Resolution 08-01

A RESOLUTION ADOPTING A FISCAL PLAN FOR THE ANNEXATION OF LANDS DEFINED IN ORDINANCE 07-22 AND 07-38

WHEREAS, the lands proposed to be annexed are contiguous to the City boundaries of the City of Westfield; and,

WHEREAS, IC 34-4-3-13 requires the City Council to adopt, by resolution, a fiscal plan for serving the area proposed to be annexed.

NOW THEREFORE BE IT RESOLVED that a fiscal plan is hereby attached to this Resolution and is incorporated as part of the Resolution as Exhibit "A".

WESTFIELD CITY COUNCIL
HAMILTON COUNTY, INDIANA

Voting For	Voting Against	Abstain
Kenneth Kingshill	Kenneth Kingshill	Kenneth Kingshill
Robert Horkay	Robert Horkay	Robert Horkay
John Dippel	John Dippel	John Dippel
Bob Smith	Bob Smith	Bob Smith
Tom Smith	Tom Smith	Tom Smith
Rob Stokes	Rob Stokes	Rob Stokes
Melody Sweat	Melody Sweat	Melody Sweat

ATTEST:

Cindy Gossard, Clerk-Treasurer

Fiscal Plan for the Annexation of the SR 32 North Annexation

Parcels located on the north side of SR32 and Running from Wheeler Road nearly to the Boone County Line Road

This Fiscal Plan Supports
Ordinance 07–22
Ordinance 07-35

This Fiscal Plan is
Exhibit A
Referenced in
Resolution 08-01

Introduction

The purpose of this report is to outline the estimated fiscal impact of annexation upon the Town (City) of Westfield and ability of the Town (City) to provide necessary municipal capital and non-capital services to an area proposed for annexation. The area proposed for annexation that is analyzed in this report is referred to as "SR32 North Annexation" and is generally located between Wheeler Road and the Boone County Line Road running along the north side of SR 32 approximately 300 feet and five parcels between Dartown Road and North Tomlinson Road approximately 300 feet north of SR 32.

The Indiana Statutes (IC.36-4-3-13(d)) governing annexation activity by the Town (City) of Westfield require the preparation of a written fiscal plan and the establishment of an annexation policy by resolution, as of the date of the annexation ordinance. The fiscal plan is required to present cost estimates and a plan for the extension of municipal services to the areas proposed for annexation. Municipal services of a non-capital nature are required to be provided within one (1) year of the effective date of the annexation ordinance to the extent that such services are equivalent in standard and scope to those services already provided within the city limits. Likewise, municipal services of a capital improvement nature are required to be provided within three (3) years of the effective date of the annexation ordinance.

This report contains an estimate of the project revenues and expenditures that will result from the annexation of certain territory by the Town (City) of Westfield. While the Town (City) is committed to providing the highest quality service to all areas of the community, the dollar figures presented here are only estimates and are subject to change. Variations may occur depending upon the rate and extent of future development, an increase or decrease in the cost of providing municipal services, or fluctuations in future property assessments.

Participants Involved in Developing the Fiscal Plan for the Annexed Area

Acting Town (City) Manager Bruce Hauk, Police Chief Bryan Foster, Fire Chief Gary Southerland, Westfield Public Works Assistant Director Kurt Wanninger, Director of Community Development Gregory J. Anderson, and Public Safety Director Dennis White.

In addition, financial consultants from O.W. Krohn Associates were consulted with the creation of the fiscal plan.

Town (City) of Westfield
Annexation Philosophy and Plan

The proposed SR 32 North Annexation is part of a larger, more comprehensive annexation plan and philosophy that has been in existence in the Westfield community for more than 10 years.

Although not currently confirmed through a resolution, the following philosophy will be forthcoming to represent the Town's annexation plan.

Fiscal Policy of the Town (City)

It is appropriate to state that the annexation policies of the Town (City) are expected to correspond with the fiscal policies of the Town (City). Therefore, it is the policy of the Town (City) of Westfield that annexation should only be undertaken under circumstances which are not adverse to the fiscal interests of the current residents and taxpayers of the Town (City) of Westfield.

General Philosophy and Plan

The philosophy and plan of the Town (City) of Westfield is to annex real estate into its corporate limits in accordance with the terms of Title 36, Article 4, Chapter 3 of the Indiana Code. The adoption of an ordinance authorizing such annexation shall:

1. Provide the residents of the Town (City) of Westfield with a broad, stable and growing economic tax base;

2. Plan for the quality and quantity of urban development in a coordinated manner;

3. Preserve and enhance the public health, safety, and welfare, of all Town (City) residents; and,

4. Allow for the provision of services to the new area in a cost effective manner that will not significantly impact existing residents.

Further the Town (City) Shall:

A. First seek the voluntary annexations of new development contiguous to the current Town (City) boundaries. It is certainly the preference of the Town (City) of Westfield to implement annexation action under the most amenable conditions possible, therefore in cases where it is practical and possible to achieve consensus the Town (City) prefers to precede with annexation under the "voluntary" provisions of the statute (IC36-4-3-5);

B. Enhance the existing assessed valuation of our municipality through voluntary annexations such that future annexations of "built out" neighborhoods can be achieved without tax differentials being the overriding issue being debated;

C. Consider any requests for voluntary annexation from existing neighborhoods; and,

D. Consider any forced annexations that will positively impact the future economic development opportunity of the community.

Financial Incentives in Support of Annexation

Aside from the issue of municipal services, the Town (City) has developed annexation and growth policies with support for the concept of applying economic incentives to the annexation policies as a basis for building public support and popular consensus. The financial incentives possibly considered by the Town (City) of Westfield include:

- tax abatement (IC36-4-3-8.5);
- delay of the effective date of the annexation (IC36-4-3-8);
- negotiation of supplemental services (based on surplus tax revenues);
- elimination of utility/services surcharges;
- appropriate arrangements as provided by IC36-4-3-21; and,
- agricultural tax liability exemption for municipal taxes provided by IC36-4-3-4.1.

It is the fundamental position of the Town (City); however, that the extension of such financial incentives shall be made primarily in those cases where it is appropriate to the fiscal and governmental interests of the Town (City) of Westfield.

Requirements of Indiana Law

The Town (City) Council of the Town (City) of Westfield is granted the authority under Indiana law to annex land that conforms with the terms of Title 36, Article 4, Chapter 3 of the Indiana code. The minimum criteria used to determine the eligibility of land for annexation must establish that:

1. The territory sought for annexation is contiguous to the corporate boundary of the municipality; or

2. The territory sought for annexation is not contiguous to the corporate boundary of the municipality, but is occupied by a municipally owned or operated airport or landing field; or

3. The territory sought for annexation is not contiguous to the corporate boundary of the municipality, but is occupied by a municipally owned or regulated sanitary landfill, golf course, or hospital.

Additionally the following criteria are also used to further determine the eligibility of land for annexation and must establish that:

1. The boundary of the area proposed for annexation must be at least 1/8 contiguous to the present corporate limits of the municipality, and
    a. have a population density of at least three persons per acre; or
    b. be zoned for commercial, business, or industrial use; or
    c. be at least 60% subdivided;

2. The boundary of the area proposed for annexation must be at least ¼ contiguous to the corporate limits of the municipality, and the area must be needed and can be used by the municipality for its development in the reasonably near future.

The preparation of a written fiscal plan is also required to outline the provisions for:

1. The cost estimates of planned services to be furnished to the area proposed for annexation;

2. The method or methods of financing the planned services;

3. The plan for the organization and extension of planned services;

4. The provision of planned services or a non-capital nature within one (1) year of the effective date of annexation; and,

5. The provision of planned services of a capital improvement nature within three (3) years of the effective date of annexation.

The fiscal plan must also discuss the provisions to be made to ensure the delivery of capital and non-capital services in a manner equivalent in standard and scope to those services currently being provided to other areas within the corporate boundary regardless of topography, patterns of land use, and population density. This document is intended to serve as the aforementioned fiscal plan.

Parcel Analysis

A. Location

The area proposed for annexation is generally located along SR 32 from Westfield's corporate limit at Wheeler Road west to the Boone County line. This area extends West between Austrian Pine Way to the Hamilton / Boone County Line Road running along the north side of SR 32 approximately 300 feet and five parcels between Wheeler Road and extending west to within 300 feet of Commerce Drive approximately 300 feet north of SR 32 (See attached Exhibit "A").

B. Contiguity

The area considered for annexation is contiguous to the corporate boundary of the Town (City) of Westfield. The perimeter of the parcels measure approximately 12.85 miles.

The area is contiguous to the Town (City) for 10.79 miles, which meets the statutory requirements of ¼ contiguity.

C. Size

The area proposed for annexation encompasses an area of approximately 0.247 square miles (approximately 158 acres)

D. Population

The population of the area proposed for annexation is estimated to be 69 persons. Census Tract and Block statistics from the 2000 Census of Population and Housing indicate an average of 2.84 persons per dwelling unit for Washington Township. The parcels do not have a population density greater than three (3) persons per acre.

E. Structures

Type	Number
Residential (Households)	24
Commercial	---
Industrial	6
Institutional	---
TOTAL	**30**

F. Patterns of Land Use

Type	Acres	Percent
Residential	102	64.56 %
Commercial	3	1.90 %
Industrial	36	22.78 %
Institutional	-	0.00 %
Public Right of Way	TBD	0.00 %
Undeveloped	17	10.76 %
TOTAL	**158**	**100%**

G. Zoning

The area proposed for annexation is currently located within the planning and zoning jurisdiction of the Town (City) of Westfield through a joinder agreement with Washington Township served by the Advisory Plan Commission. If annexed, the parcels will remain in the same planning jurisdiction.

Zoning designations in the proposed annexed area include: Agricultural Single Family (AG-SF1); Single Family 5 (SF5); Open Industrial (OI); Enclosed Industrial (EI); General Business (GB); Multiple Family – 1 (MF-1); Planned unit Development District (PUD); Local Business (LB); and Local Business Historical District (LB-H). Upon annexation none of the adjoining designations will change.

H. Property Tax Assessment

The 2005 pay 2006 total net assessed valuation of all real property and its improvements located within the area proposed for annexation is $6,130,600.

I. Municipal Property Tax Rate

The existing 2005 pay 2006 property tax rate assessed to all real property and its improvements within the area proposed for annexation is $2.44 per $100 of assessed valuation. This is the total Washington Township tax rate.

J. Council District

The areas for the proposed annexation will be incorporated into Council Districts 3 & 4.

Municipal Services

The Town (City) of Westfield currently extends to its citizens a diverse range of public services. These services are provided by six different municipal departments. Each department has a unique and separate function within the municipal service system of the Town (City). These departments include: Police, Fire, Public Works, Administration, Parks and Recreation and Community Development.

Each of the municipal service sectors are analyzed in this section to determine the impact of annexation on their ability to provide both capital and non-capital services to the area proposed for annexation as required by Indiana law. The method used to determine the fiscal impact of annexation is known as fiscal impact analysis.

Fiscal impact analysis is a method of evaluation that is used to measure and project the direct public costs and revenues associated with residential and nonresidential growth within a municipality. It explores public (government) costs and revenues. It does not consider private costs of public actions. Therefore, special assessments on real property or the value of land dedications required of developers are considered private revenues. Individual services contracted for homeowners associations, neighborhoods, and similar groups are also considered private.

Fiscal impact analysis has been used throughout the United States for nearly seventy-five years as a means of objectively evaluating development proposals, including those involving annexation. Throughout its tenure as a fiscal management tool of local government, fiscal impact analysis has evolved along with the maturation of the towns and cities in which it has been used. We are using two of the methods of fiscal impact analysis known as Per Capital Multiplier and Case Study.

Per Capita Multiplier

The per capita Multiplier method is the most widely used and relies on average municipal costs per person as an indicator of future costs incurred due to various types of development. This method is commonly employed in situations where service infrastructure bears a close relationship to service demand such that average costs of providing services to current users is as reasonable approximation of the cost to provide similar services to future users.

Case Study

The Case Study method of fiscal impact analysis is applied in very large, stable or declining cities, or very small, rapidly growing rural fringe areas. These communities typically exhibit excess or deficient service capacity. It projects future costs based on future demand determined by interviewing municipal department heads. This method assumes that each department head knows best the functional capacity of their agency and can respond most accurately to specific questions about existing and future service demand and the costs associated with the extension of services.

All municipal departments were analyzed to determine the extent of the affect of annexation. The Police, Fire, Public Works, Administration, Parks and Recreation and Community Development departments were identified as being affected by the annexation of new territory. The affect on some of these departments was determined to be minimal and are likely to create no demand for additional personnel and associated expenditures. It can therefore be assumed that these departments are characterized by an excess service capacity, and that the area proposed for annexation will not affect the workload of these departments or cause the need for additional expenditures associated with the provision of services. The existing levels and costs of service provision for each department are outlined below:

A. Police Department

The 29 uniformed officers of the Town (City) of Westfield Police Department provide the citizens of Westfield with public safety and emergency response service throughout the corporate limits of the Town (City). The individual services include: neighborhood patrols for the prevention of crime; detection and apprehension of criminal offenders; resolution of domestic disputes; anti-crime and anti-drug public education; traffic control and accident reporting; and the creation and maintenance of a general feeling of security and safety throughout the community.

The services provided by the Police Department vary in their individual requirements for personnel and financial resources and are subject to annual review and approval by the Westfield Town (City) Council.

Annual Operating costs associated with the addition of 1 uniformed police officer include salary, overtime pay, holiday pay, clothing and uniform allowance, health insurance, training, pension benefits and administrative overhead.

Capital one time costs associated with the addition of 1 uniformed police officer include a patrol vehicle and related equipment. These costs have been factored together to arrive at necessary service level increases for various areas under consideration for annexation.

The area identified for annexation includes 234 acres and an estimated population of 120 persons. The Town (City) of Westfield will provide police service to the proposed annexation area upon the effective date of annexation through the extension of an existing patrol area.

Provisioning of planned service of a non capital nature within one year.

The services can be provided for the annexed area with existing personnel. Any additional cost for overtime for police officers in the amount of $15,000 can be accommodated with the existing budget.

Provision of planned services of a capital improvement nature within three years.

Any additional capital requirements can be accommodated in future budgets through the annual budgeting process.

B. Fire Department

The 51 firefighters and EMS personnel employed by the Town (City) of Westfield Fire Department respond to fire emergencies, chemical and hazardous material spills, and general life safety emergencies through the corporate limits of Westfield and through the remainder of Washington Township, Hamilton County. The personnel of the Fire Department are assigned to two (2) fire stations located on Dartown Road and 151st Street, respectively. Each station is the primary respondent to emergencies within its assigned geographical area. Secondary response is provided by personnel and equipment by volunteer and paid city and town fire departments in adjacent communities.

The existing Fire Department currently has the entire responsibility for services throughout Washington Township; therefore, the annexation of this new territory will not change the impact or the need for additional personnel.

Current costs associated with fire services in Washington Township, where operating costs and capital costs have been calculated at $173 per person.

Provisioning of planned service of a non capital nature within one year.

The services can be provided for the annexed area with existing personnel because current services already serve the entire township.

Provision of planned service of a capital nature within three years.

The capital services required for future growth in the fire services for Washington Township will be managed through the annual budgeting process.

C. Public Works - Street Department

The street department of the Town (City) of Westfield is part of the Public Works Department and has responsibility for the maintenance and upkeep of all streets and public rights-of-way within the Town limits of Westfield. Maintenance activities include potholes and curb repair, mowing of weeds and other vegetation, street sweeping, sign maintenance and replacement, pavement striping, and snow removal. It is also responsible for reconstruction of sidewalks and removal of dead or damaged trees from Town (City) rights-of-way.

Other responsibilities include resurfacing and reconstruction of all public roads with the exception of the roads falling under the jurisdiction of the Indiana Department of Transportation or the Hamilton County Highway Department. These operations are primarily funded form the Motor Vehicle Highway (MVH) fund, the Local Road and Street Fund (LR&S), and the Road and Street Improvement Fund.

There are approximately 1,700 lineal feet of public roads proposed in the annexation area. These roads include parts of the following named roads: Wheeler Road; Spring Mill Road; Mule Barn; Casey Road; Eagletown Road Centennial Road Joliet Road Hamilton Boone Road.

Provisioning of planned service of a non capital nature within one year.

The street department services can be provided for the annexed area with existing personnel with possible overtime expenditure not to exceed $10,000. This additional expenditure can be accommodated within the current budget.

Provision of planned service of a capital nature within three years.

The capital services required for the new area will be achieved through increased MVH and LR & S funds received through the expanded road mileage formulas that result in funds from the State. Road improvements are evaluated each year and the new annexed area would be in that annual review process for consideration of improvements.

D. Public Works Department - Water and Sewer Services

The Westfield Public Works department is responsible for the operation of the Water and Wastewater works for the Town (City) of Westfield. Services for both water and sewer are provided within the corporate limits and into portions of Washington Township.

The proposed area for annexation is currently not served by Town (City) water and sewer service and would have to be provided within the three (3) year capital service requirements.

Utility Service

The Town (City) of Westfield will provide access to sewer and water utility service for any proposed development, with the costs for connecting to that utility service to be borne by the developer/owner, in accordance with the policies and fee structure set forth by the Westfield Town (City) Council.

The development policies of the Town (City) of Westfield and the Westfield Washington Advisory Plan Commission have required developers to install sewer and water utilities within their developments for the vast majority of developed sites in the Township for many years. In most cases, the developer installs such infrastructure and then adds this cost to the price of the developed parcel. This means that the cost of such infrastructure is paid by each individual property owner. However, in some cases, based upon the specific request of the developer or owner, the development has been allowed to proceed without utility connections.

The Town's (City's) policy for utility connection shall be that the developer or owner may choose not to connect the proposed development to the municipal utility systems, and thus avoid the immediate cost of said connection. However, *when utility connections are later required, for whatever reason, the system of fees and charges promulgated by the Westfield Town (City) Council shall apply to that utility connection.* In this manner, the cost of installation of utility infrastructure is equitable to all property owners within the service area of the utility, whether the owner decides to connect to the utility systems when the development first occurs, or whether the owner decides to connect at some later date. The Town (City) currently has a method for allocating the cost of utility connections in a manner which is favorable to the property owners.

The Town (City) also reserves the right to consider other options for providing utility services when working with proposed annexation areas. Options which may be considered include, but are not limited to: payment plans, enlargement of payment periods, discounts, Barrett Law funding, bonds, inter-local agreements and BOT agreements.

Municipal Water Utility

The municipal water utility provides potable water service to properties within the service area of the water utility and in many cases outside of the corporate limits of the municipality. The municipal water utility technically provides the service of pumping water from the water source, treating the water to some level, distributing the water into the system of municipal water lines, storing the water for peak demand and fire protection purposes, and maintaining the system, in its entirety. This policy states that the water utility meets the parameters of providing access to water utility service, to a property, when a municipal water distribution line is within the distributive area of a main trunk line or lateral line. When water lines are already developed with respect to a specific property, the water utility is made directly available to that property when a water line is located within 300 lineal feet of the nearest property line of the developed parcel. Water utility service and connection costs are handled in a manner similar to that of the wastewater utility.

In some cases, property owners have not connected their property to the municipal water system and use private water sources (primarily wells) instead. This election is made by the property owner in accordance with the development standards of the property at the time of the original development. The municipal water system also extends beyond the corporate limits of the municipality and service is provided to property in unincorporated areas. The water utility is administered by the Westfield Town (City) Council who is responsible for recommending user charges to the legislative body of the municipality for implementation. The legislative body of the municipality may consider changes to the user charge system to reflect special situations, as well as changes in policy with regard to the type of customer and/or the location (inside or outside of the corporate limits of the municipality).

The policy of providing municipal water service is not to be construed as being "free" in any respect, and these costs are certainly not covered by property taxes. The water utility is supported by a system of user charges which is administered by the Westfield Town (City) Council. In addition, the development policies and standards of the municipality require the developer or owner to pay any capital costs associated with the extension of water distribution facilities into any proposed development. The major capital expenditures covered by the water utility (outside of the service extensions afforded by the developers) are the capital cost of constructing and maintaining water pumping and treatment and storage facilities. These are paid either directly or indirectly through the utility's user charge system. The cost of extending distribution lines is to be borne by the property owner or developer.

Property tax revenues are not a part of the water utility budget. The water utility sets a system of user charges which are generally paid on a monthly basis. Those user charges cover both the capital and operating costs of the water utility. In addition to monthly service charges, the water utility may consider and/or establish a system of fees or other services such as various

connection fees, or supplemental fees for special facilities installed to meet the needs and demands of customers. The water utility is also subject to some regulatory requirements which are administered at the State and Federal level. As such, the system of fees and charges must be adjusted from time to time to remain current with regulatory and other requirements.

Fire Hydrants

Fire hydrants are generally supported by the user charge system of the water utility. As stated with regard to other services, the municipality may seek changes in the system of revenues used to pay for such services; however, at this time the policy of the Town (City) is that the developer of the site – without regard to the nature of the development – is responsible for installing the fire hydrants necessary to protect the proposed development from catastrophic fire.

Municipal Wastewater Utility

The municipal wastewater utility provides access to wastewater collection, treatment and disposal service to all properties within the corporate limits of the municipality. This policy states that the municipality meets the parameters of providing access to municipal wastewater service when the parcel is within the drainage watershed of a major interceptor, trunk or lateral sewer ***which ultimately delivers wastewater to the municipal wastewater treatment plant.*** In cases where sewer laterals are made available to developed parcels, the standard for service is met when a municipal sewer is located within 300 lineal feet of the nearest property line of the parcel.

In some cases, property owners have chosen not to connect their development to the municipal sewer system and use private wastewater disposal facilities (primarily septic tanks), instead. This decision is based purely upon the owner's election and the development standards of the original property development. As noted above, the general policy of the Town (City) is that the developer pays the cost of installing wastewater utility service in accordance with the schedule of fees and charges in effect at that time, and then adds that cost to the price of the developed parcel. In this manner, the property owner ultimately pays for the cost of the wastewater utility connection.

In the case of developers or owners who elect not to pay the cost of wastewater utility connections for whatever reason, it is the policy of the Town (City) of Westfield to respect that decision. However, when those private wastewater facilities become dysfunctional, it is the policy of the Town (City) of Westfield to provide such wastewater utility connections at the capital expense of the owner, and in accordance with the schedule of fees and charges set forth by the Westfield Town (City) Council at the time the work is undertaken. In this manner, the provision of wastewater utility services is equitable to all property owners.

The municipal wastewater system extends beyond the corporate limits of the municipality and municipal wastewater service is provided to property in unincorporated areas. The wastewater utility is also administered by the Westfield Town (City) Council which is responsible for developing and recommending a system of user charges for implementation. These user charges must cover the cost of both capital and operations of the wastewater utility.

The municipality may consider changes to the user charge system to reflect special situations, as well as changes in policy with regard to the type of customer or the location (inside or outside of the corporate limits of the municipality).

The policy of providing municipal wastewater service is also not to be construed as being "free" in any respect, and the costs of such services are certainly not covered by property taxes. The wastewater utility is supported by a system of user charges which is administered by the Westfield Town (City) Council to cover both capital and operating expenses, in cooperation with the municipality. Property tax revenues are not a part of the wastewater utility budget. The development standards of the municipality are such that the capital cost of wastewater utility services are afforded by the developer as part of the development of the property (and that cost is ultimately passed on to property owners). In addition to monthly service charges, the wastewater utility has established a system of fees for other services such as various connection fees, and/or supplemental fees for special facilities installed to meet the needs and demands of various customers. The cost of extending distribution lines is to be borne by the property owner or developer. The wastewater utility is also subject to regulatory requirements which are administered at the State and Federal level. As such, the system of fees and charges must be adjusted from time to time to remain current with regulatory and other requirements.

Wastewater utility services which are within the wastewater service area of the Town (City) of Westfield will be extended to any property desiring wastewater services and charges for the capital and non-capital cost of extending these wastewater services will be paid by the property owner in accordance with the approved schedule of rates and charges of the wastewater utility, and in accordance with approved annexation policies of the Town (City). Currently, private developers install the local collector sewers as part of their development cost and pay access, as well as, capacity fees for the interceptor and treatment plant costs.

E. Parks and Recreation

The Westfield Parks and Recreation services are funded out of the Parks budget with the Town (City) of Westfield. The inventory of facilities include: Quaker Park, Simon Moon Park, Asa Bales Park, Liberty Park, Hadley Park and Freedom Trail. These parks and recreation operations are supported by the Town's (City's) General Fund. The proposed annexation is not anticipated to have an appreciable affect on exiting park facilities and no additional costs for this function are anticipated.

Provisioning of planned service of a non capital nature within one year

The services can be provided for the annexed area with the existing budget.

Provision of planned service of a capital nature within three years

The capital services required for future growth in parks will be accomplished through the annual budgeting process.

F. Clerk-Treasurer

The Clerk-Treasurer of the Town (City) of Westfield is responsible for the maintenance of all town (city) records.

Provisioning of planned service of a non capital nature within one year.
The services can be provided for the annexed area with exiting personnel

Provision of planned service of a capital nature within three years.
The capital services required for this department can be accomplished through the annual budgeting process.

G. Community Development Department

Planning Division

The Planning Division of Community Development is responsible for all of the planning and zoning support for the Advisory Plan Commission and the Board of Zoning Appeals. These responsibilities currently involve all of Washington Township; therefore, no service level increases are expected for this department with respect to the proposed annexation area.

Provisioning of planned service of a non capital nature within one year.
The services can be provided for the annexed area with exiting personnel who already serve the entire Township area.

Provision of planned service of a capital nature within three years.
The capital services required for this department can be accomplished through the annual budgeting process.

Code Enforcement Division

The Code Enforcement Division of Community Development is responsible for all of the code and ordinance enforcement within the Town (City) of Westfield corporate limits. No service level increases are expected for this department with respect to the proposed annexation area.

Provisioning of planned service of a non capital nature within one year.
The services can be provided for the annexed area with exiting personnel who already serve the entire Town (City) area.

Provision of planned service of a capital nature within three years.
The capital services required for this department can be accomplished through the annual budgeting process.

Building Division

The Building Division of Community Development processes building permits throughout all of the Washington Township, Hamilton County area. It conducts inspections on new buildings and unsafe structures. Since this department currently functions throughout the entire Township, no service level increases are expected for this department with respect to the proposed annexation.

Provisioning of planned service of a non capital nature within one year.

The services can be provided for the annexed area with exiting personnel, who already serve the entire Township.

Provision of planned service of a capital nature within three years.

The capital services required for this department can be accomplished through the annual budgeting process.

Financial Summary and Recommendations

The area proposed for annexation has been researched and analyzed in accordance with the terms of the Indiana Code, title 36, Article 4, Chapter 3.

A. Financial Summary

The primary source of revenue for the Town (City) of Westfield is that which is received from property taxes and COIT (County Option Income Tax).

The net assessed valuation of all real property and its improvements within the area proposed for annexation is $6,130,600.

As a result of additional population and road miles, the Town (City) of Westfield also receives revenue from other sources that include Alcohol Gallonage Taxes, Cigarette Tax, Vehicle Excise Tax, MVH road miles tax, and LR& S road mile tax.

Assuming the annexation occurs prior to March 1, 2008; the property within the area proposed for annexation will then be entered into public record and assessed for taxation as an incorporated area.

Revenue received by the Town (City) of Westfield from property assessed on or before March 1, 2008 will not be realized until May and November of 2009. The delay in the collection of property taxes will cause the Town (City) to experience a cost of services from existing budgets due to the required provision of non-capital services in the first year following annexation (2008). To the extent that real costs exceed revenue as a result of this annexation, the Town (City) of Westfield is prepared to use funds from other budgeted line items in order to assure that services required by State Statute are provide to the proposed annexation area.

The following tables show the net assessed valuation that would be achieved through the proposed annexation. This takes into account the exempt properties and the tax abatement applied to all of the other parcels.

With the exception of calendar year 2007, the Town (City) of Westfield will accrue a net addition to budget line items that support the operating costs of the newly annexed area.

Estimated
Net Assessed Valuation Table

		2007	2008	2009	2010	2011
Total AV of Annexed Area		$ 6,130,600	$ 6,130,600	$ 6,130,600	$ 6,130,600	$ 6,130,600
Less AV Agr. (Exempt)		$ (1,519,550)	$ (1,519,550)	$ (1,519,550)	$ (1,519,550)	$ (1,519,550)
Total AV Non-Agriculture		$ 4,611,050	$ 4,611,050	$ 4,611,050	$ 4,611,050	$ 4,611,050
Less Abatement			$ (3,458,287)	$ (2,305,525)	$ (1,152,762)	$ -
Est. AV net of Abatement			$ 1,152,762	$ 2,305,525	$ 3,458,287	$ 4,611,050

Estimated
Revenue and Expense Table

		2007	2008	2009	2010	2011
Revenue Sources						
COIT		$ -	$ 3,723	$ 7,447	$ 11,170	$ 14,894
Property Tax Rev.		$ -	$ 4,899	$ 9,798	$ 14,697	$ 19,596
Other Revenue		$ -	$ 1,745	$ 3,490	$ 5,235	$ 6,980
MVH		$ -	$ 7,492	$ 14,984	$ 22,476	$ 29,968
LRS		$ -	$ 3,655	$ 7,310	$ 10,965	$ 14,620
TOTAL:		**$ -**	**$ 21,515**	**$ 43,029**	**$ 64,544**	**$ 86,059**
Operating Costs		$ 25,000	$ 26,000	$ 27,040	$ 28,122	$ 29,246
Net Realized		$ (25,000)	$ (4,485)	$ 15,989	$ 36,422	$ 56,812

Capital Services for Water

The total estimated cost to provide for water services to the annexed area is $590,000. The anticipated connection fees (assuming the equivalent of three (3) units per acre) associated with the 158 acres of land would be $790,000.

If the 158 acres would build out in 20 years, a conservative estimate, the recovery of connection fees over that time period would provide an income stream of approximately $47,565 annually to support the bond payments on a $590,000 bond issue.

In addition, annual user fees for service would add another $112,465 per year once the area is completely built out.

This evaluation indicates that the Town (City) of Westfield could provide these services to the annexed area.

Capital Services for Wastewater

The total estimated cost to provide for wastewater services to the annexed area is $970,430 the anticipated connection fees (assuming three (3) units per acre) associated with the 158 acres of land would be $2,100,000.

If the 158 acres would build out in 20 years, a conservative estimate, the recovery of connection fees over that time period would provide an income stream of approximately $95,250 annually to support the bond payments on a $970,430 bond issue.

In addition, annual user fees for service would add another $190,900 per year once the area is completely built out.

This evaluation indicates that the Town (City) of Westfield could provide these services to the annexed area.

Recommendation

SR 32 North Annexation is recommended for annexation due to its conformity with the Indiana State Statutes governing annexation by a municipality, as noted below. The effective date of the annexation is expected to be 90 days following its passage and publication as required by law. Pursuant to I.C. 36-4-3-1.5, the area proposed for annexation is at least one-fourth contiguous to the existing corporate limits of the Town (City) of Westfield. Furthermore, this report has established a plan and cost estimate for the provision of municipal services to the area proposed for annexation and outlined provisions for the following, pursuant to IC 36-4-3-13(d).

1. The cost estimates of planned services to be furnished to the area proposed for annexation;

2. The method or methods of financing the planned services;

3. The plan for the organization and extension of planned services;

4. The provision of planned services of a non-capital nature within one (1) year of the effective date of the annexation; and,

5. The provision of planned services of a capital improvement nature within three (3) years of the effective date of the annexation

Legal Description
SR 32 North Annexations

Parcel 1:

Beginning at the southwest corner of Westfield Annexation Ordinance 96-24, thence north along west line of Westfield Annexation Ordinance 96-24 approximately 327 feet to the intersection with Westfield Annexation Ordinance 04-20, thence west along south line of Westfield Annexation Ordinance 04-20 to a point that is 10 feet east of the east boundary of Hamilton Boone RD and 300 feet north of the south line of Section 31 T19N R3E, thence South 00 degrees, 00 minutes, 00 seconds east approximately 300 feet to the south line of Section 31 T19N R3E, point also being the centerline of SR 32, thence continue south 00 degrees, 00 minutes, 00 seconds approximately 20 feet to the south right-of-way line of SR 32, thence east along the south right-of-way line of SR 32 to the west right-of-way of Little Eagle Creek AVE, thence easterly along the south right-of-way line of Little Eagle Creek AVE to the west right-of-way line of Washington ST, thence east to the east right-of-way line of Washington ST, thence north to the south right-of-way line of SR 32, thence east along the south right-of-way line of SR 32 to the intersection of Westfield Annexation Ordinance 05-09, thence north along the boundary of Westfield Annexation Ordinance 05-09 to the north right-of-way of SR 32, thence east along the northern boundary of Westfield Annexation Ordinance 05-09 (also being the north right-of-way line of SR 32) and the northern boundary of Westfield Annexation Ordinance 04-11 to the northeast corner of said Westfield Annexation Ordinance 04-11, thence south 00 degrees, 00 minutes, 00 seconds east approximately 50 feet, thence east to the place of beginning of said point being the southwest corner of Westfield Annexation Ordinance 96-24.

Parcel 2:

Beginning at the northwest corner of Westfield Annexation Ordinance 95-03, thence west along west line of Westfield Annexation Ordinance 95-03 and Westfield Annexation Ordinance 94-13 approximately 686 feet to the southeast corner of Westfield Annexation Ordinance 97-09, thence north along the eastern boundary of said Westfield Annexation Ordinance 97-09 to the northwest corner of a piece of land with instrument number 2005-63509 recorded in the office of the Hamilton County Recorder, point also being the intersection with Westfield Annexation Ordinance 04-20, thence east along the boundary of Westfield Annexation Ordinance 04-20 to the intersection with Westfield Annexation Ordinance 166, thence south approximately 284 feet to the southwest corner of Westfield Annexation Ordinance 166, thence east approximately 70 feet to the northwest corner of Westfield Annexation Ordinance 171, thence south approximately 62 feet to the south right-of-way line of SR 32, thence west along the south right-of-way line of SR 32 approximately 218 feet to the place of beginning.

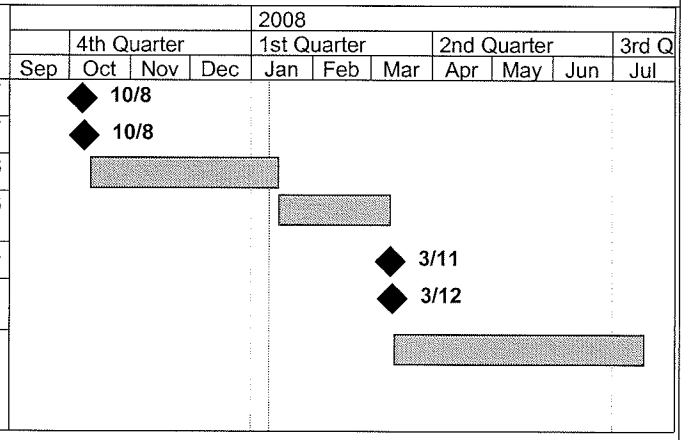
Feasible Timeline for Town (City) of Westfield
SR 32 North Annexations

Day 1	10-08-2007	Council introduces annexation ordinance; Approves resolution adopting "Draft" fiscal plan
Day 1	10-08-2007	Notice of public hearing delivered to local newspaper; Notice of public hearing sent to property owners by certified mail
Day 4 (3 days)	10-12-2007	Notice of public hearing published in local newspaper (one time) published at least 60 days before the public hearing; Also posted at Town (City) Hall.
Day 67 (63 days)	01-14-2008	Council conducts public hearing on annexation; Must be at least 60 days after published notice of hearing. Adopts final fiscal plan for annexation area.
Day 107 (40 days)	03-10-2008	Council approves annexation ordinance no sooner than 30, but before 60 days
Day 108 (1 day)	03-11-2008	Copy of annexation ordinance delivered to local newspaper for publication
Day 109 (1 day)	03-12-2008	Copy of annexation ordinance published in local newspaper one time (commences 90 day remonstrance period)
Day 199 (90 days)	07-16-2008	Annexation becomes effective; Town (City) records ordinance with County Recorder; Town (City) files copy of ordinance with Secretary of State, County Board of Voter Registration, Circuit Court Clerk, and County Auditor

TOWN (CITY) OF WESTFIELD

Feasible Timeline for SR 32 North Annexation

ID	Task Name	Duration	Start	Finish
1	Council Introduction of Annexation Ordinance	1 day	Mon 10/8/07	Mon 10/8/07
2	Notice of Public Hearing To Newspaper & Property Owners	0 days	Mon 10/8/07	Mon 10/8/07
3	Notice Published in Newspaper 60 Days Prior to Public Hearing	67 days	Fri 10/12/07	Mon 1/14/08
4	Council Approval Annexation Ordinance, No Sooner Than 30 Days but Before 60 Days	40 days	Tue 1/15/08	Mon 3/10/08
5	Copy of Annexation Delivered to Newspaper for Publication	1 day	Tue 3/11/08	Tue 3/11/08
6	Copy of Annexation Ord. Published in Newspaper (90 day remonstrance period commences)	1 day	Wed 3/12/08	Wed 3/12/08
7	Annexation Becomes Effective, Records Ordinance with County Recorder; Town Files Copies with Secretary of State, County Board of Voter Registration; Circuit Court Clerk, and County Auditor	90 days	Thu 3/13/08	Wed 7/16/08

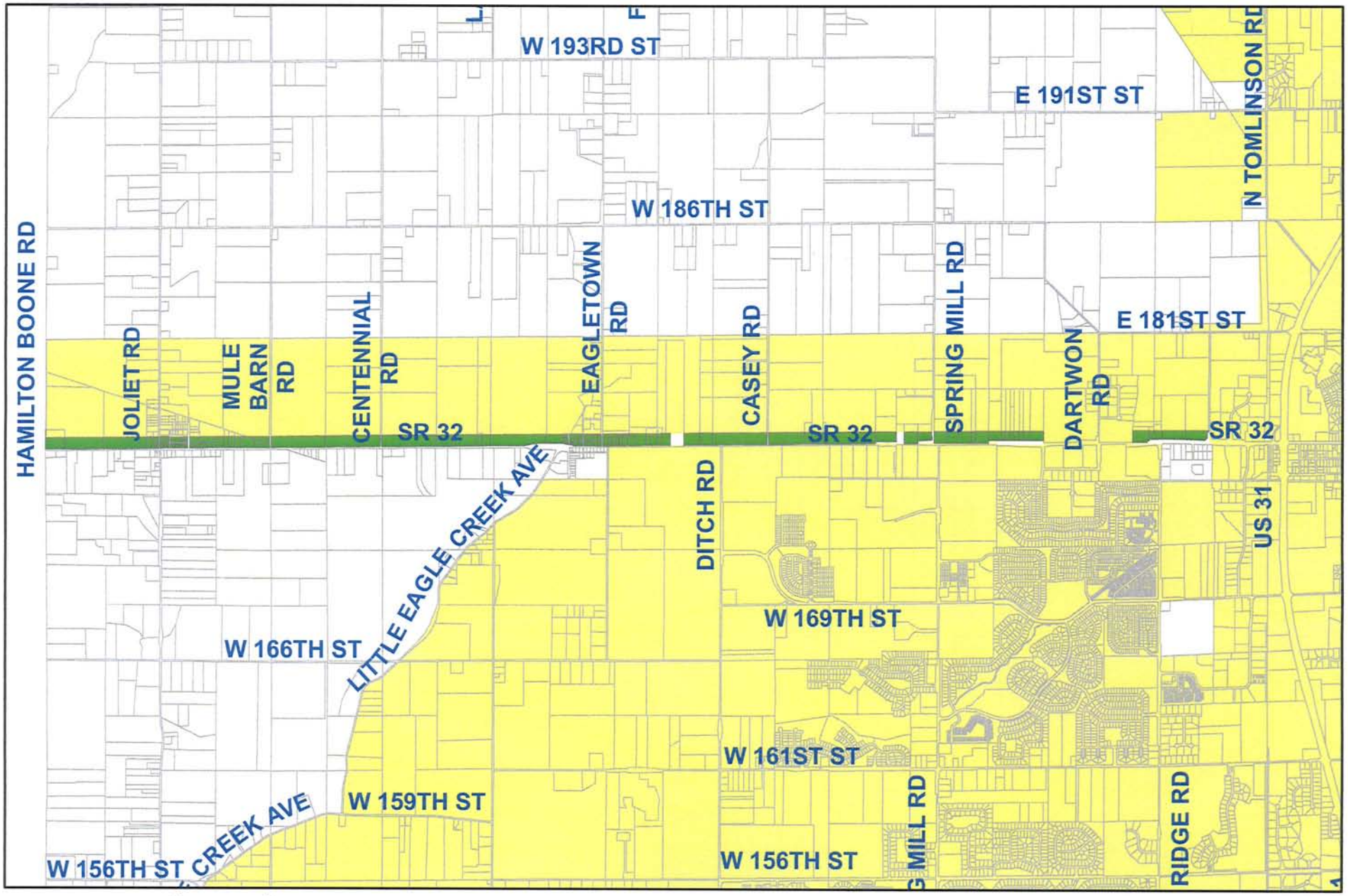


Project: State Route 32 Annexations
Date: Thu 1/10/08

Task		Milestone		External Tasks	
Split		Summary		External Milestone	
Progress		Project Summary		Deadline	

EXHIBIT "A'
Property Identification

Exhibit A



Legend

116 Parcels To Be Annexed - Ordinance 07-22 | Parcels | Westfield Corporate Limits

GIS

FmtPrclNo	Acres
08-05-33-04-01-004.002	0.0156
08-05-33-03-03-002.000	0.0399
08-05-31-04-02-015.000	0.0466
08-05-31-03-01-014.000	0.0559
08-05-31-03-01-012.000	0.0733
08-05-31-04-05-003.000	0.0772
08-05-33-04-01-004.001	0.0872
08-05-33-04-01-001.001	0.1045
08-05-31-04-05-004.000	0.1075
08-05-31-03-01-010.001	0.1121
08-05-31-03-01-013.000	0.1185
08-05-33-03-03-009.000	0.1271
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08-05-31-04-05-007.000	0.1477
08-05-31-04-02-014.000	0.1588
08-05-31-04-05-005.000	0.1590
08-05-31-04-02-011.000	0.1822
08-05-33-03-04-003.000	0.1838
08-05-31-04-02-013.000	0.1878
08-05-33-03-04-001.000	0.2005
08-05-33-03-02-003.000	0.2022
08-05-31-04-06-007.000	0.2026
08-05-33-03-03-008.000	0.2088
08-05-31-04-05-002.000	0.2100
08-05-33-03-03-007.000	0.2121
08-05-33-03-03-006.000	0.2121
08-05-33-03-02-011.000	0.2121
08-05-33-03-02-013.000	0.2121
08-05-33-03-02-012.000	0.2121
08-05-31-04-06-009.000	0.2151
08-05-33-03-02-010.000	0.2159
08-05-33-03-04-002.000	0.2213
08-05-33-03-02-009.000	0.2359
08-05-33-04-01-007.000	0.2385
08-05-33-03-02-005.000	0.2500
08-05-33-03-02-004.000	0.2500
08-05-33-03-02-006.000	0.2500
08-05-33-03-03-005.000	0.2500
08-05-33-03-02-007.000	0.2537
08-05-33-03-02-008.000	0.2780
08-05-31-04-06-008.000	0.2804
08-05-33-04-01-008.001	0.2824
08-05-31-04-02-012.000	0.3272
08-05-31-04-05-009.000	0.3306
08-05-33-04-01-005.000	0.3490
08-05-33-04-01-006.000	0.3491
08-05-31-04-05-006.000	0.3626
08-05-31-03-01-011.000	0.3672
08-05-33-04-01-004.000	0.3680
08-05-33-03-03-003.000	0.4054

FmtPrclNo	Acres
08-05-33-03-03-004.000	0.4057
08-05-31-04-06-012.000	0.4085
08-05-35-00-00-027.001	0.4761
08-05-34-00-00-022.001	0.4813
08-05-35-00-00-025.000	0.4853
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08-05-36-00-00-043.000	0.8753
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08-05-34-00-00-023.002	1.6805
08-05-33-00-00-011.000	1.7422
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08-05-33-00-00-008.000	1.9721
08-05-34-00-00-020.000	2.0499

FmtPrclNo	Acres
08-05-33-00-00-009.001	2.4704
08-05-35-00-00-016.000	2.5576
08-05-36-00-00-042.000	2.7080
08-05-36-00-00-041.000	2.7194
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08-05-31-00-00-018.001	3.0571
08-05-32-00-00-015.000	4.6949
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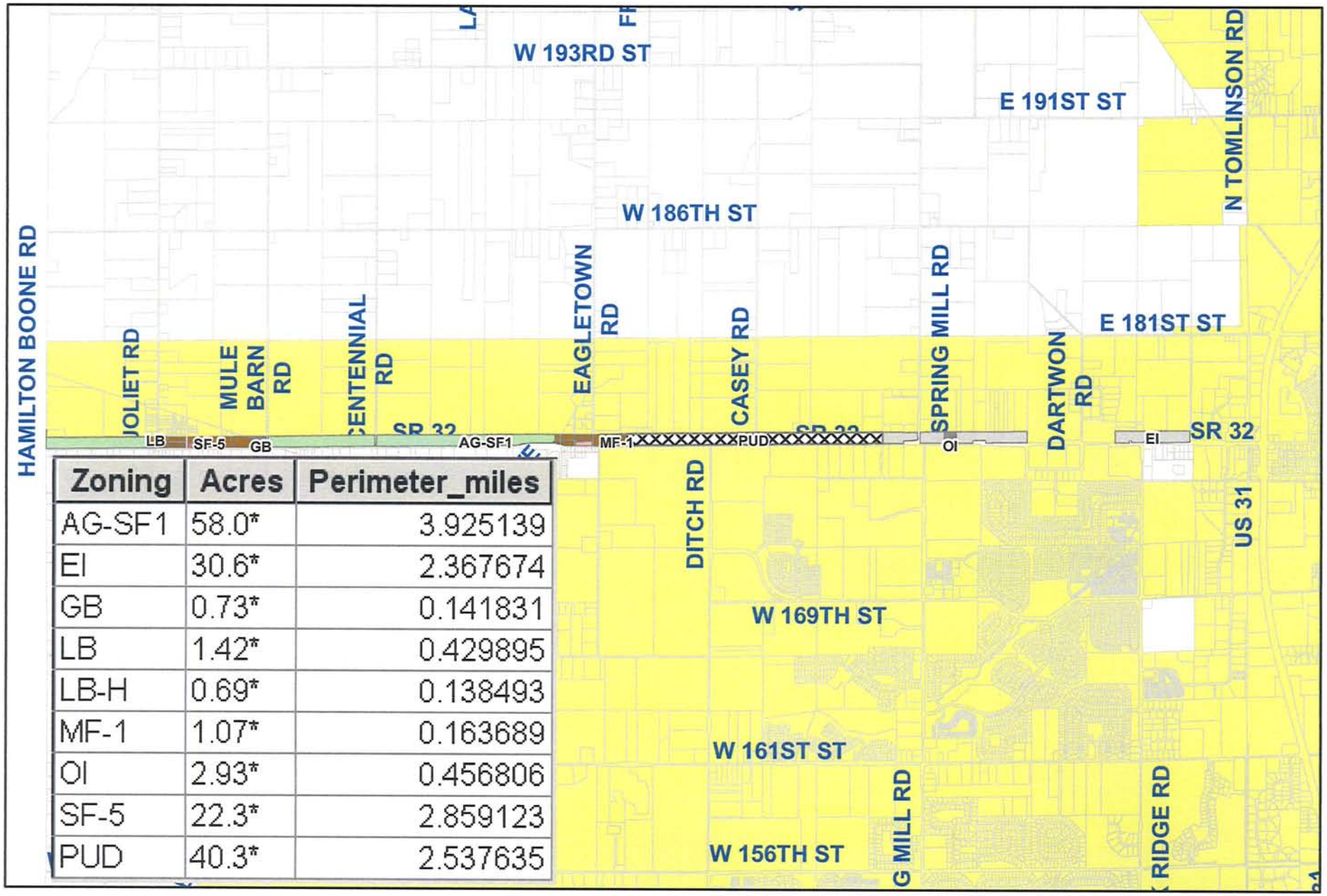
08-05-32-00-00-017.000	8.2977
08-05-34-00-00-024.000	8.4649

EXHIBIT "B"
Zoning Breakdown

Exhibit B - Zoning Breakdown



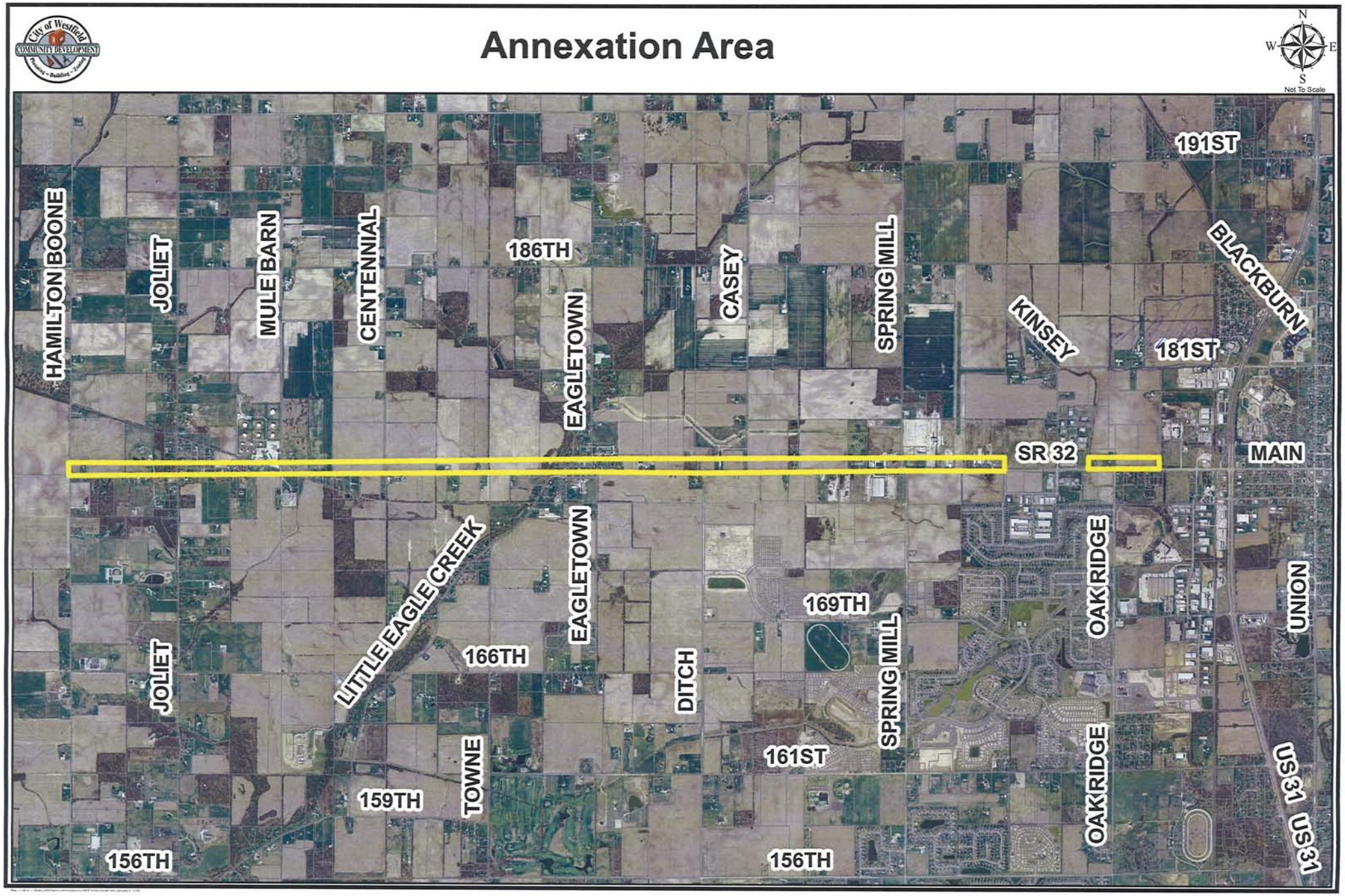
Zoning	Acres	Perimeter_miles
AG-SF1	58.0*	3.925139
EI	30.6*	2.367674
GB	0.73*	0.141831
LB	1.42*	0.429895
LB-H	0.69*	0.138493
MF-1	1.07*	0.163689
OI	2.93*	0.456806
SF-5	22.3*	2.859123
PUD	40.3*	2.537635

Legend

Zoning AG-SF1 EI GB LB LB-H MF-1 OI PUD SF-5 Parcels

Westfield Corporate Limits

GIS

L:\West_GIS\A_Projects\GIS_Processing\Annex04_20_CleanUp_ZoningMap_Revised.mxd

Annexation Area