RESOLUTION 96-27

TO ADOPT A WRITTEN FISCAL PLAN AND TO ESTABLISH A POLICY FOR THE PROVISION OF CITY SERVICES TO AN ANNEXED AREA (Capstone Development)

WHEREAS, the City of Bloomington desires to annex the area known as Capstone Development, which is more specifically described in Ordinance 96-55; and

WHEREAS, responsible planning and state law require adoption of a fiscal plan and a definite policy for the provision of City services to the annexed areas; and

WHEREAS, such a plan has been developed and presented to the Common Council, entitled, "Fiscal Plan, Annexation of Capstone Development";

NOW, THEREFORE, BE IT HEREBY RESOLVED BY THE COMMON COUNCIL OF THE CITY OF BLOOMINGTON, MONROE COUNTY, INDIANA, THAT:

1. The Common Council of the City of Bloomington, Monroe County, Indiana, hereby approves and adopts the Fiscal Plan, Annexation of Capstone Development, which Plan is attached hereto and made a part hereof, and hereby approves and adopts the specific policies for implementation of the Plan as set out therein.

2. Any monies necessary for the provision of services as described and itemized in the attached Plan shall be budgeted and appropriated from the applicable fund, pursuant to state law and the City's budget procedure.

3. It is anticipated that this annexation will not result in the elimination of jobs for employees of other governmental entities, but in the event it does, then the Director of Personnel of the City of Bloomington is hereby directed to assist such employees in obtaining new employment, but nothing herein shall require the City to hire any such employees.

PASSED and ADOPTED by the Common Council of the City of Bloomington, Monroe County, Indiana, upon this 18th day of December, 1996.

Patricia Cole

PATRICIA COLE, Vice President
Bloomington Common Council

SIGNED and APPROVED by me upon this 19 day of December, 1996.

JR Fernandez

JOHN FERNANDEZ, Mayor
City of Bloomington

ATTEST:

Patricia Williams

PATRICIA WILLIAMS, Clerk
City of Bloomington

SYNOPSIS

This resolution requests approval of the Fiscal Plan for the annexation of Capstone Development. A Fiscal Plan, which is required by state law, outlines a schedule for the implementation of the various services the City will provide to the annexed area.

FISCAL PLAN

ANNEXATION OF

CAPSTONE DEVELOPMENT

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City of Bloomington

FISCAL PLAN

ANNEXATION OF CAPSTONE DEVELOPMENT

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City of Bloomington

FISCAL PLAN
ANNEXATION OF
CAPSTONE DEVELOPMENT

List of Exhibits

Exhibit 1:	Map of the Annexation Area
Exhibit 2:	Contiguity Calculation of Annexation Area
Exhibit 3:	Certified Copies of City Ordinances Documenting City Boundaries
Exhibit 4:	Analysis of Terrain and Soil Types in Annexation Area
Exhibit 5:	Title 20 of the Bloomington Municipal Code
Exhibit 6:	Area Zoning Map of Annexation Area
Exhibit 7:	Census Data
Exhibit 8:	Master Thoroughfare Plan
Exhibit 9:	Map of Sewer Mains and Water Lines in Annexation Area
Exhibit 10:	Map of Sewer Mains and Water Lines in Comparable Areas
Exhibit 11:	USB Rules, Regulations, & Standards of Service
Exhibit 12:	Map of Fire Hydrants, Street Lights, & Street Signs in Annexation Area and Comparable Areas
Exhibit 13:	Standards of Utility Dept., Insurance Services Office, Ten States Standards
Exhibit 14:	Final Statement of Community Development Objectives & Projected Use of Funds
Exhibit 15:	1996 Fiscal Plan for Rehabilitation Assistance Funds as Adopted by the Common Council (Resolution 96-27)
Exhibit 16:	Map of Refuse Collection Routes
Exhibit 17:	Map Showing Parks & Recreation Site Locations Along With a Chart Listing Facilities and Activities Available at Each Park
Exhibit 18:	Map of the Two Mile Fringe Around the City

ANNEXATION OF CAPSTONE DEVELOPMENT

INTRODUCTION

The following Fiscal Plan, developed through the cooperative efforts of the City of Bloomington's Controller's Office, Planning Department, Engineering Department, Legal Department, Fire Department, Police Department, Street Department, Sanitation Department, Department of Public Works, Redevelopment Department, Utilities Department, Animal Shelter, Parks and Recreation Department, Human Resources Department, and Personnel Department represents the City's policy and procedure for the annexation of the following property: Capstone Development.

The cost estimates of the planned services to be furnished, methods of financing, and plan for the organization and extension of services to the Annexation Area are fully discussed. In addition, information is provided to compare the services proposed for the Annexation Area with other areas within the City's corporate boundaries with similar topography, patterns of land use and population density.

Effective Date

Indiana Code 36-4-7(C) provides that when a municipality annexes territory which lies wholly or partly within a fire protection district, the annexation ordinance takes effect on the second January 1 that follows the date the ordinance is adopted. Because the Annexation Area lies within the Perry-Clear Creek Fire District, the effective date of this ordinance will be January 1, 1998. Accordingly, subsequent sections of this Fiscal Plan stating that the City will provide services "upon annexation" refer to the effective date, January 1, 1998.

1.00 LOCATION

Annexation Area

The Annexation Area lies in Perry township section 2. The Annexation Area is contiguous to the City along 48% of its boundary. A copy of the Annexation Area contiguity calculation is attached and incorporated herein as Exhibit 2. The Annexation Area is located in the southeastern part of the city. Certified copies of the City Ordinances documenting the City corporate boundaries are attached herein as Exhibit 3.

There are approximately 20 acres of land within the boundaries of the Annexation Area.

2.00 TOPOGRAPHY

The Annexation Area has slopes in the predominant range of 2% to 12%. A more thorough analysis of the terrain and an analysis of soil types is attached and incorporated herein as Exhibit 4.

3.00 PATTERNS OF LAND USE

There is currently 1 property owners of 1 parcels in the Annexation Area according to County tax records.

Pursuant to Title 20 of the Bloomington Municipal Code, the Annexation Area is zoned as a Planned Unit Development (PUD). The figures for this fiscal will be calculated on 254 apartment units in the PUD.

4.00 POPULATION DENSITY

According to 1991 data from the Indiana University Center for Population Research and the U.S. Census Bureau, Monroe County has an average of 2.39 persons per household. There will be 254 apartment units in the Annexation Area, which gives an estimated population of 607. With the area's 20 acres this will give a population density of 30.4 persons per acre.

5.00 COMPARABLE NEIGHBORHOODS

Two areas (hereinafter, "Comparable Areas") within the City's corporate boundaries were selected in order to compare the proposed provision of capital and noncapital services to the Annexation Area with those services already provided within the City limits. The locations of the Comparable Areas as well as of the Annexation Area are shown on the map that was previously incorporated herein as Exhibit 1.

The purpose of this comparison is to ensure that noncapital services, such as police and fire protection and street and road maintenance, will be provided within one year after the date of annexation to the Annexation Area in a manner equivalent in standard and scope to those noncapital services provided in the Comparable Areas. In addition, the purpose of the comparison is to ensure that capital services, such as street construction, sewer facilities, water facilities, and storm water drainage facilities are provided to the Annexation Area within 3 years after the effective date of annexation in the same manner as those services are provided to the Comparable Areas.

A thorough analysis of terrain and soil types of the Annexation Area and the Comparable Areas was previously incorporated herein as Exhibit 4. A more in depth discussion of the Annexation Area and the Comparable Areas follows:

Annexation Area: Capstone Development

a. Location: The Annexation Area is bordered by Eton Mews Apartment complex to the north, Jackson Creek Shopping Center to the west, and Roger's Farm property to the south and east..

b. Topography: The Annexation Area has slopes of 2% to 12%

c. Patterns of Land Use: The Annexation Area is zoned Planned Unit Development (PUD).

d. Population Density: The Annexation Area will have approximately 607 people living on 20 acres for a density of 30.4 persons per acre.

Comparable Area I: Henderson Court and Winslow Ridge Complexes.

a. Location: Comparable Area I is bordered by Winslow Road to the south, Brandon Court Complex to the west, Winslow Farm subdivision to the east and E. Graham Drive to the north.

b. Topography: Comparable Area I has slopes of 6% to 12%.

c. Patterns of land use: Comparable Area I is zoned Residential Multi-family, 15 units per acre (RM15).

d. Population Density: The Comparable Area currently has approximately 643 people living on 20 acres for a density of 32.2 persons per acre.

Comparable Area II: Woodbridge III

a. Location: Comparable Area II is bordered by E. 10th St. to the south, Fountain Park Apartments to the north and west and Tamarron and Barrington Court Apartments to the east..

b. Topography: Comparable Area II has slopes of 6% to 12%.

c. Patterns of land use: Comparable Area II is zoned Residential Multi-Family, 15 units per acre (RM 15).

d. Population Density: The Comparable Area currently has approximately 672 people living on 20 acres for a density of 33.6 persons per acre.

6.00 GENERAL RELATIONSHIP TO CITY SERVICES

The Annexation Area is located in the southeastern part of the City. The relationship between the Annexation Area and existing incorporated city territory is shown on the map previously incorporated as Exhibit 1. City services are currently being provided to the City areas that border the Annexation Area.

The Annexation Area currently receives fire protection from the Perry-Clear Creek Fire District. Upon the annexation's effective date, the City will provide this service. City parks are already easily accessible to the Annexation Area. The Annexation Area already has access to the City's functions of planning and engineering services, building inspection and social service programs. For the reasons stated above and the reasons elaborated below, annexation of this area is a logical extension of the City's corporate boundaries.

7.00 COST OF SERVICES METHODOLOGY

The capital services within the Annexation Area were evaluated to determine what, if any, new facilities are needed to provide services to the area in the same manner as those services are provided to comparable areas within the City's corporate boundaries. Each capital service was assessed and, where required, specific improvements have been programmed. The findings and proposed improvements for each capital service are detailed in the following report. Non-capital services, which are delivered to the area without installation of capital facilities in the area, were assessed in consultation with the administrator in charge of the service. Some services are already available to the Annexation Area, while other services will have to be initiated. Such findings are detailed below. The requirements and cost of these new services were determined by the Controller's Office in consultation with the administrator in charge of each service based upon factors explained below. In each case, it is shown in this report that service is being or will be provided to the area to be annexed in a manner equivalent in standard and scope to the services being provided to Comparable Areas.

8.00 PROVISION OF SERVICES

8.01 SANITARY SEWER SERVICE

City sewer service is currently not provided to the Annexation Area. Sewer lines will be provided by the developer. The map indicating the locations of the sewer mains currently in place is attached and incorporated herein as Exhibit 9.

Maps showing the sewer main lines in the Comparable Areas are attached and incorporated herein as Exhibit 10. Sewer service in the Annexation Area and Comparable Areas is described as follows:

Annexation Area: City sewer is currently not provided to the Annexation Area.

Comparable Area I: All dwellings in this Area have sanitary sewer service. A publicly-owned, minimum 8" main in a manner comparable to other areas of the City.

Comparable Area II: All dwellings in this Area have sanitary sewer service. A privately-owned, minimum 6" main in a manner comparable to other areas of the City.

SUMMARY OF SANITARY SEWER SERVICES

COST ESTIMATE FOR PROVISION OF SERVICE: $0

METHOD OF FINANCING: Not Applicable

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: Sanitary sewer service is currently not available to the Annexation Area. Sewer lines will be provided by the developer. The City will incur no cost for sanitary sewer services as a result of this annexation.

8.02 WATER DISTRIBUTION

The City Water Utility is currently not serving the Annexation Area. Water lines will be provided by the developer. The map indicating the locations of the water mains currently in place is attached and incorporated herein as Exhibit 9. Utilities Service Board Rules, Regulations and Standards of Service for the City Water Utility are attached and incorporated herein as Exhibit 11. Water service in the Annexation Area and Comparable Areas is described as follows:

Annexation Area: City water is currently not provided to the Annexation Area.

Comparable Area I: The water mains serving this area are publicly owned ductile iron pipe of minimum 4" diameter.

Comparable Area II: The water mains serving this area are privately owned ductile iron pipe of minimum 2" diameter.

SUMMARY OF WATER FACILITIES

COST ESTIMATE OF PLANNED SERVICE: $0

METHOD OF FINANCING: Not Applicable.

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICE: The City Water Utility is currently not serving the Annexation Area. Water lines will be provided by the developer.

8.03 FIRE HYDRANTS

There are currently 0 fire hydrants available in the Annexation Area. Hydrants will be installed by the developer. The Comparable Areas all have fire hydrants installed according to the standards set by the Utilities Department, the Insurance Services Office, and the Ten States Standards. Generally, spacing varies between 350 and 600 feet, depending on these standards, with closer spacing required for industrial, commercial, and densely populated areas. The fire hydrant locations in the Comparable Areas are shown on the map attached and incorporated herein as Exhibit 12.

Fire hydrants are publicly owned and maintained. The rental charges for publicly owned hydrants are incorporated into the existing billing structure for water users within the City's corporate boundaries, as approved by Ordinance of the Bloomington Common Council and the Utilities Regulatory Commission. No General Fund expenses for fire hydrants will occur as a result of this annexation.

SUMMARY OF FIRE HYDRANTS

COST ESTIMATE OF SERVICE: $0

METHOD OF FINANCING: Not Applicable

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: The hydrant rental charge will be assumed by water users upon the effective date of annexation for those hydrants owned and maintained by the Utility Department.

8.04 STORM WATER DRAINAGE FACILITIES

Maintenance of the storm drainage facilities, upon development, within the Annexation Area will be private and remain so after annexation.

The storm drainage facilities within the Comparable Areas consist of curbed roadways and asphalt parking lots that empty into an enclosed system of pipes.

SUMMARY OF STORM WATER DRAINAGE FACILITIES

COST ESTIMATE FOR PROVISION OF SERVICES: $0

METHOD OF FINANCING: Not Applicable

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: Maintenance of the storm drainage facilities, upon development, within the Annexation Area will be private, and remain so after annexation.

8.05 STREET AND ROAD CONSTRUCTION AND MAINTENANCE

Roadways within the Annexation Area will be private and will remain so upon annexation. Therefore, the City will not provide street and road construction and maintenance services to the Annexation Area.

SUMMARY OF STREET AND ROAD CONSTRUCTION AND MAINTENANCE

COST ESTIMATE OF MAINTENANCE: $0.

METHOD OF FINANCING: Not Applicable.

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: All roadways within the Annexation Area will be private, and no street and road services will be extended to the area upon annexation.

8.06 STREET AND ROAD SERVICES

These services include routine pavement sweeping, routine leaf collection, and snow & ice removal for public roadways only. All roadways within the Annexation Area will be private, therefore no street and road services will be extended to the area upon annexation.

SUMMARY OF STREET AND ROAD SERVICES

COST ESTIMATE OF SERVICE: $0

METHOD OF FINANCING: Not Applicable

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: All roadways within the Annexation Area will be private, therefore no street and road services will be extended to the area upon annexation.

8.07 STREET SIGNS AND TRAFFIC SIGNALS

Street signs and traffic signals in the Annexation Area will remain private upon annexation.

SUMMARY OF STREET SIGNS AND TRAFFIC SIGNALS

COST ESTIMATE OF PLANNED SERVICES: $0

METHOD OF FINANCING: Not Applicable

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: No extension of street sign and signal services is planned for the Annexation Area, as all roads within the Annexation Area will be private.

8.08 STREET LIGHTS

The Board of Public Works of the City of Bloomington is responsible for the installation of public street lights. Street lights are installed by petition, consistent with the requirements set forth in I.C. Section 36-9-9-1, et seq. The petition shall be evaluated in relation to traffic, crime statistics, illumination levels, and availability of funds in a manner consistent with all areas within the corporate limits.

The Annexation Area has no street lights that will be publicly funded upon annexation.

SUMMARY OF STREET LIGHTS

COST ESTIMATE FOR PLANNED SERVICE: $0

METHOD OF FINANCING: Not Applicable.

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: Private street lighting will be provided to the Annexation Area to the same standard and scope as private lighting in the Comparable Areas.

8.09 SIDEWALKS

In general, the construction and maintenance of sidewalks is not the responsibility of the City, but that of the property owner. The curbs are generally constructed for a life of 20+ years, and require little if any maintenance. Sidewalks will be provided by the developer.

SUMMARY OF SIDEWALKS

COST ESTIMATE OF SERVICE: $0

METHOD OF FINANCING: Not Applicable

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: Sidewalks will be provided by the developer. No publicly funded sidewalk construction is planned in the Annexation Area.

8.10 ENGINEERING/HOUSING CODE INSPECTION

Owners and agents of rental properties within the City's corporate limits are required to register their properties with the City's Code Enforcement Office. These properties are then scheduled for housing code inspections every three or four years.

The Annexation Area will contain 254 rental units that will be added to the City's total registered rental units of approximately 13,500. When the annexation takes effect, the additional rental units will be absorbed into the existing three or four year inspection cycle.

The following is an estimate of the cost of conducting housing code inspections of rental units in the City of Bloomington:

	1995	1996	1997
Line 211: Office and Supplies	$1,800	$1,800	$2,200
Line 223/224/362: Garage & Motor Supplies	6,371	8,744	9,020
Line 242: Other Supplies	200	200	200
Total Cost Per Year:	$8,371	$10,744	$11,420

On a three year budget cycle, the total inspection cost is $30,535 ($8,371 + $10,744 + $11,420). This is a per unit cost of $2.26 ($30,535 / 13,500). Multiplied by the 254 rental units projected for the Annexation Area, the total yearly inspection cost is $574.04

SUMMARY OF HOUSING CODE INSPECTIONS

COST ESTIMATE OF SERVICE: $574

METHOD OF FINANCING: General Fund

PLAN FOR ORGANIZATION AND EXTENSION OF SERVICES: Upon the Annexation's effective date, the rental units in the Annexation Area will be registered and incorporated into the existing three to four year cycle of inspections. Rental properties will be inspected to the same standard and scope as those performed in the comparable areas. The housing code inspections will be performed with existing staff and operating resources.

8.11 REDEVELOPMENT DEPARTMENT SERVICES

The Department of Redevelopment administers programs for the implementation of Community Development Block Grants available to the City through the Federal Department of Housing and Urban Development. The annual grant amount is determined by the Federal Government and may be disbursed at the City's discretion among various eligible activities.

During fiscal year 1997 (May 1996 through May 1997), the City will receive Community Development Block Grants totaling $1,105,000 which will be allocated to various projects including: rehabilitation of housing for low/moderate income families on a city-wide basis; small scale drainage projects and site improvements in targeted low-income areas; economic development activities, various public service programs; and a utility service program for low-moderate income families.

Applications from eligible low/moderate income families from the Annexation Area for assistance through the housing rehabilitation program will be processed in the same manner as other eligible applicants.

The Redevelopment records indicate that there were no grants or loans for home rehabilitation to property owners in the Comparable Areas during the previous fiscal year.