



# City of North Port

## Road and Drainage District Assessment Study

### Final Report

*August 16, 2010*

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### **BURTON & ASSOCIATES**

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# **BURTON & ASSOCIATES**

*Specialists in Governmental Resources Economics*

August 16, 2010

Ms. Lynn Banish  
Business Manager  
Public Works Department  
1930 West Price Boulevard  
North Port, FL 34286

Re: Road and Drainage District Assessment Study – Final Report

Dear Ms. Banish:

Burton & Associates is pleased to present the City of North Port with this Final Report of the Road and Drainage District Assessment Study that we conducted for the City. We appreciate the fine assistance provided by you and all of the members of City staff who participated in the project. If you have any questions, please do not hesitate to contact Andy Burnham, Kevin Krueger or me at (904) 247-0787.

Very truly yours,



Michael E. Burton  
President

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## I. INTRODUCTION

Burton & Associates has completed a study for the City of North Port to 1) properly allocate public works costs to roads, mowing and drainage to be recovered in the City's Road and Drainage District Assessments, 2) develop an alternative drainage assessment methodology to apportion drainage costs to properties in proportion to benefit received from the City's drainage system, and 3) develop updated road, mowing and drainage assessment rates using the current assessment methodology and prepare an assessment roll of all parcels to be assessed.

The analysis results in a reapportionment of some costs from drainage to mowing and roads and the alternative drainage cost apportionment methodology results in a more fair and equitable apportionment of drainage costs to the various property classes based upon the benefit received from major drainage system components for each property class.

Detailed descriptions of the background, objective, scope, methodology, analysis, results and recommendations of the study are presented in the following sections.

### A. BACKGROUND

The City has a Road and Drainage Assessment District (District) within which it manages and funds all roads and drainage system components. The primary revenue source for the District is a Road and Drainage Assessment program, through which non ad-valorem assessments are collected using the Uniform Method of Collection (included on the annual property tax bill).

The City has contracted with two consulting firms over the past several years to allocate the District costs to roads, drainage and mowing and to develop a cost apportionment methodology to recover the road, mowing and drainage costs from parcels in relation to the benefit received from the service provided. The cost apportionment methodology has been adjusted each of the past two years prior to the current FY 2010 assessments and the City has not been satisfied that the drainage component of the assessment program is as fair and equitable as it should be. Therefore, the City retained Burton & Associates to conduct this study to achieve the objectives stated in the following section.

### B. Objective

The objectives of this study were to:

1. Properly allocate public works costs to roads, mowing and drainage to be recovered in the City's Road, Mowing and Drainage Assessments,

2. Develop an alternative drainage cost apportionment methodology to apportion drainage costs to properties in proportion to benefit received from the City's drainage system,
3. Develop assessment rates based upon the proposed assessment methodology, and
4. Prepare an assessment roll based upon the above referenced cost apportionment to roads, mowing and drainage and the alternative drainage cost apportionment methodology.

### **C. Scope**

The scope of this study was as follows:

#### **1. Primary Scope:**

- a. Evaluate the current assessment methodology for drainage and recommend an alternative methodology that will result in a fairer apportionment of drainage costs to parcels within the City's service area.

#### **2. Additional Scope Items:**

- a. Allocation of District costs to roads, mowing and drainage,
- b. Recalculation of the total road, mowing and drainage assessment rates and resultant assessments for each parcel based upon the newly allocated costs, the current assessment methodology for roads and mowing and the recommended assessment methodology for drainage, and
- c. Production of an assessment roll.

### **D. Study Process**

Burton & Associates met with City staff to ensure that all parties understood and agreed to the scope and objectives of the study. We then prepared a data request for City staff that described all of the data and information that would be required to complete the study.

After receiving all of the requested data, we began development of an alternative cost allocation process to allocate all District costs to roads, mowing and drainage and we began development of an alternative cost apportionment methodology to properly apportion drainage costs to parcels within the District in proportion to benefit received from the drainage system components.

We then met with City staff to review the cost allocation and drainage cost apportionment concepts and methodology. We presented a conceptual flowchart of the cost allocation and

cost apportionment process and made adjustments during the work session as appropriate based upon input from City staff.

Based upon the cost allocation process to allocate costs to roads, mowing and drainage and the drainage cost apportionment methodology agreed upon in the meeting with City staff, we then developed a cost allocation model to allocate all District costs to roads, mowing and drainage. We also developed a cost apportionment model to apportion the drainage costs to parcels based upon the benefit received from the major drainage system components.

During this process, we met with City staff on several occasions in interactive work sessions, with the models up and running, to validate and adjust the allocation criteria and allocation percentages and to properly assign drainage system component benefits to classes of properties.

We then linked the cost allocation and drainage cost apportionment model to an assessment roll model to calculate road, mowing and drainage assessments for all parcels within the District based upon the cost allocation and drainage apportionment results. As a part of the assessment model, we developed a property impact analysis, which showed a comparison of the current assessment and the proposed assessment for various property classes of different sizes. This comparison was presented graphically in bar graphs and the supporting tabular comparisons from which the bar graphs were derived were also shown.

A presentation was made to City Management in which the above described process and results were reviewed. Based upon concurrence of City Management, a similar presentation of the study process and results was made to the City Commission in a workshop meeting. Based upon the consensus of the City Commission during that workshop, we prepared a Technical Memorandum (TM) of the preliminary results of the study, including the preliminary assessment rates. Based upon review of the above referenced TM, updated cost allocations and property records, we calculated the final assessment rates presented herein and the assessment roll delivered to the City electronically under separate cover.

## II. DESCRIPTION OF ROAD AND DRAINAGE DISTRICT SERVICES

The services provided by the City through the Road and Drainage District are described in this section.

### A. **Base Administrative Services**

Base administrative services are classified as those core support functions that are spread across all services provided by the Road and Drainage District. These include rights-of-way inspections, infrastructure evaluations of roads and drainage systems, development plan review, contract administration, system support services, and rights-of-way permit processing. These functions are integral to the daily support and operations of the Road and Drainage District and as such it is determined that the benefit to all parcels from Base Administrative services is proportional to each parcel's benefit from base road and/or base drainage services.

### B. **ROAD SERVICES**

Base Road Services - Base Road services are performed on all arterial and collector roads. Services include the repair of potholes and street areas up to 100 feet by 200 feet and the rehabilitation of roads based on priorities and criteria as determined by the Department's Road Pavement Management Committee, landscape maintenance and the maintenance of bridges and sidewalk maintenance and debris removal. It was determined that there is a benefit conferred upon all parcels from Base Road services.

Enhanced Road Services - Enhanced Road services are performed on all local roads. Services include the repair of potholes and street areas up to 100 feet by 200 feet and the rehabilitation of roads based on priorities and criteria as outlined by the Department's Pavement Management Committee. Work is performed by Department staff and also through contracted services. It was determined that there is a benefit conferred upon some, but not all parcels from Enhanced Road services.

### C. **Rights-of-Way Mowing Services**

This service includes mowing of rights-of-way on unimproved properties by Department staff and service contract within the City. The Department maintains a proactive schedule of all rights-of-way mowing.



## **D. Drainage Services**

Benefit to parcels received from the drainage system and related services is a function of system components from which the parcels receive benefit. The drainage system components and services are as follows:

Primary Drainage (Drainage I) – the major ditches that receive rainwater from secondary drainage system components and convey the rainwater out of the District to receiving waters.

Secondary Drainage (Drainage II) – the retention ditches and other drainage facilities that receive rainwater from the tertiary drainage system components and convey the rainwater to primary drainage system components.

Tertiary Drainage (Drainage III) – the drainage swales and other drainage facilities that collect rainwater in developed neighborhoods where it first falls and convey the rainwater to secondary drainage system components.

These drainage system components are graphically depicted in Figure 1 on the following pages.

Figure 1

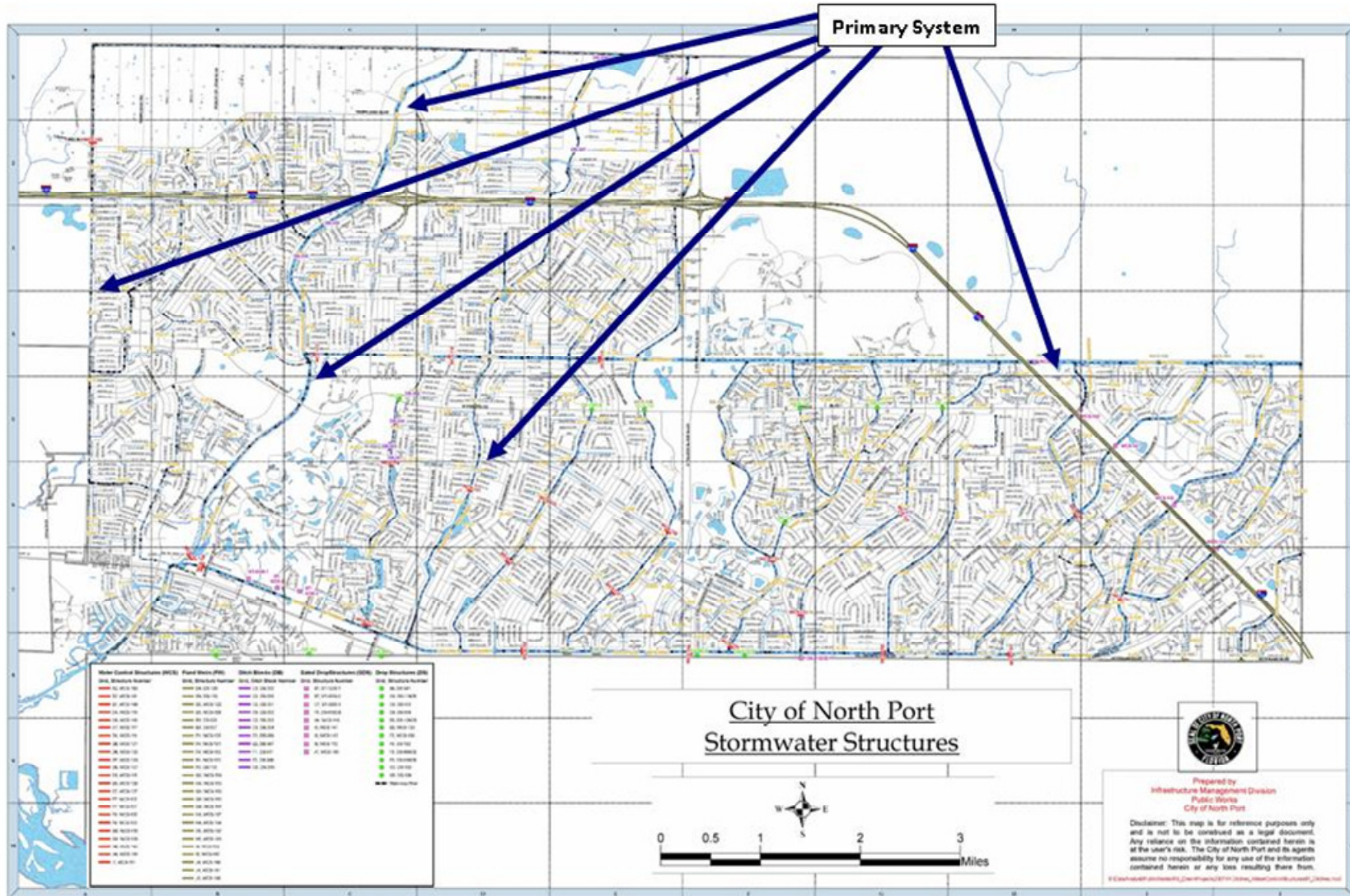
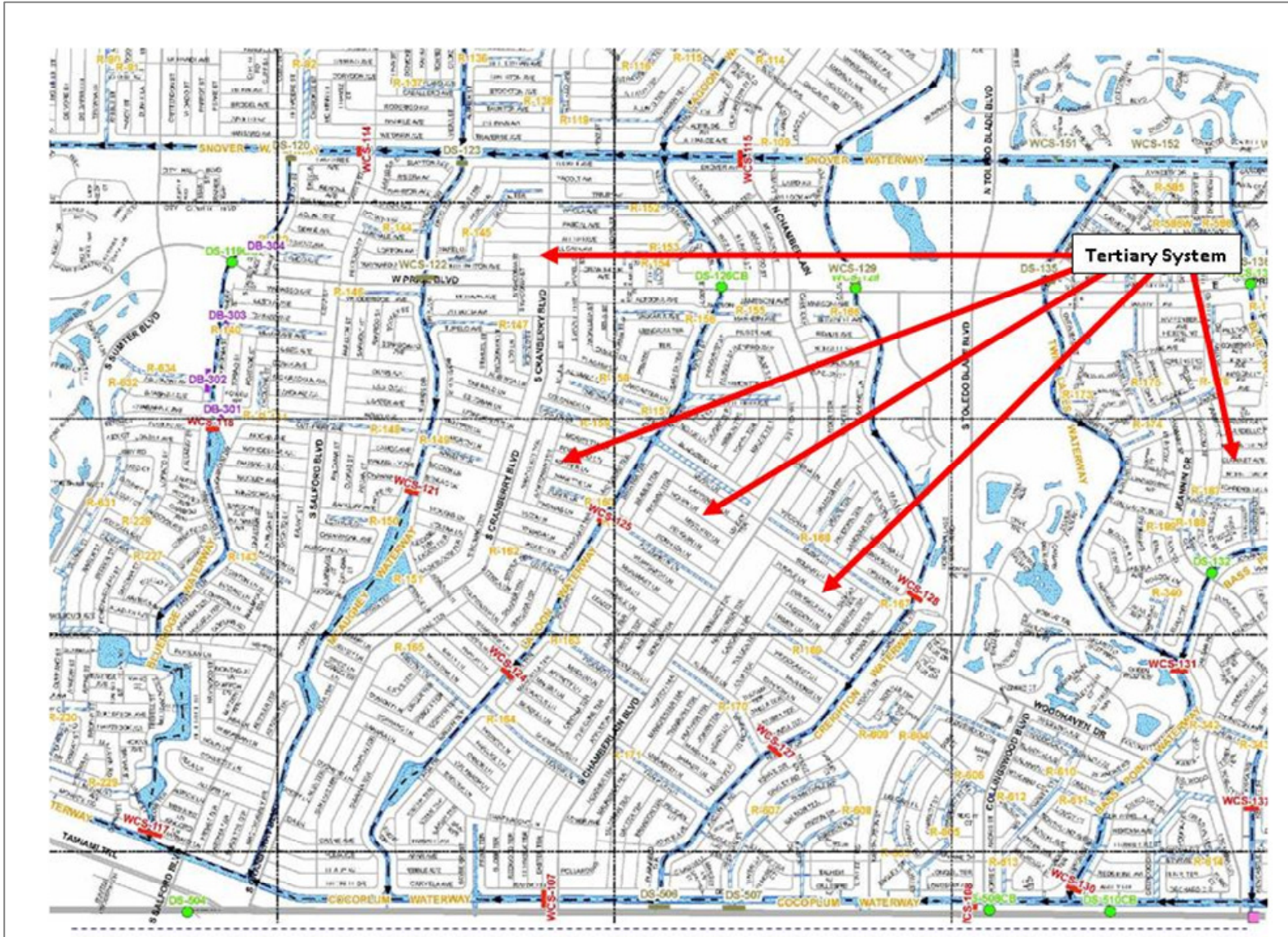








Figure 1 (Cont'd)



### III. ANALYSIS

The analyses conducted during the study are presented in the following subsections.

#### A. Methodology Revisions

Below are the primary revisions which were made to the methodology this fiscal year and which are included in this report.

- Allocations between budget components were revised.
- After reallocation of costs to roads, mowing and drainage, the road and mowing assessment methodology was not changed.
- The drainage methodology was changed to reflect assignment of benefit relative to the primary, secondary and tertiary system components described in the prior section of this report.
- Exemptions – all parcels with governmental codes were considered to be exempt from the Road and Drainage Assessments on the basis of recent court precedent and were not included in the apportionment of costs for FY 2010-2011.
- A method for calculating pond credits is proposed as is a method for addressing claims for credits for wetlands.

#### B. Finding of Special Benefit

The following conclusions support a finding that the road and drainage services provided by the Department confer a special benefit upon the assessed parcels.

- Benefit is conferred by the provision of road, drainage and mowing management services and the availability and use of facilities or improvements by owners and occupants of such property to properly and safely detain, retain, convey or treat drainage discharged from such property
- Benefit is conferred by stabilization of, and/or the increase in property values
- Benefit is conferred in the form of increased safety, better access to property and improved appearance
- Benefit is conferred by rendering property more adaptable to current or reasonably foreseeable new and higher use
- Benefit is conferred by alleviation of the burdens caused by road and drainage runoff and accumulation attendant with the present or projected use of property, and

- Benefit is conferred by fostering the enhancement of environmentally responsible use and enjoyment of the natural resources within the City.

From this analysis, it is concluded that the provision of road and drainage services, such as those provided by the City of North Port, enhances and strengthens the relationship of such services to the use and enjoyment of the parcels of property in the area and, ultimately, the property values within the area. It is further concluded that the value of the special benefit conferred exceeds the assessment in all cases.

### **C. Allocation of District Costs**

The FY 2011 Road and Drainage District Budget was used as the basis for allocating District costs to roads, mowing and drainage. A cost allocation model was developed and used to allocate costs at the detailed line item level to roads, mowing and drainage and further within drainage to the primary system, the secondary system and the tertiary system. During several interactive work sessions with City staff, we reviewed, and adjusted as appropriate, the cost allocation model. During these work sessions the allocation of costs was determined in consultation with City staff based upon appropriate allocation criteria for each line item of cost. The cost of operations personnel was based upon percentage of time devoted to activities associated with the above referenced primary allocation cost pools. Other costs were allocated based upon City staff's judgment as to the percentage benefit derived by the above referenced cost pools and administrative and general costs that were not able to be specifically allocated were allocated based upon the weighted average of other specifically allocable costs.

Costs allocated to Roads were further allocated to Base Roads and Enhanced Roads based upon the allocation percentages reflected in the FY 2010 Road and Drainage Assessment Roll, as adjusted by City staff where appropriate.

The drainage system components referenced in the prior section are a key element in the proposed drainage assessment methodology as they provide for a more detailed cost allocation and assignment of benefit than in the current allocation methodology. The allocation of drainage costs to the above referenced system components was accomplished by direct assignment or allocation of line item costs where possible based upon how personnel and other resources are deployed. Where direct assignment or allocation based upon a specific criterion was not possible, costs were allocated based upon the weighted average allocation of other related costs that were able to be specifically allocated.

The cost allocation results were then applied to the FY 2011 revenue requirement, which was less than the preliminary FY 2011 budget used as the basis for the cost allocations, and is equal to the revenue requirement of the FY 2010 Road and Drainage Assessments.

#### **D. Apportionment Methodology**

Each assessed parcel must receive a special benefit that equals or exceeds the amount of the special assessment actually imposed on the parcel. For the base administrative component, each parcel will receive a benefit proportionally equal to the benefit received from base roads services and/or primary drainage services.

For the road components of the apportionment methodology each parcel will benefit in varying degrees depending upon each parcel's property use category and the number of lots, acreage, number of dwelling units, amount of building area and number of trips generated by the property use. For the right-of-way mowing component, each unimproved parcel will benefit equally from the service and therefore each unimproved parcel is assigned one (1) unit. For the drainage components of the apportionment methodology each parcel will benefit in varying degrees depending upon each parcel's property use category, acreage, or number of dwelling units.

##### **1. Road Apportionment Methodology**

For road maintenance services, an apportionment methodology that uses trip generation rates by property uses and building improvement sizes (or equivalent) to allocate benefits is typical. An analysis of the number of trips to be generated by each property use is based on the trip generation information contained in the August 2007 Government Services Group (GSG) report which is based upon the Institute of Transportation Engineers (ITE) manual (7th edition).

Calculation of Road Equivalent Residential Units (ERUs) - The average trip generation per day for single family residential uses is 9.57 trips per day per dwelling unit. The Road Apportionment Methodology apportions the road maintenance service costs using an equivalent residential unit (ERU) based on the average number of trips generated by the property each day compared to the average number of trips generated by a single family dwelling unit per day. Table 1 on the following page shows the ERUs that were the basis for apportioning the base and enhanced road costs to each benefited parcel of property. It is important to note that this table was derived from a table that was last updated in August 2007 in the above referenced GSG report. Since that time, the Sarasota County Property Appraiser has added, removed, or discontinued use of certain DOR Codes. In instances where



a code has changed since August 2007, the ERU value was imputed in the table below based upon similar use descriptions as provided by the Sarasota County Property Appraiser's office.

**Table 1 - Road Component ERUs**

<u>DOR Code</u>	<u>Property Use Description</u>	<u>Road ERU</u>
0000	RESIDENTIAL - VACANT	1.00
0001	RES NEW CONSTRUCT COMMENCED BUT NOT YET ASSESSED	1.00
0004	VACANT CONDO LOT IN CONDO PROJECT	0.45
0010	VACANT MULTI-FAMILY	0.45
0100	RESIDENTIAL - SINGLE FAMILY	1.00
0101	SFR ATTACHED END UNIT, 1 COMMON WALL	1.00
0102	SFR ATTACHED INTERIOR UNIT 2 OR MORE COMMON WALLS	1.00
010X	RESIDENTIAL - SINGLE FAMILY-MIXED IMPROVEMENTS	1.00
0110	RESIDENTIAL - SINGLE FAMILY CONTAINING APARTMENT	1.00
0200	RESIDENTIAL - MOBILE HOME	0.50
0320	RESIDENTIAL MULTI FAMILY 20 - 49 UNITS	0.45
0390	RESIDENTIAL MULTI FAMILY-100 OR MORE UNITS	0.45
0403	CONDOMINIUM - LOW RISE 2-3 STORIES	0.07
081X	MULTI-FAMILY < 10 UNITS SFRD-MIX	0.44
0820	MULTI FAMILY/LESS THAN 10 UNITS/DUPLEX	0.44
089X	MULTI-FAMILY APTS 5-9 UNITS-MIX	0.44
1000	COMMERCIAL - VACANT	0.17
1004	VACANT COMMERCIAL/INDUSTRIAL CONDO LAND	0.17
1100	COMMERCIAL - STORES-ONE STORY	4.25
1104	RETAIL CONDO UNIT	4.25
1110	COMM'L-STRIP STORES-ONE STORY/LESS THAN 10,000 SF	4.25
111X	COMM'L-STRIP STORES-ONE STORY/LESS THAN 10,000 SF	4.25
1120	COMM'L-STRIP STORES-ONE STORY/=>10,000 AND <30,000	4.25
112X	COMM'L-STRIP STORES-1 STORY/=>10,000 AND <30,000 S	4.25
1140	COMMERCIAL-STORES-1/STORY/ CONVENIENCE-WITH GAS	17.61
1300	COMMERCIAL - DEPARTMENT STORE/FREESTANDING	5.92
1600	COMM'L-COMMUNITY SC/100K-450K SF/SUPRMKT-DEPT STR	5.92
1620	COMM'L-COMMUNITY NEIGHBORHOOD CTRS/30K-100K SF	4.49
164X	COMM'L-COMMUNITY MULTI STY STRIP STORES/<10,000 SF	4.49
1700	COMM'L/OFFICE BLDG-1 STY/SINGLE TENANT <10,000 SF	1.15
170X	COMM'L/OFFICE BLDG-1 STY/SINGLE TENANT <10,000 SF	1.15
1720	COMM'L/OFFICE BLD-1 STY/MULTI TENANT <10,000 SF	1.15
172X	COMM'L/OFFICE BLD-1 STY/MULTI TENANT <10,000 SF -	1.15
1730	COMM'L/OFFICE BLD-1 STY/MULTI TENANT =>10,000 SF	1.15



1800	COMM'L-OFFICE BLDG/MULTI STY-SINGLE TENANT <10,000	1.15
1804	OFFICE CONDO UNIT	1.15
181X	COMM'L-OFC BLDG/MULTI STY-MULTI TENANT <10,000 SF	1.15
1830	COMM'L-OFC BLDG/MULTI STY-MULTI TENANT=>10,000 SF	1.15
183X	COMM'L-OFC BLDG/MULTI STY-MULTI TENANT=>10,000 SF-	1.15
1904	MEDICAL OFFICE CONDO UNIT	1.15
1910	COMMERCIAL-MEDICAL PROF BLDS/1 STY-SINGLE TENANT <	1.15
1920	COMMERCIAL-MEDICAL PROF BLDS/1 STY-MULTI TENANT <1	1.15
192X	COMML-MED PROF BLDS/1 STY-MULTI TENANT <10,000 SF-	1.15
1930	COMM'L-MED PROF BLDS/1 STY-SINGLE/MULTI TENANT =>1	1.15
1950	MEDICAL, VETERINARY-RELATED	1.15
2100	COMMERCIAL - RESTAURANTS/FULL SERVICE	9.40
2210	COMM'L/RESTAURANTS/FAST FOOD W/DRIVE-THRU WINDOW	51.84
2220	COMML/RESTAURANTS-FAST FOOD WITHOUT DRIVE THRU WIN	51.84
2300	COMML-FINANCIAL INSTS(BANKS, S&L/MTG CO, CREDIT SE	16.35
2620	COMMERCIAL-SELF SERVICE GASOLINE/NO CONV.STORE	17.61
2640	COMMERCIAL-SERVICE STATION/CAR WASH-SELF SERVICE	17.61
2710	COMMERCIAL-AUTO SALES (USED)	3.92
2720	COMM'L-AUTO REPAIR/SERV & BODY SHPS/COMMERCIAL GAR	0.31
272X	COMM'L-AUTO REPAIR/SERV & BODY SHPS/COMMERCIAL GAR	0.31
2816	SHOPPING CENTER PARKING	0.00
2821	FULL SERVICE RESTAURANT PARKING	0.00
2835	TOURIST ATTRACTION PARKING	0.00
2838	GOLF COURSE/DRIVING RANGE EXTENDEDUSE	0.53
3500	COMMERCIAL-TOURIST ATTRACTIONS/PERMANENT EXHIBITS,	0.48
3820	COMMERCIAL-GOLF COURSES/SEMI-PRIVATE	0.53
382X	GOLF COURSES, SEMI PRIVATE, MIXED USE	0.53
391X	COMMERCIAL-HOTELS/MOTELS/LODGING(1-40 UNITS) - MIX	0.85
4000	INDUSTRIAL - VACANT LAND	0.09
4100	INDUSTRIAL - MANUFACTURING/LIGHT	0.73
4200	INDUSTRIAL - HEAVY	0.09
4300	INDUSTRIAL - LUMBER YARD	0.52
4800	INDUSTRIAL - WAREHOUSE	0.52
4804	INDUSTRIAL CONDO UNIT	0.52
480X	INDUSTRIAL - WAREHOUSE - MIXED USE	0.52
4810	INDUSTRIAL-WAREHOUSE AND SALES MIXED USE	0.52
481X	INDUSTRIAL-WAREHOUSE AND SALES MIXED USE - MIXED	0.52
4820	INDUSTRIAL-WAREHOUSE AND OFFICE MIXED USE	0.52
4860	INDUSTRIAL-WAREHOUSE - MINI-STORAGE	0.13
4870	INDUSTRIAL-WAREHOUSE/FLEX SPACE/OVERHEAD DOOR FRON	0.52
4880	IND'L-WAREHOUSE/FLEX SPACE/OFFICE FRONT	0.52
4900	IND'L-OPEN STORAGE/MATERIALS/EQUIPMENT/BLDG SUPPLI	0.52

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490X	IND'L-OPEN STRG/MATERIALS/EQUIP/BLDG SUPPLIES/FUEL	0.52
4910	INDUSTRIAL-OPEN JUNK YEAR OR RECYCLING (NOT AUTO)	0.52
6200	AGRICULTURAL - GRAZING LAND SOIL CAPABILITY CLASS	1.00
6900	AGRICULTURAL-ORNAMENTALS	0.00
6930	AGRICULTURAL-ORNAMENTALS/HORSE BREEDING	1.00
7000	INSTITUTIONAL- VACANT INSTITUTIONAL	0.02
7100	INSTITUTIONAL - CHURCHES	3.83
7200	INSTITUTIONAL - SCHOOL (PRIVATE)	1.25
7400	INSTITUTIONAL-HOME FOR THE AGED/ASSISTED LIVING/AC	0.02
740X	INSTITUTIONAL/HOME FOR THE AGED/ACLF/ASSISTED CARE	0.02
7500	INSTITUTIONAL-ORPHANAGES/NON-PROFIT/CHARITABLE SER	0.02
7600	INSTITUTIONAL - MORTUARY	0.02
7700	SERVICE CLUB	0.17
7720	COMMUNITY CENTER	0.17
7750	UNION HALL, OTHER	0.17
7800	INSTITUTIONAL - NURSING HOMES/CCRC/SANITARIUMS	0.02
8200	GOVERNMENTAL - FOREST	1.00
8210	GOVERNMENTAL - PARKS	1.00
8220	GOVERNMENTAL - RECREATIONAL AREA	1.00
8300	GOVERNMENTAL - PUBLIC SCHOOL (BOARD OF PUBLIC INST	1.25
8400	GOVERNMENTAL - COLLEGE (PUBLIC)	1.25
8600	GOV'T-CO(OTHER THAN SCHLS/COLEGS/HOSP)INC NON-MUNI	2.61
8700	GOVERNMENTAL - STATE (OTHER THAN MILITARY,FOREST,P	2.61
8800	GOVERNMENTAL - FEDERAL (OTHER THAN MILITARY,FOREST	2.61
8900	GOVERNMENTAL - MUNICIPAL (OTHER THAN PARKS,REC ARE	2.61
9000	MISCELLANEOUS- LEASEHOLD INTEREST (GOV OWNED LEASE	0.00
9100	MISCELLANEOUS- UTILITY - GAS	0.00
9110	MISCELLANEOUS- UTILITY - ELECTRIC	0.00
9120	MISCELLANEOUS- UTILITY - TELEPHONE	0.00
9150	MISCELLANEOUS- UTILITY - WATER AND SEWER	0.00
9300	MISCELLANEOUS- SUBSURFACE RIGHTS	0.00
9400	MISCELLANEOUS- RIGHT-OF-WAY,STREETS,ROADS,IRR CANA	0.00
9500	MISCELLANEOUS- RIVERS AND LAKES	0.00
9600	MISCELLANEOUS- SOLID WASTE	0.00
9620	MISCELLANEOUS- DRAINAGE RESERVOIR	0.00
9900	MISCELLANEOUS- ACREAGE NOT ZONED AGRICULTURAL	1.00

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For both the Base Road Services and the Enhanced Road Services, the apportionment methodology is identical, using trip generation data as previously described. The determination as to whether a parcel benefits from Base Road Services and/or Enhanced Road Services was based upon the assignment of benefit reflected in the FY 2010 Road and Drainage Assessment Roll, adjusted where appropriate by City staff. The ERU calculation was

based upon the previous methodology outlined in the August 2008 GSG report, which is described below:

### **Unimproved Parcels**

- Includes DOR codes 1000, 4000, 7000, 3820, 382X (golf courses)
  - Parcel ERU = (Category ERU)(Acres)

### **Residential Parcels**

- Vacant residential – DOR codes 0000 & 0010P
  - Parcel ERU = (Category ERU)(1)
- Single family residential – DOR codes 0100, 010X, 010Y, 0110, & 0200
  - Parcel ERU = (Category ERU)(# of Dwelling Units)
- Duplexes – DOR code 0820
  - Parcel ERU = (Category ERU)(# of Dwelling Units)
- Residential condos – DOR code 0400 & 0404
  - Parcel ERU = (Category ERU)(1)
- Multi-family other than duplexes – DOR codes 0320, 0390, 039X, & 0820
  - Parcel ERU = (Category ERU)(# of Dwelling Units)

### **Non-Residential Parcels**

- Commercial condos – DOR code 0410, 0411, 0418, 0419, & 0448
  - Parcel ERU = (Category ERU)(Total Complex Living Area Sq. Ft. / 1,000 / # of Parcels in Complex)
- All other commercial
  - Parcel ERU = (Category ERU)(Building Area Sq. Ft. / 1,000)

### **Acreage Parcels**

- Includes DOR codes 5100, 5200, 5700, 5800, 5900, 6000, 6200, 6610, 6700, 6710, 6720, 6800, 6832, 6900, 8200, 8210, 821X, 8220, & 9900
  - Parcel ERU = 1

## **2. Drainage Apportionment Methodology**

The special benefits conferred by the drainage services provided by the City upon all property located within the City include, but are not limited to (1) the enhancement of the availability and the use by the owners and occupants of property, (2) stabilization of or the increase of property values, (3) increased safety and better access to property, (4) improved appearance, (5) rendering property more adaptable to a current or reasonably foreseeable new and higher

use (6) alleviation of the burdens caused by runoff and accumulation attendant with the use of property.

The City is considering the establishment of a stormwater utility program in the future, and such stormwater utility charge may fund all or a portion of the current drainage services provided by the Department. In a stormwater utility program, the amount of runoff generated by a parcel and sent to the stormwater system represents that parcel's proportionate share of the burden of creating and maintaining the stormwater system. The amount of runoff from a parcel is largely determined by the amount of impervious and pervious areas for parcels of property. However, the database necessary to provide a consistent and reliable stormwater apportionment methodology and to impose charges for such services is not currently readily available.

Therefore, the drainage assessments levied by the City until such data is available are based upon a two-step process that first allocates the drainage costs for each of the primary, secondary and tertiary cost pools<sup>1</sup> based upon the allocation of the relative proportion of land area permeability for Residential and Non-Residential Property categories using a weighted average of the allocation to residential and non-residential based upon 1) Net Effective Impervious Factors as determined in the August 2007 GSG report (adjusted based upon updated property data), and 2) the allocation of equivalent drainage units (EDUs) between the Residential and Non-Residential property classes based upon acres<sup>2</sup>. The EDUs for residential and non-residential parcels determined to receive benefit from primary, secondary and tertiary system components respectively were then divided into the respective residential and non-residential cost pools for primary, secondary and tertiary drainage to calculate the residential and non-residential drainage assessment rate per EDU for the primary, secondary and tertiary drainage system components.

## **E. Calculation of Assessments**

The cost allocation process resulted in the allocation of District costs to roads, drainage and mowing. These cost pools were then used to adjust the road and mowing assessments using the current methodology. The current methodology, which is described in a prior section, was used to calculate roads and mowing assessments because the apportionment criteria are considered to be reasonable and the resultant distribution of roads and mowing costs to

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<sup>1</sup> Total drainage costs allocated into these areas is described in Section G. 1

<sup>2</sup> In the case that the acreage of a parcel is less than 1 acre, a minimum of one (1) Equivalent Drainage Unit is assigned because the Department's drainage services are necessitated by the existence of the majority of the parcels of property in aggregate.

property classes is reasonable and is proportional to the benefit received from the subject service provided.

The drainage cost pool, as allocated to primary, secondary and tertiary drainage system components, was used to calculate an assessment rate per EDU for each system component respectively as described in Section VII.D.2. In accomplishing this calculation, property classes were evaluated and assigned the system components from which they receive benefit. For example, most residential properties were assigned primary, secondary and tertiary system benefits because all system components contribute to draining rainwater from the most residential properties. However, some residential properties, in private neighborhoods that provide tertiary system components for their properties, were only assigned primary and secondary system benefits because the tertiary system benefit is not provided by the City's drainage system. Also, properties like golf courses were only assigned primary system benefit because their runoff goes directly into the City's primary system components and they receive no benefit from the City's secondary and tertiary system components.

After all properties were assigned to the appropriate system components relative to benefit received, the cost for each system component, allocated to residential and non-residential as described in Section VII.D.2, was divided by the total residential and non-residential EDU's respectively which were associated with the parcels assigned to receive benefit from that system component in order to derive a residential and non-residential drainage cost per EDU, by property class, for the primary, secondary and tertiary system components.

After the drainage cost per EDU was calculated for the primary, secondary and tertiary system components, the annual assessment for each parcel was calculated by adding the cost per EDU for each system component from which the parcel receives benefit.

A preliminary assessment roll was produced which listed each parcel with its total road, mowing and drainage assessment. A comparative analysis was also prepared which presented a comparison of the proposed road, mowing and drainage assessment to the current road, mowing and drainage assessment for primary classes of properties in different size ranges.

After reviewing and adjusting the cost allocations and updating property data based upon more current data from the Sarasota County Property Appraiser, final assessment rates were calculated (presented in the following section) and a final assessment roll was produced and delivered to the City electronically under separate cover.

## **F. Credits and Adjustments**

There are two areas where credits and adjustments should be considered, ponds and wetlands. Recommendations in these areas are presented in the following sub-sections and

specific process for application, consideration and approval of pond and/or wetland credits are presented in the Appendix to this report.

### **1. Ponds**

If a property owner constructs a pond on their property, some benefit may be derived to the City's drainage system by virtue of the retainage of stormwater that occurs in the pond. The City currently maintains a file of previously requested pond credits for approximately twenty-one (21) parcels. After consultation with City staff it was determined that it will be appropriate to award a credit against the tertiary drainage portion of the road, mowing and drainage assessment for such parcels based upon calculations prepared and maintained by the Stormwater Manager.

To the extent that property owners request credits for on-site ponds in the future, it was determined that it will be appropriate for the Stormwater Manager to evaluate the request following the process developed by City staff and outlined in the Appendix, and if warranted, to award a credit against the drainage portion of the road, mowing and drainage assessment for such parcels.

### **2. Wetlands**

During the study, a question was raised as to whether adjustments or credits should be considered for wetlands. After discussions with City staff we have concluded that wetlands are a natural feature of the land, are not stormwater attenuation improvements constructed by the property owner and are incorporated into the required drainage infrastructure, similar to low lying and higher elevation areas. Therefore, no adjustments or credits are recommended unless the wetlands are jurisdictional wetlands as formally designated by the Florida Department of Environmental Protection (FDEP). City staff indicated that no parcels within the City are currently designated as jurisdictional wetlands. To apply for a wetlands adjustment or credit, a property owner must follow the procedures developed by City staff and outlined in the Appendix.

## IV. RESULTS

The results of the study are in two parts in this section, 1) the cost allocation of District costs to roads, mowing and drainage, and further to the sub-components for each, and 2) the resulting calculation of road, mowing and drainage assessments and a comparison of the impact of the proposed assessments to the current assessments for various property classes and sizes of parcels. These results are presented in the following subsections.

### A. Allocation of District Costs

As stated previously, the FY 2011 Road and Drainage District Budget was used as the basis for allocating District costs to roads, mowing and drainage. However, it is the desire of the City that the revenue requirement for the FY 2011 assessments be revenue neutral, or equal, relative to the revenue requirement of the FY 2010 assessments. Therefore, the cost allocation results were then applied to that revenue neutral FY 2011 revenue requirement, which is less than the preliminary FY 2011 budget (which was used as the basis for the cost allocations) and which is equal to the revenue requirement of the Road and Drainage Assessments in FY 2010. Table 2 below shows the result of the cost allocation, (after adjusting to the revenue neutral revenue requirement) to the assessment rate cost pools which was used as the basis for calculating the assessment rates proposed herein.

**Table 2 – Cost Allocation Results**

Cost Allocation Results

	<u>Roads</u>		<u>Drainage</u>			<u>Mowing</u>	<u>TOTAL</u>	
	\$3,562,567		\$4,905,629			\$2,076,994	\$10,545,190	
Road Admin	Base Roads	Enhanced Roads	Drainage Admin	Primary Drainage I	Secondary Drainage II	Tertiary Drainage III	Mowing	TOTAL
\$321,910	\$1,628,388	\$1,612,269	\$387,652	\$1,991,670	\$661,619	\$1,864,688	\$2,076,994	\$10,545,190

### B. Calculation of Assessment Rates and Assessments

Based upon the cost allocation and benefit assignment for property classes described in the previous sections, an assessment roll was produced which lists each parcel with its total road, mowing and drainage assessment. The assessment rates developed and used in the preparation of the assessment roll are presented in Table 3 below and the assessment roll was delivered to the City in electronic form under separate cover.

**Table 3 – Rates per EDU by Service Component**

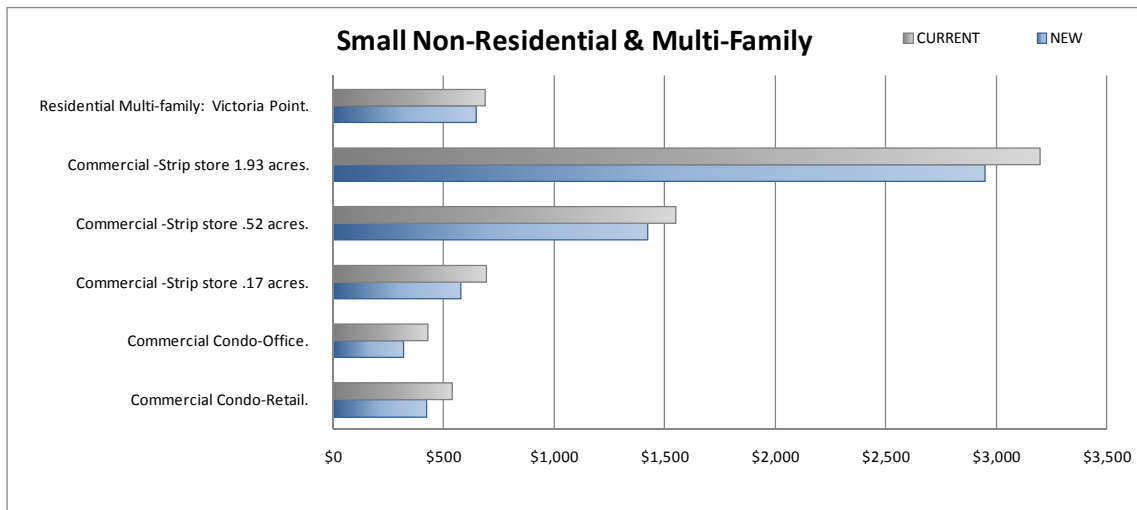
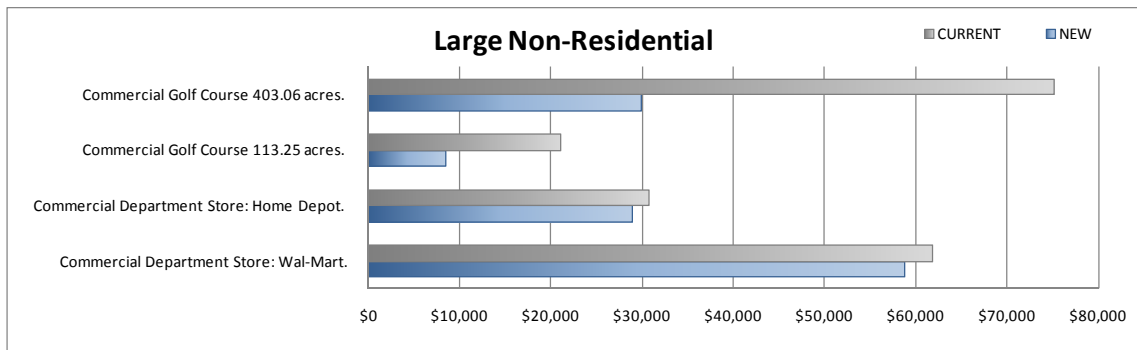
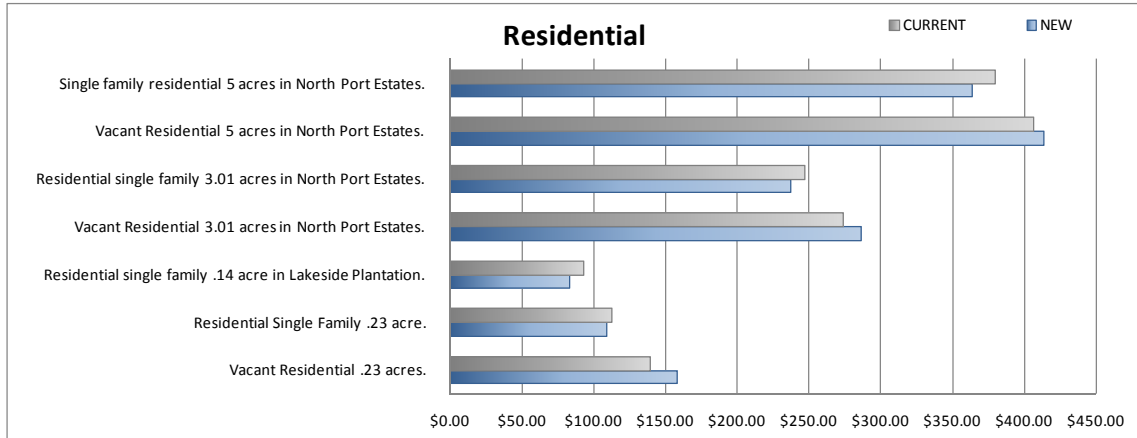
<b>Rates per Unit by Service Component</b>		
Base Administrative Services:		
Component 1	\$3.93	per Road ERU
Component 2	\$5.01	per Drainage Billing Unit
Base Road Services	\$19.88	per Road ERU
Enhanced Road Services	\$21.32	per Road ERU
Right-of-Way Mowing Services	\$47.62	per Parcel
Primary Drainage (I) Services Residential	\$23.92	per Drainage Billing Unit
Primary Drainage (I) Services Non-Residential	\$56.29	per Drainage Billing Unit
Secondary Drainage (II) Services Residential	\$8.76	per Drainage Billing Unit
Secondary Drainage (II) Services Non-Residential	\$25.00	per Drainage Billing Unit
Tertiary Drainage (III) Services Residential	\$26.02	per Drainage Billing Unit
Tertiary Drainage (III) Services Non-Residential	\$68.00	per Drainage Billing Unit

A comparative analysis was also prepared which presented a comparison of the proposed road, mowing and drainage assessment to the current road, mowing and drainage assessment for examples of several classes of properties in different size ranges. Graphical results of this comparative analysis are presented in Table 4 below and the tabular results from which the graphs were derived are presented in Table 5, following Table 4.



**Table 4 – Comparative Property Impact Analysis – Graphical Representation**

Gray bar graphs represent the annual amount of the current assessment and blue bar graphs represent the annual amount of the recommended assessment



**Table 5 – Comparative Property Impact Analysis – Tabular Representation**

Gray highlighted rows are the current annual assessment and blue highlighted rows are the recommended annual assessment

Vacant Residential .23 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0000	0.23	1	1	\$3.40	\$42.30	\$8.00	\$58.70	\$26.50	\$138.90
0000	0.23	1	1	\$3.93	\$41.20	\$5.01	\$58.70	\$49.11	\$157.95
<i>Difference</i>				\$0.53	-\$1.10	-\$2.99	\$0.00	\$22.61	\$19.05

Residential Single Family .23 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0100	0.23	1	1	\$3.40	\$42.30	\$8.00	\$58.70	\$0.00	\$112.40
0100	0.23	1	1	\$3.93	\$41.20	\$5.01	\$58.70	\$0.00	\$108.84
<i>Difference</i>				\$0.53	-\$1.10	-\$2.99	\$0.00	\$0.00	-\$3.56

Residential single family .14 acre in Lakeside Plantation.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0100	0.14	1	1	\$3.40	\$42.30	\$8.00	\$38.50	\$0.00	\$92.20
0100	0.14	1	1	\$3.93	\$41.20	\$5.01	\$32.68	\$0.00	\$82.82
<i>Difference</i>				\$0.53	-\$1.10	-\$2.99	-\$5.82	\$0.00	-\$9.38

Vacant Residential 3.01 acres in North Port Estates.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0000	3.01	1	3.01	\$3.40	\$42.30	\$24.08	\$176.69	\$26.50	\$272.97
0000	3.01	1	3.01	\$3.93	\$41.20	\$15.08	\$176.69	\$49.11	\$286.01
<i>Difference</i>				\$0.53	-\$1.10	-\$9.00	\$0.00	\$22.61	\$13.04

Residential single family 3.01 acres in North Port Estates.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0100	3.01	1	3.01	\$3.40	\$42.30	\$24.08	\$176.69	\$0.00	\$246.47
0100	3.01	1	3.01	\$3.93	\$41.20	\$15.08	\$176.69	\$0.00	\$236.90
<i>Difference</i>				\$0.53	-\$1.10	-\$9.00	\$0.00	\$0.00	-\$9.57

Vacant Residential 5 acres in North Port Estates.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0000	5	1	5	\$3.40	\$42.30	\$40.00	\$293.50	\$26.50	\$405.70
0000	5	1	5	\$3.93	\$41.20	\$25.05	\$293.50	\$49.11	\$412.79
<i>Difference</i>				\$0.53	-\$1.10	-\$14.95	\$0.00	\$22.61	\$7.09

Single family residential 5 acres in North Port Estates.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0100	5	1	5	\$3.40	\$42.30	\$40.00	\$293.50	\$0.00	\$379.20
0100	5	1	5	\$3.93	\$41.20	\$25.05	\$293.50	\$0.00	\$363.68
<i>Difference</i>				\$0.53	-\$1.10	-\$14.95	\$0.00	\$0.00	-\$15.52

Residential Multi-family: Victoria Point.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
0320	5.13	18.9	5.13	\$64.26	\$379.89	\$41.04	\$197.51	\$0.00	\$682.70
0320	5.13	18.9	5.13	\$74.28	\$375.73	\$25.70	\$167.65	\$0.00	\$643.36
<i>Difference</i>				\$10.02	-\$4.16	-\$15.34	-\$29.86	\$0.00	-\$39.34

**Table 5 (Cont'd)** Gray highlighted rows are the current annual assessment and blue highlighted rows are the recommended annual assessment

Commercial Department Store: Wal-Mart.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1300	21.37	1270.28	21.37	\$4,319	\$53,733	\$170.96	\$3,541	\$0.00	\$61,764
1300	21.37	1270.28	21.37	\$4,992	\$52,336	\$107.06	\$1,203	\$0.00	\$58,638
<i>Difference</i>				\$673.25	-\$1,397	-\$63.90	-\$2,338	\$0.00	-\$3,126

Commercial Department Store: Home Depot.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1300	12.69	621.87	12.69	\$2,114	\$26,305	\$101.52	\$2,103	\$0.00	\$30,624
1300	12.69	621.87	12.69	\$2,444	\$25,621	\$63.58	\$714	\$0.00	\$28,843
<i>Difference</i>				\$329.59	-\$684	-\$37.94	-\$1,388	\$0.00	-\$1,781

Commercial Condo-Retail.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1104	0.04	5.9	1	\$20	\$250	\$8.00	\$256	\$0.00	\$534
1104	0.04	5.9	1	\$23.19	\$243.08	\$5.01	\$149	\$0.00	\$421
<i>Difference</i>				\$3.13	-\$6	-\$2.99	-\$107	\$0.00	-\$113.26

Commercial Condo-Office.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1804	0.31	3.55	1	\$12	\$150	\$8.00	\$256	\$0.00	\$426
1804	0.31	3.55	1	\$13.95	\$146.26	\$5.01	\$149	\$0.00	\$315
<i>Difference</i>				\$1.88	-\$4	-\$2.99	-\$107	\$0.00	-\$111.93

Commercial -Strip store .17 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1110	0.17	9.35	1	\$32	\$396	\$8.00	\$256	\$0.00	\$691
1110	0.17	9.35	1	\$36.75	\$385.22	\$5.01	\$149	\$0.00	\$576
<i>Difference</i>				\$4.96	-\$10	-\$2.99	-\$107	\$0.00	-\$115.23

Commercial -Strip store .52 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1110	0.52	28.05	1	\$95	\$1,187	\$8.00	\$256	\$0.00	\$1,546
1110	0.52	28.05	1	\$110.24	\$1,156	\$5.01	\$149	\$0.00	\$1,420
<i>Difference</i>				\$14.87	-\$31	-\$2.99	-\$107	\$0.00	-\$125.89

Commercial -Strip store 1.93 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
1110	1.93	58.68	1.93	\$200	\$2,482	\$15.44	\$494	\$0.00	\$3,192
1110	1.93	58.68	1.93	\$230.61	\$2,418	\$9.67	\$288	\$0.00	\$2,946
<i>Difference</i>				\$31.10	-\$65	-\$5.77	-\$206	\$0.00	-\$245.55

Commercial Golf Course 113.25 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
3820	113.25	60.02	113.25	\$204	\$1,206	\$906.00	\$18,766	\$0.00	\$21,082
3820	113.25	60.02	113.25	\$235.88	\$1,193	\$567.38	\$6,375	\$0.00	\$8,371
<i>Difference</i>				\$31.81	-\$13	-\$338.62	-\$12,391	\$0.00	-\$12,711

Commercial Golf Course 403.06 acres.

DOR	Acreage	Road ERU	Drain EDU	Road Admin	Road	Drain Admin	Drain (I, II, III)	Mowing	Asmt
3820	403.06	213.62	403.06	\$726	\$4,294	\$3,224.48	\$66,787	\$0.00	\$75,032
3820	403.06	213.62	403.06	\$839.53	\$4,247	\$2,019	\$22,688	\$0.00	\$29,794
<i>Difference</i>				\$113.22	-\$47	-\$1,205.15	-\$44,099	\$0.00	-\$45,238

## V. RECOMMENDATIONS

Based upon the analysis and results described in the prior sections of this report, we recommend the following:

1. Adopt the cost allocations to roads, mowing and drainage presented herein
2. Adopt the proposed drainage cost apportionment methodology presented herein
3. Adopt the proposed Road, Mowing and Drainage Assessment Rates presented herein
4. Adopt the proposed Road, Mowing and Drainage Assessment Roll delivered under separate cover
5. Adopt the proposed credit and adjustment policies for ponds and wetlands presented in the Appendix at the end of this report.

## **APPENDIX – WETLAND AND POND CREDIT PROCESSES**

Note: These processes were developed and recommended by City staff.

### **A. Wetland Credit Process**

Wetlands are important components of water resource because they often serve as spawning, nursery and feeding habitats for many species of fish and wildlife. Wetlands often provide important flood storage, nutrient cycling, detrital production, recreational and water quality functions. Not all wetlands or other surface waters provide all of these functions, nor do they provide them to the same extent. A wide array of biological, physical and chemical factors affect the functioning of any wetland.

#### **1. Criteria for Wetland Credit**

For single family platted lots not in a subdivision the property owner must submit to the Road and Drainage District for approval the following:

- Approved Florida Department of Environmental Protection (FDEP) Wetland Jurisdictional Determination (JD) survey clearly showing the limits of the wetland
- Property owner must split the wetland JD area as a separate parcel with a DOR code with the “Wetland” designation. In Sarasota County, the DOR code for wetlands is 9640
- Property identification number, address, owner name and daytime telephone number

#### **2. Amount of Wetland Drainage Credit**

Parcels approved to receive wetland drainage credit will receive an amount equivalent to 100% of the tertiary drainage component of their assessment.

#### **3. Wetlands Credit Application**

In order to receive consideration for a wetland credit, the application on the following page must be completed and submitted to the City.



# City of North Port

## Public Works Department

1930 West Price Boulevard  
North Port, Florida 34286

www.cityofnorthport.com

(941) 240-8050

Fax: (941) 240-8063

### NON-AD VALOREM ASSESSMENT WETLANDS CREDIT APPLICATION

Property Owner(s): \_\_\_\_\_

Property Address: \_\_\_\_\_ Property Account Number: \_\_\_\_\_  
(from tax notice)

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Address: \_\_\_\_\_  
(if different from above)

#### Wetland Credit Process

#### Submission of Required Documents and Information

The property owner(s) of single family platted lots not included in a subdivision shall be required to submit the following documents and information:

1. Attach a copy of approved Florida Department of Environmental Protection Wetland Jurisdictional Determination (JD) survey clearly showing the limits of the wetland.
2. Property owner must split the wetland JD area as a separate parcel with a DOR code "Wetland" designation. In Sarasota County, the DOR code for wetlands is 9640.
3. Property account number, address, owner name and daytime telephone number.

#### Please remit to:

City of North Port  
Department of Public Works  
Attn: Lynn Banish, Business Manager  
1930 W. Price Blvd  
North Port, FL 34286  
Telephone: 941-240-8050

## **B. Pond Credit Process**

When a pond is constructed in a location to receive stormwater run-off from the drainage area, it can serve the following functions:

Water Quality Treatment – Stormwater run-off typically has entrained sediments and pollutants such as nutrients, oils and grease and other floatables which can be settled out or retained in the pond, in lieu of directly discharging into the City’s stormwater conveyance system.

Water Quantity Attenuation – The available free board volume in the pond above the seasonal high water elevation, can serve to attenuate (hold back) the flow of stormwater, so that the adverse effects of simultaneously discharge from all properties during a storm event, can be minimized.

Groundwater Recharge – Water retained in the pond can help recharge the groundwater.

### **1. Criteria for Pond Credit**

For single family platted lots not in a subdivision the property owner must submit to the Road and Drainage District for approval the following:

- Approved pond permit from the City of North Port Building Department
- Property identification number, address, owner name and daytime telephone number

### **2. Amount of Pond Drainage Credit**

The pond drainage tertiary assessment credit will be based on an amount equivalent to the portion of area that drains to the pond (including the pond area) divided by the total parcel area, for example:

Total parcel area = 3.01 acres  
Drainage area to the pond = 1.2 acres  
Pond area at the top of bank = 0.8 acres  
Total parcel drainage tertiary assessment = \$83.02  
Pond drainage tertiary assessment credit = \$55.16  
 $(1.2 \text{ acre} + 0.8 \text{ acres}) / 3.01 \text{ acres} \times \$83.02$

### **3. Pond Credit Application**

In order to receive consideration for a pond credit, the application on the following page must be completed and submitted to the City.



# City of North Port

## Public Works Department

1930 West Price Boulevard  
North Port, Florida 34286

www.cityofnorthport.com

(941) 240-8050

Fax: (941) 240-8063

### NON-AD VALOREM ASSESSMENT POND DRAINAGE TERTIARY ASSESSMENT CREDIT APPLICATION

Property Owner(s): \_\_\_\_\_

Property Address: \_\_\_\_\_ Property Account Number: \_\_\_\_\_  
(from tax notice)

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Address: \_\_\_\_\_  
(if different from above)

### Pond Drainage Assessment Credit Process

#### Submission of Required Documents and Information

The property owner(s) of single family platted lots not included in a subdivision shall be required to submit the following documents and information:

1. Attach copy of approved pond permit from the City of North Port Building Department.
2. Property account number, address, owner(s) name and daytime telephone number.

#### Calculation of Assessment Credit

The pond tertiary drainage assessment credit will be based on an amount equivalent to the portion of area that drains to the pond (including the pond area) divided by the total parcel area.

#### Please remit to:

City of North Port  
Department of Public Works  
Attn: Lynn Banish, Business Manager  
1930 W. Price Blvd  
North Port, FL 34286  
Telephone: 941-240-8050