

RESOLUTION 81-25

To Adopt a Written Fiscal Plan and Establish a Policy
for the Provision of Services to the 35-Acre Area
on the East Side of Walnut Street Pike South of Sherwood Oaks

WHEREAS, the City of Bloomington desires to annex the area described in Ordinance 81-79, a 35-acre site on the east side of Walnut Street Pike south of Sherwood Oaks; and

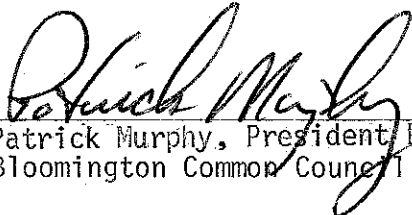
WHEREAS, responsible planning and state law require adoption of a written fiscal plan and a definite policy for the provision of services to annexed areas; and

WHEREAS, such a plan has been developed and presented to the Council:

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

The attached fiscal plan entitled "A Report on the Cost of Services for Annexation Ordinance 81-79" is hereby approved and incorporated as a part of this resolution.

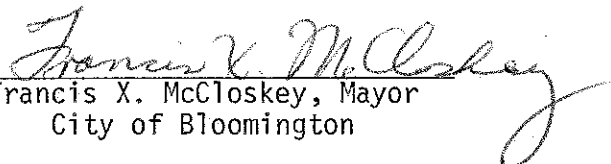
PASSED and ADOPTED by the Common Council of the City of Bloomington, Monroe County, Indiana, upon this 16th day of September, 1981.


Patrick Murphy, President Pro-Tem
Bloomington Common Council

ATTEST:


Nora M. Connors, City Clerk

SIGNED and APPROVED by me upon this 22nd day of September, 1981.


Francis X. McCloskey, Mayor
City of Bloomington

SYNOPSIS

This resolution, required by state law, adopts a written fiscal plan and establishes a policy for the provision of services to the 35-acre site on the east side of Walnut Street Pike south of Sherwood Oaks that is being annexed by Ordinance 81-79.

A REPORT ON THE COST OF SERVICES

Annexation Ordinance 81-79

35 Acres on the East Side of Walnut Street Pike South of Sherwood Oaks

Prepared by:

Bloomington City Planning Department

August 26, 1981

Participating Staff:

Tim Mueller	Planning Department
Dan Neubecker	Planning Department
Chris Spiek	Planning Department
Jenny Wetmore	Planning Department
John Goss	Deputy Mayor
Qamar Shaikh	Engineering Department
Talakshi Gala	Utilities Department
David Hamilton	Fire Department
Richard Post	Police Department
Roger Branam	Street Department
Ken Friedlander	Sanitation Department
Lou Stonecipher	Transit Director

INTRODUCTION

Purpose

Indiana law requires that before an area can be annexed (1) it must have a resident population of at least three persons per acre; or be zoned for commercial, business, or industrial uses; or be 60% subdivided; (2) at least one-eighth of its aggregate external boundaries must coincide with the annexing city; and (3) the annexing city must have developed a written fiscal plan and established, by council resolution, a definite policy showing cost estimates of planned services and the method of financing them, the plan for extension of services, a statement that non-capital services will be extended within one year of annexation and capital services within three years, and a plan for hiring employees of other governmental entities whose jobs will be eliminated by the annexation. This report will establish that those requirements have been met.

This report achieves that purpose for the area to be annexed by Ordinance 81-79.

Area Description

The area to be annexed, shown on Exhibit A, lies south of and abutting the Sherwood Oaks Subdivision. It is bounded on the West by Walnut Street Pike, and includes the east half of the Walnut right-of-way. The area accommodates five large parcels with five single residences and a church, and the site of the forty-unit first phase of the Meadowridge residential development. This report addresses the costs related to the existing development of the five large parcels and the proposed 40 units of Meadowridge phase one.

General Relation to City Services

The area to be annexed lies at the edge of the city's incorporated area, abutting incorporated area to the north and to the west across Walnut. Walnut Street from the city south to the north line of this area is already within the city and receives city services, including transit service on Walnut Street. Water is available on Walnut Street and sanitary sewer is available to the north and south of the area. Winslow Park and Sports Complex is about 4,000 feet from the area.

Planned services of a capital nature will be provided to this area within three years of the effective date of the annexation in a manner that is equivalent in standard and scope to capital services provided to areas within the city that have similar topography, patterns of land utilization, and population density. Non-capital services will be provided within one year of the annexation in the same manner as specified above.

COST OF SERVICE METHODOLOGY

Capital Costs

Field inventories were conducted by the Bloomington City Planning and Engineering Departments to assess the extent and condition of street facilities and storm drainage conditions in the area to be annexed. Existing sanitary sewer and water distribution facilities in or adjacent to the area were mapped, and extensions needed to serve existing development in the area to be annexed were identified by the City Utility Engineer.

Non-Capital Costs

Non-capital service needs were evaluated in two ways. The Planning Department made initial assumptions as to the ability of each service department to absorb the area; based upon the department's reports on the nearby current annexations, these assumptions were confirmed by the service departments, and are summarized in the following sections. Certain services will

be provided using existing personnel and equipment resources. In the case of those services, only out-of-pocket costs will be incurred in serving the newly annexed area. The Planning Department reviewed the service department's 1981 budgets to identify the lines which represent the out-of-pocket costs which will be incurred in serving the newly annexed area. These costs were divided by appropriate measures, such as number of dwelling units or lineal feet of street, to arrive at factors which could be applied to the parameters of the proposed annexation.

CAPITAL SERVICE COSTS

Streets

Approximately 1,950 feet of the east half of Walnut Street will be annexed. A field inventory has determined that the street is in good condition and of a cross-section appropriate to its service demands. The rural cross-section, with no sidewalks or street lights, and with roadside drainage swales, is comparable to conditions which prevail in many similar areas of the city. The City's philosophy of improvement, as evidenced by the Bloomington Area Transportation System Management Program (which summarizes current and proposed improvement activities) and by the City's Capital Improvement Program, is one of attention to the areas of greatest need, with no intent to upgrade numerous streets of characteristics similar to Walnut in this area. For that portion of Walnut abutting Meadowridge (630 feet), the developer will be responsible, as required by the applicable regulations, for a sidewalk and for appropriate improvements to Walnut at the new intersection. All interior streets in the new development are to be built by the developer as required by applicable regulations. No street related capital costs will be borne by the City.

Sanitary Sewer

Service to the existing structures north of Meadowridge will require an extension from the existing line just south of the area. Applicable development regulations require that new development be responsible for the provision of internal sewer systems. Within the Meadowridge development, applicable regulations and terms of the City's approval of this development require that these facilities be installed by the developer. The area will be fully served by sanitary sewer facilities meeting current City specifications.

Water Distribution

Service in Walnut Street is already available to all existing development in the area. Within the Meadowridge development, applicable regulations and terms of the City's approval of this development require that these facilities be installed by the developer. The area will be fully served by water distribution facilities meeting current City specifications.

Storm Drainage

Public storm drainage needs for the existing development north of Meadowridge and for Walnut itself are served by the roadside ditch on the east side of Walnut Street and the culvert under Walnut adjacent to the Church Drive.

The nature of these facilities is consistent with the manner in which storm drainage service is provided to areas of similar characteristics within the city. The city's storm drainage facilities vary widely depending upon the requirements prevailing at the time of development, topography, population density, and other characteristics. The system includes extensive areas, some fully developed, served by roadside ditches and culverts in a manner similar to the facilities in this area. The city's philosophy of storm drainage system improvements, as evidenced in the major watershed studies and programs, the ongoing small scale drainage projects, and the neighborhood plans for areas eligible for Community Development Block Grant funding, is one of reliance on a mixed system including open facilities and rehabilitation or improvement, rather than replacement where needed. However, the size of the culvert under Walnut is insufficient to accommodate the discharge from the area in its present state of development under the 10-year storm condition typically used by the city in its facilities planning. The present 26" culvert would have to be upgraded to 42" at an estimated cost of \$11,000. No other deficiencies

exist. The cost of this improvement will be covered in the City's Capital Improvement Program for Small Scale Drainage Projects during the next three years.

Within the Meadowridge development, applicable regulations and terms of the City's approval of this development require that these facilities be installed by the developer. The storm drainage system will be built to current standards and will include a storm water retention basin to prevent adverse impacts downstream.

NON-CAPITAL SERVICE COSTS

Street Maintenance

The maintenance needs of this area will be absorbed by existing personnel and equipment. Increased out-of-pocket and material costs are expected with the addition of any roadway to the City. The following Public Works budget lines will vary with the length of street served.

Repairs	\$ 30,000
Garage & Motor Supplies	45,000
Repairs	40,000
Other Materials	19,000
Street Reclamation Projects	<u>45,000</u>
(sand, salt, street reclamation)	
 TOTAL	 <u>\$179,000</u>

The City maintains approximately 312 lane miles, for an average annual out-of-pocket cost of \$573.72 per lane mile. The annexation adds 5790 feet of lane or 1.0964 lane miles for an out-of-pocket annual service cost of \$629. This amount will be covered in the budget for 1981 and subsequent years.

Fire Protection

The Fire Department can serve this area in its present state of development without additional crew or equipment. The Department already covers areas south of this area and abutting it on the north and west. The Fire Department reports that reasonable response can be achieved as follows: Fire Station #1 which is located on West Fourth Street between College Avenue and Walnut Street would respond by travelling west on Fourth to College Avenue, turning south on College Avenue to West Second Street, turning east on Second Street to Walnut Street, turning south on Walnut Street to the area. Station #4 which is located at 2201 East Third Street would respond by travelling west on Third Street to High Street turning south on High to Winslow Road, travelling west on Winslow Road to Walnut Street Pike or to South Highway 37 (South Walnut Street), turning south on Walnut Street Pike or S. Highway 37 (S. Walnut Street) to the area.

Out-of-pocket costs that will accrue from this annexation relate to the department's two programs: fire prevention and fire fighting. Since this service to this annexation will be absorbed by existing manpower and equipment, only the following budget lines will vary with service to the new area:

	<u>Fire Prevention</u>	<u>Fire Fighting</u>	<u>Total</u>
Gasoline	\$5,100	\$11,300	
Oil	100	250	
Other Garage & Motor	<u>150</u>	<u>500</u>	
 TOTAL	 \$5,350	 \$12,050	 <u>\$17,400</u>

Based upon the 837 responses experienced by the department in 1979, the out-of-pocket cost per response is \$20.79. The frequency of response being experienced is one call per 121 dwelling units per year. This area includes 45 dwelling units plus one church, assumed here to have the same call frequency, so that an average 0.38 calls can be anticipated; out-of-pocket costs are negligible.

Police Protection

The police department can serve this area without additional personnel or equipment. The department already patrols the street which abuts the area and is responsible for the adjacent Sherwood Oaks and Willow Manor developments.

The only police program that will experience increased out-of-pocket costs due to this annexation is the crime control program. Although it could be contended that no expenses are incurred because the patrols are driving when not on call, this analysis assumes that costs will be incurred for each call. The following budget lines will vary with area served.

Repairs, Equipment	\$26,340
Gasoline	72,189
Oil	2,997
Tires	2,447
Other Garage & Motor Supplies	1,655
Other Equipment	13,160
TOTAL	<u>\$118,788</u>

22,427 calls were experienced in 1979, so that the average out-of-pocket cost per call is \$5.30. The rate for residences is based upon experience in a sample subdivision, Cascades Addition, which experienced only 5 calls in 1980, an average of only .05 calls per unit for the 103 households in Cascades. The 45 residences in this area can be expected to generate a total of 2.25 calls per year for a negligible average annual cost of \$11.93.

Sanitation

The area to be annexed will require no new equipment or personnel. Service will be incorporated into existing collection routes. Only out-of-pocket costs, in terms of additional labor costs and equipment operating costs for the time involved, will be incurred with service to the annexation.

City collection service is provided on a curbside pick-up basis. It is assumed for this analysis that all single residences and one-half of the multi-family residences in the City receive collection service. The following budget line items may be expected to vary with area served:

Repairs to Equipment	\$ 9,000
Tires	6,600
Gas, Oil, Motor Supplies	49,000
Repair Parts	21,840
TOTAL	<u>\$86,440</u>

Using the assumption mentioned above, annual cost per dwelling for the 10,727 units being served is \$8.00. The 45 new units to be served will cost \$360 per year. Increased labor costs are estimated by the sanitation director to be \$675 per year, for a total out-of-pocket increase of \$1,035. This increased cost will be covered by the amounts budgeted for 1981 and subsequent years.

Transit

The area to be annexed has been served by Route 2 for several years, with service on Walnut Street within walking distance of the area (Willow Manor entrance).

Animal Control

The shelter already serves the Monroe County areas outside of the City. The animal control program which responds to calls provides service to the City only. The area to be annexed will not require any new equipment or personnel. Only out-of-pocket costs associated with service to the new area will be incurred with annexation. The following budget lines will vary with area:

Repairs to Vehicles and Equipment	\$1,250
"Pager" for Emergency Calls	325
Garage and Motor Supplies	3,500
Equipment	<u>250</u>
TOTAL	<u>\$5,325</u>

These variable costs average \$.30 per household for the City's current estimated household count of 17,775 (1980 census). The annexation area, with 45 dwellings, is expected to accrue a negligible annual out-of-pocket service cost of \$13.50

Administration, Parks, and Other Service

Annexation of the magnitude of this proposed area will not significantly alter the service demands upon City departments with functions that are not specific to a particular area. Administrative costs will not be affected. Park service is available to the area whether in or out of the City, and Planning, some engineering services, zoning and building, inspection and enforcement, are already provided to this area of the City's two-mile fringe planning jurisdiction.

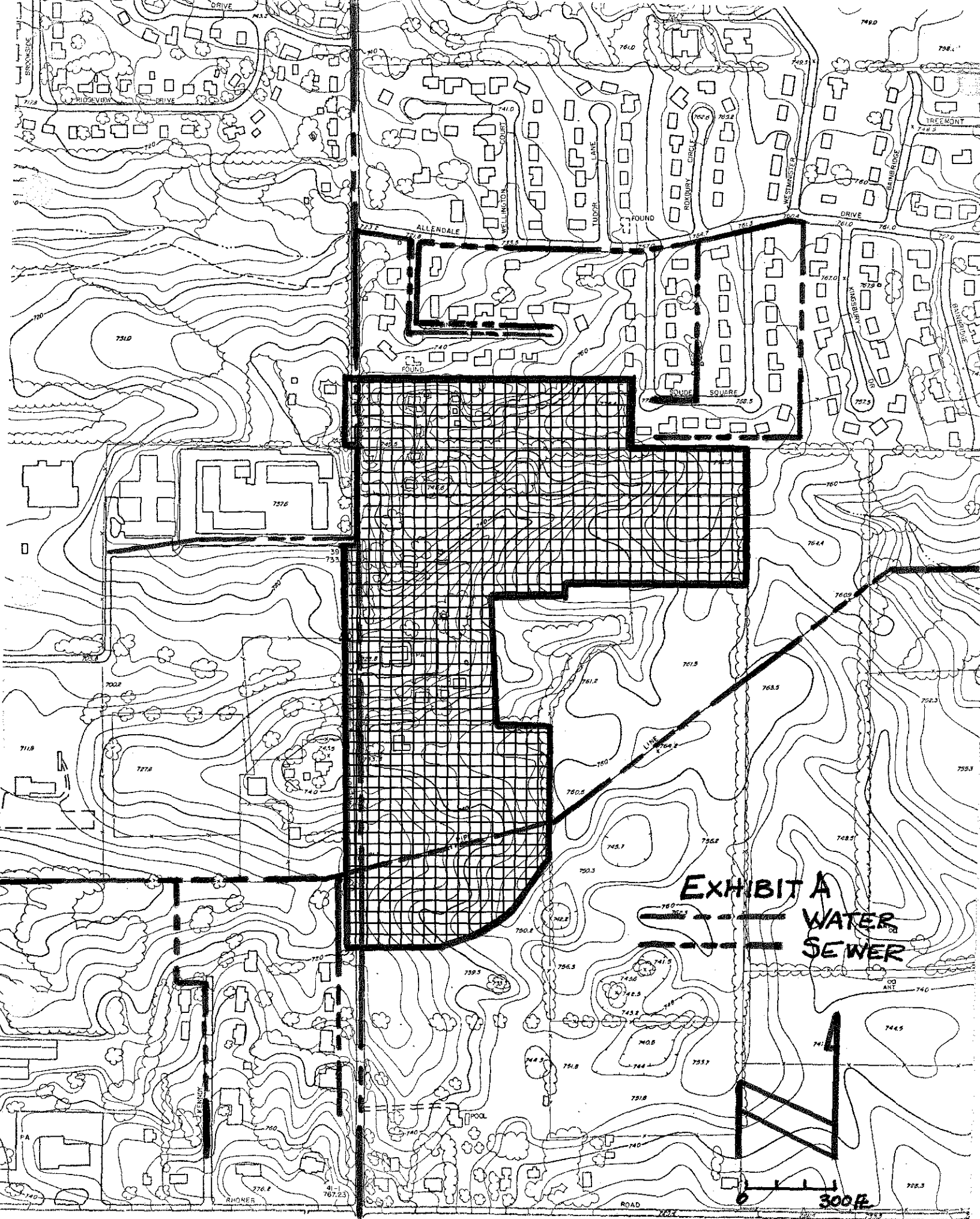
HIRING PLAN

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 is directed to assist these employees in obtaining new employment. However, the city will not be required to hire any of these employees.

CONTRIBUTION TO FUTURE INCREMENTS

This report is intended to satisfy the statutory requirements that cost of services be identified and programmed. As such, it does not address the contribution of this annexation, in combination with other future annexations, to the eventual need for additional equipment and personnel in various service departments.

Any monies necessary for the provision of services as described and itemized in this plan will be budgeted and appropriated from the city's General Fund, Utilities Fund, or Motor Vehicle Highway Fund, pursuant to state law and the city's budget procedures.



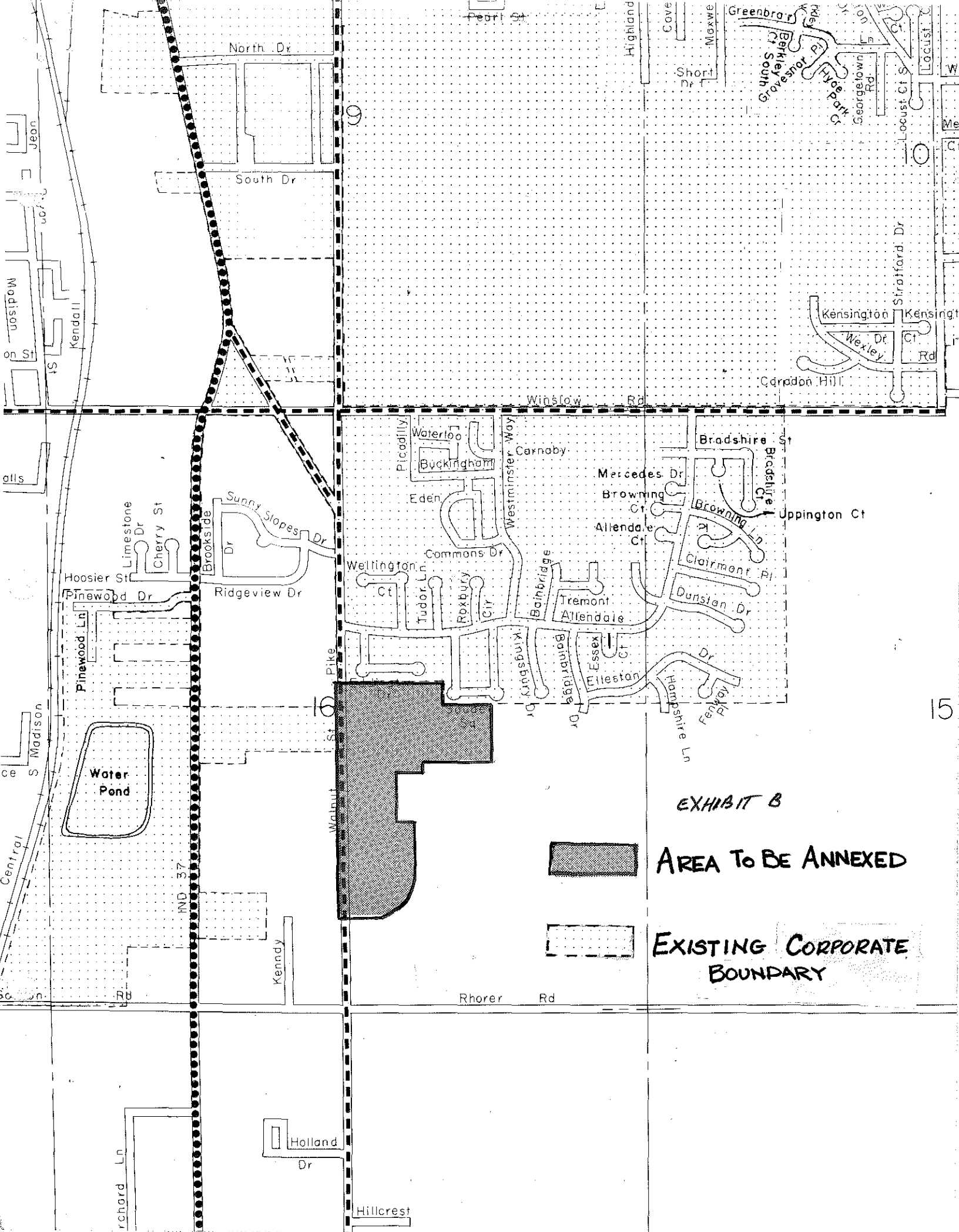


EXHIBIT B



AREA TO BE ANNEXED



EXISTING CORPORATE
BOUNDARY