF) of the subject roads of South Bend Bluff Estates. A map showing the parcels to be assessed is attached to the Petition Report (PR) as PR Exhibit 3. The project would benefit 51 parcels.

Project proposal: This RIAD includes the improvement and paving upgrade on that portion of Winridge Avenue (1,030 LF), Winridge Court (550), Wispen Avenue (850), Grant Avenue (1,710) and Southbend Court (665), for approximately 4,805 total lineal feet of roadway. The engineer’s estimate for the total cost of construction is \$691,450.33, which includes the 2022 estimated construction cost of \$598,615, a 10 percent design and development cost of \$59,861.50, and a 5 percent contract administration and construction management cost of \$32,973.83. Added to the engineer’s estimate is a 10 percent project contingency cost of \$69,145.03 (*in accordance with KPB 14.31.060(2)(a)*), and a KPB Administration Fee cost of \$9,568.90. **The total estimated project cost is \$770,164.26.** Accordingly, after accounting for a maximum RSA Match of 50% (*if approved, and contingent on the availability of funds*), the total estimated project cost for the **benefited parcels is \$385,082.13.** The proposed method of cost allocation is by equal assessment to each of the 51 benefited parcels. **The allocated cost per parcel is estimated at \$7,550.63.** See PR Exhibit 2, estimate assessment roll, for project cost calculation.

Additionally, with regard to each benefited parcel, PR Exhibit 2 (the estimate assessment roll) contains the tax parcel number, name of record owner, legal description, assessed value, estimated amount of special assessment, the existence of other special assessment liens (if any), and any violations of the assessment to value ratio per KPB 14.31.080(A).

The sponsor of this RIAD petition is:

BALDWIN, JUSTIN	47677 GRANT AVE, KENAI AK 99611	(907) 398-7624	Justin_L_Baldwin@yahoo.com
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What costs are covered: The estimated assessment will only cover the cost to improve and pave the public right-of-way of the above-mentioned roadways, not the private driveways to individual benefited parcels. For private existing driveways, the engineer’s report and design includes: (a) for gravel/dirt driveways, a 2’ apron from the road shoulder; and (b), for existing paved driveways, a paved uniform transition from the road shoulder to the standard transition match point, or edge of right-of-way.

Assessment lien and lien restrictions: The cost will be assessed in the form of a recorded lien on the benefited parcel. The lien will remain on the property until the assessment has been paid in full. In no case may a property be assessed (liened) an amount in excess of 25% of the current assessed value of the property for a paving improvement. For the purpose of this restriction, the estimated amount of the special assessment against a parcel will be reduced by the amount of a partial *prepayment* of the assessment, to reduce the assessment (lien amount) to less than or equal to 25% of the property’s assessed value.

Within this district, there are five (5) parcels which are affected by the assessment to value lien limit restriction. See PR Exhibit 2, Estimate Assessment Roll, for those parcels affected by this restriction, under column headed "Required Prepays".

Payment options: The cost assessed can be paid in full, or in 10 annual installments with interest to accrue on the unpaid amount of the assessment. The assessment may be paid at any time prior to the 10 year period without penalty. Interest will be added to any assessments not paid within 30 days of the date of mailing the Notice of Assessment (occurs after construction). The interest rate charged is the ***prime rate plus 2%** (**as of the date the ordinance confirming the assessment roll is enacted by the assembly*), and is fixed for the life of the loan. The penalty for delinquent installment and assessment payments is the same as the penalty for delinquent real property taxes in effect on the date of the delinquency. The lien will remain on the parcel until the debt has been paid in full.

Legal description of parcels: The legal description of the parcels subject to the special assessment within the proposed RIAD was established as of the date of the RSA resolution to approve the petition report and recommend a borough match. **The RSA Board approved RSA Resolution 2021-xx on September 14, 2021.** Any action to replat parcels within the proposed RIAD must have been completed and recorded before the date the RSA board approved the resolution. No further subdivision, reversion of acreage, or lot line adjustment will be recognized for RIAD assessment purposes after the RSA board issues the resolution.

Important information regarding subdividing benefited properties: pursuant to KPB 14.31.080(B), if a property owner seeks to subdivide a benefited parcel after the date of the RSA resolution or after costs are assessed, the property owner will be required to pay off the remaining balance of the assessment – or prepay estimated costs if the final assessment has not been determined – prior to approval of the final plat pursuant to KPB 20.60.030. Refunds of prepayments of assessments for plat approvals may apply: (a) if the RIAD petition or project should fail for any reason; (b) if the final plat is not approved pursuant to KPB 20.60.030 and the subdividing property request a refund within 30-days of the final assessment; or, (c) for any amount in excess of the prepaid estimated cost over the final assessment. The subdividing property owner will be responsible for payment if the estimate costs are less than the final assessment due within 30-days of the final assessment approval. See the KPB Finance Department for additional information.

Deferral of Payment of Principle (only): A deferment (e.g., postponement or delay) of payment of principle only, may be available to a qualifying owner of a benefited property. Some qualification are: • the property must be owned and occupied as the primary residence of the application; • the owner must be economically disadvantaged; and • interest will accrue and must be paid annually. Applications and annual renewals (to verify qualifying conditions continue to exist) must be submitted to the Finance Department by February 1. See the Finance Department for all restrictions and requirements for the deferment of principle option.

Petition signature thresholds: This petition proposes to assess all of the benefited parcels equally. In order to qualify, the petition must have the signatures of the owners of record of (a) at least 60% of the total number of parcels subject to assessment within the proposed RIAD, *and* (b) at least 60% in value of the property to be benefited. **Approval of the project is signified by properly signing and dating the Petition Signature Page.** Failure to secure enough signatures to meet these thresholds will cause the petition to fail.

Petition signature requirements: An owner's signature represents a **VOTE IN FAVOR** of the project. All signatures must be made in ink, dated properly, and the completed Petition Signature Page must be returned to the RIAD sponsor in a timely manner to meet the petition deadline. For parcels with joint ownership *each owner of record must sign and date the petition*. If a joint owner is deceased a copy of the death certificate must be provided. Refer to page 2 of the **Petition Signature Page** (included) for additional instructions.

Signature withdrawal, KPB 14.31.070(E): A signature on a petition may be withdrawn only by written notice from the signer submitted to the assessing department *prior* to the final filing of the completed petition signature pages by the sponsor. *A withdrawal is effective only if written notice of the withdrawal is submitted before the filing of the completed petition to the assessing department.* This restriction does not preclude the property owners from filing an objection as to the necessity of formation of the district as provided in KPB 14.31.090(D).

Deadline for signatures: The sponsor will be responsible to file the completed petition (signed & dated *Petition Signature Pages*) to the assessing department within *45 days of the date on which the assessing department distributes the final petition to the sponsor* for distribution to all property owners. Benefited property owners should **contact the RIAD sponsor(s)** with any questions regarding the **petition deadline**.

Certification of petition: Once the sponsor files the completed petition with the assessing department, the borough clerk shall determine whether the petition contains sufficient signatures as required. If the petition meets the required signature thresholds, the borough clerk shall certify the petition and submit the petition to the mayor for preparation of a resolution to form the district and proceed with the improvement.

ONLY the *Petition Signature Page* needs to be returned to the RIAD sponsor(s):

BALDWIN, JUSTIN	47677 GRANT AVE, KENAI AK 99611	(907) 398-7624	Justin_L_Baldwin@yahoo.com
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For additional information, contact:

Marie Payfer, KPB Special Assessment Coordinator

Direct: 907-714-2250 or Email: mpayfer@kpb.us

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SOUTH BEND BLUFF ESTATES RIAD - ESTIMATE ASSESSMENT ROLL

Resolution to Form the District and Proceed with the Improvement
Ordinance of Appropriation

RIAD FILING FEE: \$8,200
Received on December 2, 2020

PROJECT COSTS	ESTIMATE COST
Gravel Construction Cost:	598,615.00
Construction Contingency (5%):	32,973.83
Construction Cost Subtotal:	631,588.83
Engineering Design (10%):	59,861.50
Total Construction Cost:	691,450.33
RIAD Project Contingency (10%):	69,145.03
Filing Fee Adjustment:	0.00
KPB Administration Cost:	9,568.90
Total Project Cost:	770,164.26
Less Road Service Area Match (50%):	385,082.13
Final Cost to Parcel Owners:	385,082.13
Number of Benefitted Parcels:	51
Cost Per Parcel:	7,550.63

Total Assessed Value: 2021 Assessed Values
Lien limit per parcel: Cannot exceed 25% of Assessed Value, per 14.31.080(A)(1)

Total Estimated Project Cost: 385,082.13
Less any required pre-payment: (803.15) Paid 12/13/2021
Total Estimated Assessments: 384,278.98

Total number of parcels in district: 51
Total number parcels in Favor: 40
Percentage of parcels in Favor: 78.43% ≥ 60% 14.31.070(D)(a)
Percentage of parcels in Favor, 2021 AV: 84.15% ≥ 60% 14.31.070(D)(b)
Percentage of parcels w/Delinquent RP Taxes: 2% <10% per 14.31.080(2)
Unimproved parcels AV / District AV: 3.95% <40% per 14.31.080(3)

PARCEL ID	LEGAL	2021 ASSESSED VALUE	MAXIMUM ASSESSMENT	REQUIRED PREPAYS	PREPAYMENTS AMOUNTS	Ck#/Date	OWNER	ADDRESS	CITY ST ZIP	VOTED IN FAVOR	A.V. OF VOTES IN FAVOR	TAX DELINQ	OTHER SPC ASSMT
055-421-13	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 1 BLK 11	187,300	7,550.63	0.00			MICCICHE PETER ANDREW	PO BOX 1544	SOLDOTNA, AK 99669	YES	187,300	NO	NO
055-421-14	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 2 BLK 11	585,100	7,550.63	0.00			PITSILIONIS JOANNA	PO BDX 151	KENAI, AK 99611	YES	585,100	NO	NO
055-421-33	T 5N R 11W SEC 14 & 23 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 1 BLK 6	532,700	7,550.63	0.00			SMITH CARI & ANDREW	47457 WINRIDGE AVE	KENAI, AK 99611	YES	532,700	NO	NO
055-421-36	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 4 BLK 6	306,600	7,550.63	0.00			MENAPACE ROENA F	47410 AUGUSTA NATIONAL RD	KENAI, AK 99611	YES	306,600	NO	NO
055-421-37	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 5 BLK 6	466,300	7,550.63	0.00			NAYLOR MARRIE A & BOBBY B	47468 WISPEN AVE	KENAI, AK 99611	YES	466,300	NO	NO
055-421-38	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 6 BLK 6	281,500	7,550.63	0.00			SMITH PUSSADEE & DAVID P	47485 WINRIDGE AVE	KENAI, AK 99611	YES	281,500	NO	NO
055-421-39	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 6 BLK 5	319,600	7,550.63	0.00			COLEMAN LACEY D & KYLE A	PO BOX 2	SOLDOTNA, AK 99669	YES	319,600	NO	NO
055-421-44	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 0850122 WINRIDGE ESTATES SUB PART 1 LOT 1 BLK 5	28,800	7,200.00	350.63	350.63	266749 12/13/2021	MILLER TERA N & JARED J	PO BOX 404	SANTAQUIN, UT 84655		0	NO	NO
055-423-01	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 1 BLK 1	585,400	7,550.63	0.00			SMITH KEVIN R & TERESA M	47726 GRANT AVE	KENAI, AK 99611	YES	585,400	NO	NO
055-423-02	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 2 BLK 1	606,700	7,550.63	0.00			DUNAWAY ELONA & KYLE	57686 GRANT AVE	KENAI, AK 99611	YES	606,700	NO	NO
055-423-03	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 3 BLK 1	135,100	7,550.63	0.00			GABRIEL TERRYA & JOSEPH	36796 DOWN CIR	KENAI, AK 99611	YES	135,100	NO	NO
055-423-04	T 5N R 11W SEC 14 & 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 4 BLK 1	492,900	7,550.63	0.00			OMAN RONALD P & MARY TRUST	PO BOX 75	KENAI, AK 99611	YES	492,900	NO	NO
055-423-05	T 5N R 11W SEC 14 & 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 5 BLK 1	579,300	7,550.63	0.00			WILSON, GREGORY C	19110 WAR ADMIRAL RD	EAGLE RIVER, AK 99577	YES	579,300	NO	NO
055-423-06	T 5N R 11W SEC 14 & 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 6 BLK 1	138,500	7,550.63	0.00			CUNNINGHAM DENA R & SCOTT M	37100 EDGEWOOD DR	KENAI, AK 99611	YES	138,500	NO	NO
055-423-07	T 5N R 11W SEC 14 & 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 7 BLK 1	133,400	7,550.63	0.00			CUNNINGHAM DENA R & SCOTT M	37100 EDGEWOOD DR	KENAI, AK 99611	YES	133,400	NO	NO

EXHIBIT 4

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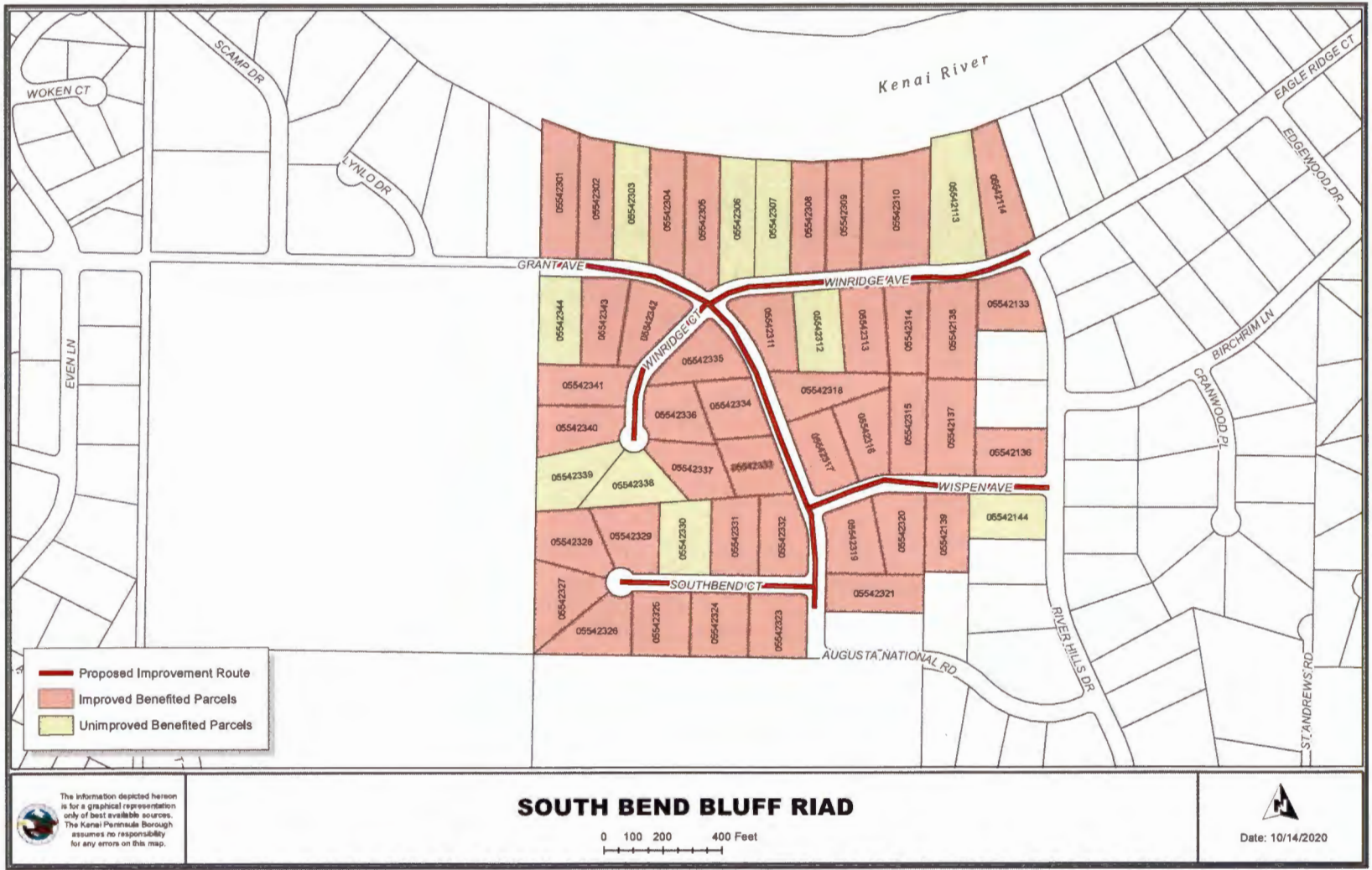
PARCEL ID	LEGAL	2021 ASSESSED VALUE	MAXIMUM ASSESSMENT	REQUIRED PREPAYS	PREPAYMENTS AMOUNTS	Cl#/Date	OWNER	ADDRESS	CITY ST ZIP	VOTED IN FAVOR	A.V. OF VOTES IN FAVOR	TAX DELINQ	OTHER SPC ASSMT
055-423-08	T 5N R 11W SEC 14 & 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 8 BLK 1	527,500	7,550.63	0.00			CARTER SUE C	PO BOX 212	KENAI, AK 99611	YES	527,500	NO	NO
055-423-09	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 9 BLK 1	551,500	7,550.63	0.00			MARTIN KAREN M & DAVID R	PO BOX 468	CLAM GULCH, AK 99568	YES	551,500	NO	NO
055-423-10	T 5N R 11W SEC 14 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 10 BLK 1	255,500	7,550.63	0.00			O'GUINN SHELLEY L & GEORGE C	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-11	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 1 BLK 2	524,100	7,550.63	0.00			MARTIN, JANELLE MCKEOWN, SEAN PERRY	44482 FRONTIER AVE	SOLDOTNA, AK 99669	YES	524,100	NO	NO
055-423-12	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 2 BLK 2	30,000	7,500.00	50.63	50.63	266749 12/13/2021	O'GUINN SHELLEY & GEORGE	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-13	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 3 BLK 2	809,500	7,550.63	0.00			O'GUINN SHELLEY & GEORGE	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-14	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 4 BLK 2	371,100	7,550.63	0.00			O'GUINN GEORGE	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-15	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 5 BLK 2	413,500	7,550.63	0.00			ZIBELL NIKKI J & DARREN D	47488 WISPEN AVE	KENAI, AK 99611	YES	413,500	NO	NO
055-423-16	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 6 BLK 2	715,800	7,550.63	0.00			O'GUINN LISA M & ERIC C	47498 WISPEN AVE	KENAI, AK 99611	YES	715,800	NO	NO
055-423-17	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 7 BLK 2	425,800	7,550.63	0.00			WOOD JENNIFER & WILLIAM	47468 GRANT AVE	KENAI, AK 99611	YES	425,800	NO	NO
055-423-18	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 8 BLK 2	518,700	7,550.63	0.00			GODSEY SARAH & MILES ALEKSANDR	PO BOX 2128	SOLDOTNA, AK 99669		0	NO	NO
055-423-19	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 1 BLK 3	444,600	7,550.63	0.00			RANEY TONYA S & STEPHEN E	47448 GRANT AVE	KENAI, AK 99611	YES	444,600	NO	NO
055-423-20	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 2 BLK 3	508,800	7,550.63	0.00			DODGE MARY K & DONALD J	4910 WOODRIDGE CIR	ANCHORAGE, AK 99516	YES	508,800	NO	NO
055-423-21	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 3 BLK 3	332,000	7,550.63	0.00			BRIGGS DUSTIN J SANDNESS SKYLA R	47428 GRANT AVE	KENAI, AK 99611	YES	332,000	NO	NO
055-423-23	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 22 BLK 4	342,200	7,550.63	0.00			O'GUINN SHELLEY L & GEORGE C	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-24	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 21 BLK 4	342,200	7,550.63	0.00			O'GUINN SHELLEY L & GEORGE C	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-25	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 20 BLK 4	338,800	7,550.63	0.00			O'GUINN SHELLEY & GEORGE	PO BOX 1501	SOLDOTNA, AK 99669		0	NO	NO
055-423-26	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 19 BLK 4	419,400	7,550.63	0.00			CRAWFORD LORRAINE F & WARREN D JR	47569 SOUTHBEND CT	KENAI, AK 99611	YES	419,400	NO	NO
055-423-27	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 18 BLK 4	439,800	7,550.63	0.00			ENGSTROM NICOLE & DANIEL	47589 SOUTHBEND CT	KENAI, AK 99611	YES	439,800	NO	NO
055-423-28	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 17 BLK 4	307,800	7,550.63	0.00			WALSH CAROL M & CLINTON R	47578 SOUTHBEND CT	KENAI, AK 99611	YES	307,800	NO	NO
055-423-29	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 16 BLK 4	560,700	7,550.63	0.00			VILLEGAS JANICE M & ANDEW	47558 SOUTHBEND CT	KENAI, AK 99611	YES	560,700	NO	NO
055-423-30	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 15 BLK 4	30,000	7,500.00	50.63	50.63	266749 12/13/2021	CHRISTOPHER GRANT T	PO BOX 3633	SOLDOTNA, AK 99669		0	NO	NO

PARCEL ID	LEGAL	2021 ASSESSED VALUE	MAXIMUM ASSESSMENT	REQUIRED PREPAYS	PREPAYMENTS AMOUNTS	Ck#/Date	OWNER	ADDRESS	CITY ST ZIP	VOTED IN FAVOR	A.V. OF VOTES IN FAVOR	TAX DELINQ	OTHER SPC ASSMT
055-423-31	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 14 BLK 4	334,300	7,550.63	0.00			GOFORTH DONALD L	47518 SOUTH BEND CT	KENAI, AK 99611	YES	334,300	NO	NO
055-423-32	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 13 BLK 4	467,100	7,550.63	0.00			HUNTER ROBERT L	47445 GRANT AVE	KENAI, AK 99611	YES	467,100	NO	NO
055-423-33	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 12 BLK 4	519,200	7,550.63	0.00			MCKINLEY CAITLIN E & MARK R	47465 GRANT AVE	KENAI, AK 99611	YES	519,200	NO	NO
055-423-34	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 11 BLK 4	387,000	7,550.63	0.00			ROLPH LISA M & ZACHARY M	47485 GRANT AVE	KENAI, AK 99611	YES	387,000	NO	NO
055-423-35	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 10 BLK 4	518,500	7,550.63	0.00			WEBER MICHAEL R & APRIL D	47589 WINRIDGE CT	KENAI, AK 99611	YES	518,500	NO	NO
055-423-36	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 9 BLK 4	429,600	7,550.63	0.00			TITUS CARRIE S & CHRISTOPHER J	47619 WINRIDGE CT	KENAI, AK 99611	YES	429,600	NO	NO
055-423-37	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 8 BLK 4	416,000	7,550.63	0.00			HUNTLEY ARNOLD L	47649 WINRIDGE CT	KENAI, AK 99611	YES	416,000	NO	NO
055-423-38	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 7 BLK 4	29,200	7,300.00	250.63	250.63	266749 12/13/2021	VILLEGAS JANICE & ANDREW	47558 SOUTH BEND CT	KENAI, AK 99611	YES	29,200	YES	NO
055-423-39	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 6 BLK 4	30,700	7,550.63	0.00			CHRISTOPHER GRANT T	PO BOX 3633	SOLDOTNA, AK 99669		0	NO	NO
055-423-40	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 5 BLK 4	490,500	7,550.63	0.00			BERG MERCEDES & TIMOTHY R II	47628 WINRIDGE CT	KENAI, AK 99611	YES	490,500	NO	NO
055-423-41	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 4 BLK 4	424,800	7,550.63	0.00			SCHNEIDERS JAMES CL	47608 WINRIDGE CT	KENAI, AK 99611	YES	424,800	NO	NO
055-423-42	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 3 BLK 4	441,300	7,550.63	0.00			TRUJILLO RAMONA Z & JOSEPH L	47588 WINRIDGE AVE	KENAI, AK 99611	YES	441,300	NO	NO
055-423-43	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 2 BLK 4	433,600	7,550.63	0.00			BALDWIN CHRISTA M & JUSTIN L	47677 GRANT AVE	KENAI, AK 99611	YES	433,600	NO	NO
055-423-44	T 5N R 11W SEC 23 SEWARD MERIDIAN KN 2002042 SOUTH BEND BLUFF ESTATES LOT 1 BLK 4	29,800	7,450.00	100.63	100.63	266749 12/13/2021	BALDWIN CHRISTA M & JUSTIN L	47677 GRANT AVE	KENAI, AK 99611	YES	29,800	NO	NO
51		19,540,100	384,278.98	803.15	803.15		Paid in Full			40	16,442,600	1	
# Parcels				5 # of Prepayments required				as of 12/9/2021					

EXHIBIT 4

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MEMORANDUM

TO: Brent Hibbert, Assembly President
Members of the Kenai Peninsula Borough Assembly

THRU: Charlie Pierce,
Kenai Peninsula Borough Mayor

FROM: Brandi Harbaugh, Finance Director

DATE: 8/26/2021

RE: South Bend Bluff Estates Road Utility Special Assessment District (RIAD)
Financing

The Borough plans to provide the funds necessary to finance the South Bend Bluff Estates RIAD from internal sources. KPB 5.10.040 allows the investment of borough monies in special assessment districts that are authorized under KPB 14.31. The total of such investments is limited to not more than \$5,000,000 at the end of any fiscal year. As of August 26, 2021, the borough has \$942,142 invested in special assessment districts. If approved, the \$770,165 projected for the South Bend Bluff Estates RIAD, (RIAD), will increase the total special assessment district investment to approximately \$1,712,307.

The owners of property located within the RIAD will be required to make principal and interest payments each year for a ten-year period to retire the indebtedness to the borough. The rate of interest will be equal to the prime rate (currently 3.25%) plus 2% or 5.25%. Property owners can avoid or reduce the interest charge by making accelerated payments on the principal. Penalties will not be imposed for accelerated payments. The assessment constitutes a lien on each parcel within the district.

Kenai Peninsula Borough
 Currently Proposed USAD/RIAD Projects
 8/26/2021

		Current Proposal	Outstanding Proposals
Max Allowed		\$ 5,000,000	\$ 5,000,000
Current Balance(100.10706) as of:			
	8/26/2021	942,142	942,142
Previously Approved Projects:			
None		-	-
Projects Awaiting Approval:			
South Bend Bluff Estates RIAD		770,165	770,165
Total		<u>\$ 1,712,307</u>	<u>\$ 1,712,307</u>

7.0 COST ESTIMATING

7.1 Construction Cost

Itemized construction costs are provided in standard ADOT format. Unit prices are based work completed in south central Alaska during the 2020 & 2021 construction seasons.

7.2 Cost Adjustments

This report includes a minimal inflation factor, as well as a recommended contingency factor. The inflation factor is applied to the individual unit prices. The contingency factor is applied to the total estimated cost, not individual unit prices.

7.3 Utility Conflicts

This report details few utility conflicts as utility locates were limited to test hole locations. Several minor utility conflicts should be expected as described in section 3.5. There may be several effective measures for dealing with the potential conflicts from actual relocation of lowering to design modifications. For the purpose of this estimate utility relocations costs have been excluded.

8.0 ENGINEER'S ESTIMATED COST

Description	Cost
RIAD Subtotal: Estimated Construction Cost	\$598,615.00
KPB Subtotal: Estimated Design, Inspection & Project Administration, 10% of Estimated Construction Cost	\$59,861.50
Project Subtotal:	\$658,476.50
Contingency, 5%:	\$32,973.83
TOTAL ESTIMATED CONSTRUCTION COST	\$691,400.33

Attach: RIAD Map
Unit Cost Schedule
Typical Sections
Soil Analysis, Test Hole Logs & Map

mp - Total Est. Cost: \$691,450.33

Winridge Avenue, Winridge Court, Wispen Avenue, Grant Avenue, Southbend Court
2021 RIAD PROGRAM

ENGINEER'S ESTIMATED CONSTRUCTION COST - 8/20/2021

Pay Item No.	Pay Item Description	Pay Unit	Quantity	Unit Bid Price	Amount Bid
RIAD BASIC BID					
110(1)	Existing Utilities in Construction Zone	Lump Sum	All Required	(LUMP SUM)	\$ 4,500.00
202(4)	Remove Culvert Pipe	Linear Foot	560	\$ 12.50	\$ 7,000.00
203(9A)	Roadbed Widening, 24' Wide	Station	25.90	\$ 1,850.00	\$ 47,915.00
203(9B)	Roadbed Widening, Cul-De-Sac	Each	2	\$ 3,800.00	\$ 7,600.00
203(10)	Embankment Construction, 24' Wide	Station	3.5	\$ 7,800.00	\$ 27,300.00
203(13)	Tumaround Construction - Grant Avenue	Each	1	\$ 6,500.00	\$ 6,500.00
301(1)	Aggregate Base Course, Grading D-1	Ton	1625	\$ 32.00	\$ 52,000.00
302(2A)	Subgrade Modification, 24' Wide, 6" Depth	Station	6.5	\$ 950.00	\$ 6,175.00
303(1)	Reconditioning	Station	38.05	\$ 500.00	\$ 19,025.00
401(1)	Asphalt Concrete, Type II, Class B	Ton	1480	\$ 130.00	\$ 192,400.00
603(1-15)	15 Inch Corrugated Steel Pipe	Linear Foot	990	\$ 55.00	\$ 54,450.00
605(1)	Drainage Gallery	Linear Foot	600	\$ 20.00	\$ 12,000.00
615(2)	Remove and Relocate Existing Sign	Each	8	\$ 250.00	\$ 2,000.00
618(1)	Seeding (Hydraulic Method)	Lump Sum	All Required	(LUMP SUM)	\$ 5,500.00
639(1)	Gravel Residence Driveway Transition	Each	26	\$ 500.00	\$ 13,000.00
639(4)	Paved Driveway Apron	Each	51	\$ 750.00	\$ 38,250.00
639(5A)	Paved Driveway	Each	25	\$ 2,000.00	\$ 50,000.00
640(1)	Mobilization And Demobilization	Lump Sum	All Required	(LUMP SUM)	\$ 15,000.00
641(1)	Erosion and Pollution Control Administration	Lump Sum	All Required	(LUMP SUM)	\$ 4,500.00
641(2)	Temporary Erosion and Pollution Control	Contingent Sum	All Required	(CONTINGENT SUM)	\$ 2,500.00
643(2)	Traffic Maintenance	Lump Sum	All Required	(LUMP SUM)	\$ 5,000.00
650(1)	Miscellaneous Work	Contingent Sum	All Required	(CONTINGENT SUM)	\$ 20,000.00
670(1)	Painted Traffic Markings	Lump Sum	All Required	(LUMP SUM)	\$ 6,000.00
RIAD TOTAL ESTIMATED COST OF CONSTRUCTION					\$ 598,615.00

Prepared By:



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