

# Memorandum



**Date:** May 8, 2007

**To:** Honorable Chairman Bruno A. Barreiro and  
Members, Board of County Commissioners

**From:** George M. Burgess  
County Manager

**Subject:** Study Relating to Incorporations and Annexations

Agenda Item No. 12(B)1

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Pursuant to Resolution R-1051-05 adopted on September 8, 2005 attached please find the County Manager's Report on Incorporation and Annexation. The Report was received by the Infrastructure and Land Use Committee at its July 11, 2006 meeting. Discussion of the report was postponed to a workshop on Incorporation and Annexation. On March 29, 2007, the Government Operations and Environment Committee held an Incorporation/Annexation Workshop. The Committee directed staff to forward this report to the Board of County Commissioners.

  
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Jennifer Glazer-Moon, Director  
Office of Strategic Business Management

cmo10807

# Memorandum

MIAMI-DADE  
COUNTY

**Date:** July 11, 2006

**To:** Honorable Chairman Joe A. Martinez  
and Members, Board of County Commissioners

**From:** George M. Burgess  
County Manager

**Subject:** Report on Incorporation and Annexation

INLUC  
Agenda Item No. 7(B)

As requested pursuant to Resolution R-1051-05, staff has conducted a study analyzing the service delivery impacts of incorporations and annexations authorized since the year 2000. Resolution R-1051-05 also directed that updates be provided regarding the status of boundary dispute resolution negotiations undertaken by the Florida Conflict Resolution Consortium and the financial analysis of proposed municipal incorporations by independent consultant, as well as an inventory of existing and potential enclaves resulting from prior and proposed incorporations and annexations. The attached report presents service delivery impact findings, as well as the requested updates and inventory. This report has been updated since the release of the draft version in April, as noted on the second page of the report.

In my years as a public administrator, I have encountered no governmental process as complex nor public policy issue as emotionally charged as that of municipal incorporation. Allowing citizens to exercise self-determination with regard to their municipal boundaries while ensuring the equitable delivery of both municipal services to Unincorporated Municipal Service Area (UMSA) residents and countywide services to all Miami-Dade residents is one of the most important challenges our County government faces today.

The specific issues addressed by the attached report – impacts of incorporation and annexation to the UMSA budget, boundary disputes, fiscal viability of proposed incorporations, and enclaves – are several among many interconnected issues that have been considered in various forums since the year 2000. Legislation has been adopted during this time period addressing the incorporation and annexation process, regulatory control of facilities of “countywide significance,” and refining the County’s policies relating to debt service obligations and mitigation for annexations that are not revenue neutral. Additional issues for which the adoption or refinement of specific policies has been considered or is now under consideration include the incorporation or annexation of areas lying outside of the County’s Urban Development Boundary, the scheduling of incorporation-related elections, municipal budget authority during transitional periods, opt-out provisions for areas not wishing to incorporate, and the application of and methodology for calculating financial mitigation for donor areas leaving UMSA.

As you know, the last of these issues has been of particular interest in recent months. Most recently, the Mitigation Adjustment Policy Review Task Force established by the Board of County Commissioners held a series of meetings during the months of May and June, and has produced a report to the Boards outlining its findings and recommendations.

I believe that our County government has made great progress over the years in establishing and continually improving policies and procedures relating to incorporation and annexation. However, I believe that we can and must press forward in pursuit of still better means of ordering our boundary adjustment and government service provision and coordination efforts. With this in mind, I would

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and Members, Board of County Commissioners  
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suggest that this report be viewed as a starting point from which our policymakers, County staff, and representatives of our community can jointly refine our incorporation and annexation policies.

While we have included recommendations that will refine our incorporation and annexation policies, I have directed Assistant County Manager Roger Carlton, Office of Strategic Business Management Director Jennifer Glazer-Moon, and Incorporation and Annexation Services staff to carefully reexamine our existing incorporation and annexation policies and processes for additional areas of improvement. We intend to seek your input as we undertake this review.

  
Assistant County Manager

cmo 07306F

# **Report on Incorporation and Annexation**

**Miami-Dade County  
Office Of Strategic Business Management  
Incorporation and Annexation Division**

**June 2006**

## **Note**

This June 2006 *Report on Incorporation and Annexation* differs from the April 2006 version of the report in that it incorporates the following corrections and clarifications:

Pages 4, 9 – Occupational license fees in the Town of Miami Lakes remain at pre-incorporation levels.

Page 5 – The correct FY 2005-06 municipal millage rate for Miami Gardens is 3.6384.

Page 10 – No mini-parks have been transferred to the Town of Miami Lakes. A total of 28.13 acres of park land have been transferred. No basketball courts have been transferred to the Town.

Page 17 – Clarification: municipalities may exceed County code enforcement provisions but may not go below the base line set by the County. The enforcement provided within the municipalities may be based on a modified version of the County Code, with a stricter enforcement regulation.

# Report on Incorporation and Annexation

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## Overview

On September 8, 2005, the Board of County Commissioners adopted Resolution R-1051-05 directing the County Manager to conduct a study relating to incorporations and annexations authorized since the year 2000 and to report findings to the Board. Between 2000 and 2005, five new municipalities have been created: the Town of Miami Lakes, the Village of Palmetto Bay, the City of Miami Gardens, the City of Doral, and the Town of Cutler Bay.<sup>1</sup> During the same period, eight municipalities have expanded their boundaries through annexation: Homestead, Coral Gables, Medley, Florida City, North Miami, South Miami, Hialeah, and Hialeah Gardens. An analysis of the service delivery impacts of these incorporations and annexations makes up the bulk of this report and is presented in the following Section I.

In addition, Resolution R-1051-05 directed that updates be provided to the Board regarding the status of boundary dispute resolution negotiations under taken by the Florida Conflict Resolution Consortium and the financial analysis of proposed municipal incorporations by independent consultant, as well as an inventory of existing and potential enclaves resulting from prior and proposed incorporations and annexations. These updates are presented in the subsequent Sections II, III, and IV of this report.

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<sup>1</sup> Complete transition of municipal services to the Town of Cutler Bay is not expected until after the third quarter of Fiscal Year 2005-06. Therefore, for the purposes of this report, only the municipal services of the municipalities of Miami Lakes, Palmetto Bay, Miami Gardens and Doral will be addressed.

## Section I – Service Delivery Impact Analysis

### *Impacts of Incorporation and Annexation*

During the five-year period beginning in 2000, a total of 58.40 square miles with an approximate population of 185,000 has been transferred from unincorporated municipal service area (UMSA) to municipal jurisdiction through incorporation or annexation – roughly 3% of the land area and 7.8% of the estimated 2004 population of Miami-Dade County.

During the study period, County departments providing direct police, park and recreation, road maintenance, code enforcement, building, planning, and other municipal services to UMSA residents have faced a variety of challenges in maintaining pre-2000 levels of service. Maintaining staffing ratios, response times, and maintenance cycles has required careful planning and the strategic allocation of departmental resources. Furthermore, opportunities to enhance the delivery of municipal services to UMSA residents have been diminished as a result of these trends.

### *Managing the Impacts of Incorporation and Annexation*

For fire rescue, library, police, solid waste management, and water and sewer services, Miami-Dade County's Charter and Code provide varying degrees of protection against the negative impacts of incorporation and annexation. Pursuant to Ordinance 02-26, each new municipality must remain within the County's Fire Rescue District and Library System and must pay for specialized police services in perpetuity, and must contract with the Miami-Dade County Police Department for local patrol services for a minimum of three years. Ordinance 96-30 gives the Department of Solid Waste Management the right to collect garbage in newly incorporated areas and the ability to enter into interlocal agreements for waste disposal with municipalities following boundary changes due to annexation. Ordinance 89-15 grants the Miami-Dade Water and Sewer Department the right to provide water and sewer service to all areas that incorporate or are annexed. Finally, Ordinances 89-81 and 70-84, respectively, authorize the County to continue to collect and receive all electric franchise and utility tax revenues accruing within annexed areas in the same manner as if the annexed areas remained a part of UMSA.

Services not provided for in this manner have been impacted in varying degrees over the past five years, and are expected to continue to be impacted as additional incorporations and annexations are authorized. Impacts have included staff reductions and reorganizations, redistribution of resources, and, in some cases, reduced levels of service.

Police services have experienced the most significant impacts, and are most likely to be significantly impacted by continued loss of UMSA service area – despite the three-year contracting requirement mandated by Ordinance 02-26. Shifting workloads from UMSA to contract and countywide services, combined with requests for enhanced levels of service from contract cities, have placed considerable stress on MDPD's service delivery capacity. Through means such as adding academy classes for sworn personnel and by securing approval for additional staff, MDPD has thus far been able to meet contract cities' requests for service enhancements. Should any of MDPD's contract cities opt to discontinue their relationship with the County, however, more radical means of managing change would have to be adopted.

As with MDPD, the Planning and Zoning and Building Departments have had to plan and budget carefully to accommodate a geographically shrinking UMSA service area. With

countywide responsibilities and/or departmental infrastructure needs (such as the Building Department's permit tracking system) remaining steady, if not increasing, resources must be stretched further and further. Thus far, rapid population growth and development expansion in UMSA have served to alleviate the negative impacts of incorporation and annexation; however, it is unclear how long this trend can persist.

The Park and Recreation, Team Metro, and Public Works Departments also have succeeded thus far in maintaining pre-2000 levels of service to UMSA residents, thanks in part to UMSA growth. Acreage has been purchased for 25 new parks throughout UMSA, while lane miles have been added to UMSA's road inventory. Public Works continues to target reducing the turnaround time for pothole patching repairs from time of report to one business day to provide service enhancements to the residents of UMSA. UMSA population growth has offset Team Metro's loss of resources necessary to maintain Team Metro offices. However, in FY 2005-06 the Department will incorporate a total of twelve Neighborhood Compliance Officers into its enforcement activities to provide more proactive code enforcement in UMSA neighborhoods.

While the level of municipal services to UMSA residents has not been significantly reduced and has in some cases been enhanced, incorporation and annexation have impacted the ability of County departments to deliver services in the same fashion and at the same levels as prior to 2000. Opportunities for far greater enhancement of services almost certainly have been lost due to reconfiguration of UMSA as a result of incorporation and annexation.

#### *Services Provided by Municipalities*

The four municipalities incorporated since 2000 are providing substantially the same municipal services to their residents as those provided by Miami-Dade County prior to incorporation. Each of these municipalities continues to receive from the County, and is required pursuant to the County Code to receive in perpetuity, fire rescue, library, solid waste collection and disposal, water and sewer, and specialized police services.

In addition, the County provides local police patrol and investigative services to each of these municipalities under the Code-mandated minimum three-year contract (the Town of Miami Lakes has completed its initial three-year term and, having determined that County police services are the best and most cost-effective alternative, recently approved a three-year renewal agreement with MDPD). Three of the four municipalities have contracted for enhanced police services in the form of additional officers.

Miami-Dade County continues to provide zoning administration services to the Village of Palmetto Bay but anticipates transitioning this work to the Village in the coming year. Palmetto Bay and Miami Gardens remain in the County's stormwater management district but are expected to opt out during the current fiscal year. All other Planning and Zoning, Building, Public Works, Park and Recreation, and Team Metro code enforcement services have been fully transitioned to the four municipalities. Overall, these municipalities are meeting service needs through a combination of in-house staff and private vendors.

While the services of Miami-Dade Transit are provided countywide, Miami-Dade municipalities in existence prior to the November 2002 adoption of the half-penny transportation surtax are entitled to a share of these funds, which can be used for transit-related public works projects. Municipalities incorporated after adoption of the surtax, Miami Gardens and Doral, have indicated their desire to secure a share of the eighty-percent County distribution of these funds; however, this share is reserved for countywide projects.

### *Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

The services provided by the four new municipalities are largely on a par with the municipal services provided to UMSA residents prior to incorporation. At the broadest level, the principal distinction in service delivery can be viewed as one of government "close to the people" versus government benefiting from economies of scale. However, this distinction may be of little consequence when closely scrutinizing comparable services or when comparing the costs of service provision. For instance, services provided by private vendors on a contractual basis may be little more "close to the people" than those provided directly by employees of a large local government, while such services may also come with a higher price tag and offer fewer benefits of scale.

On the whole, the County has sustained services to UMSA comparable or superior to those provided by the new municipalities to their residents. The Park and Recreation Department, for instance, has maintained its maintenance cycles and level of park programming despite the loss of service area and associated revenue; the breadth and flexibility of these program offerings remains strong due to the support of the existing countywide park and recreation infrastructure. Through its extensive online services, the Building Department provides UMSA residents 24/7 access to services including plan review, scheduling of inspections, and fee payment. Such a level of service would be impossible to maintain without a strong in-house support structure. Similarly, the centralized, in-house Planning and Zoning team provides dedicated, consistent planning and zoning administration services to UMSA residents in a way that no vendor could match. Code enforcement services, meanwhile, vary widely from one municipality to another, pursued according to local priorities, and therefore are particularly difficult to compare directly.

Changes in the geographical composition of UMSA have not precluded Miami-Dade County from providing service enhancements to UMSA residents. Examples include acres purchased for new park lands, the addition of lane miles to the County's road mile inventory to alleviate traffic congestion, and the funding of new Team Metro Neighborhood Compliance Officers to provide more proactive code enforcement in UMSA neighborhoods.

While it is difficult to compare the quality of municipal services across jurisdictions, distinctions in the cost of service provision are more readily measurable. In some cases, the County's fee-schedules for these services have been maintained, while in other cases fees have been raised. Miami Lakes, Palmetto Bay and Doral have adopted the County's fee schedule for occupational licenses, while these fees have been raised by Miami Gardens. Fees for building-related functions have been modified by Miami Lakes; Miami Gardens has maintained the County's fee schedule but added a 15% surcharge. Only Palmetto Bay and Doral have made no changes to the County's fee structure for building-related services. Of the two municipalities already opted out of the County's stormwater utility, Doral has maintained the County's Equivalent Residential Unit (ERU) rate of \$4.00, while Miami Lakes residents are charged \$4.50 per ERU.

Furthermore, *ad valorem* tax rates have increased for the residents of two of the four municipalities, as indicated in the table on the following page. UMSA's millage rate has remained steady at 2.447 since FY 1999-00; as the table illustrates, Palmetto Bay and Doral have maintained this millage rate while rates have increased in Miami Lakes and Miami Gardens.

Municipality (Year Incorporated)	FY 00-01	FY 01-02	FY 02-03	FY 03-04	FY 04-05	FY 05-06
Miami Lakes (2000)		2.447	3.057*	3.057*	2.968	2.825
Palmetto Bay (2002)				2.447	2.447	2.447
Miami Gardens (2003)					3.6484	3.6384
Doral (2003)					2.447	2.447

\* The Town of Miami Lakes millage increased in conjunction with the dissolution of Special Taxing Districts.

## **A. Miami-Dade Police Department (MDPD)**

### *Impacts of Incorporation and Annexation*

Due to the provisions of Chapter 20 of the Miami-Dade County Code, under which new municipalities are required to contract with MDPD for local patrol services for three years and for specialized police services in perpetuity, MDPD's service area has remained essentially unchanged since the year 2000. However, the ability of MDPD to provide local patrol and investigative police services to UMSA residents has been impacted by the incorporation of Miami Lakes, Palmetto Bay, Miami Gardens, and Doral. Though slight, these impacts include a reduced UMSA officer-to-population ratio, increased response times within the UMSA service area, and greater need for the recruitment and training of personnel.

MDPD must staff each newly incorporated municipality in such a manner as to support self-sufficient local police functions. This process begins with a study of the area's police workloads, response times, reported crimes, community needs, and other related issues (Attachment 1). Based on this study, a baseline minimum recommended staffing level is identified to provide dedicated services to the newly incorporated area. As personnel are reallocated from UMSA to serve as dedicated staff to the new municipality, a gradual reduction of personnel available to service the remaining portions of UMSA results. Currently, 370 police officers are dedicated to municipalities and other county agencies that contract local patrol services with MDPD. With incorporation of the Town of Cutler Bay, a minimum of 37 additional police officers will need to be redirected from UMSA to contract service (Attachment 2).

Typically, the baseline staffing level for a new municipality reflects a higher officer-to-population ratio than that of remaining unincorporated area. It is anticipated that as new incorporations are approved, the officer-to-UMSA population ratio will continue to decrease (Attachment 3). Furthermore, response times for emergency calls within the UMSA service area have increased each year since 2001, the year that the Town of Miami Lakes entered into a contract with MDPD (Attachment 4). Only by bolstering UMSA staffing levels is it expected that this trend can be reversed.

Furthermore, three of the four municipalities incorporated after 2000 have requested additional sworn and non-sworn personnel beyond their initially contracted complement (Attachment 5). Provision of this personnel and associated logistical support – police cars and other equipment – incurs additional workloads for the staff charged with facilitating these enhancements.

Annexation has had a lesser impact on the ability of MDPD to provide police services to UMSA. While most of the current annexation applications are expected to have no impact on UMSA staffing, several proposals are significant in terms of geography and police workload and would, if approved, allow for the reassignment of MDPD personnel to other UMSA regions. Potential annexations by contract municipalities, such as that proposed by the City of Doral, might also lead to a reallocation of UMSA personnel to the municipality to meet the new workload needs.

### *Managing the Impacts of Incorporation and Annexation*

Due to the complex nature of incorporation and annexation, MDPD has had to dedicate staff exclusively to handle these issues. A Municipal Services Unit was created to facilitate the incorporation and annexation process as well as provide administrative and logistical support to contract municipalities.

Municipal Services Unit notwithstanding, individuals within MDPD's various support bureaus (Planning, Legal, Personnel, etc.) have been tasked exclusively with incorporation and contract municipality issues. As incorporation continues and existing contract municipalities request increased staff and resources, MDPD support staff bear an increasing burden. These costs associated with this increased staffing are supported by the overhead computation in existing contracts.

Regarding personnel reallocated to municipalities, impacts have been largely temporary in nature, with vacated UMSA positions gradually being replenished by way of academy classes, and shortfalls being addressed through the creation of new positions. Though temporary, such impacts are likely to be recurring, and have associated costs that are not currently being fully recovered through the contracting process. For example, in the current fiscal year fewer new recruits will be added to MDPD's existing complement than will be lost to retirement, while at the same time sworn personnel will be assigned to the new Town of Cutler Bay – creating a need for an additional academy class for which funds are not currently budgeted (Attachments 6 and 7).

Finally, as contracts with municipalities extend past the mandatory three year period, municipalities may opt out their contract with MDPD and form their own police department. In instances such as this, MDPD personnel assigned to the municipality would need to be reallocated back to UMSA. Depending on the amount of personnel involved, staffing adjustments to the Department would be achieved through the cancellation of future academy classes until attrition rates dictate that new classes are needed.

#### *Services Provided by Municipalities*

None of the four municipalities incorporated since 2000 directly provide police or sheriff services. As required pursuant to Chapter 20 of the Miami-Dade County Code, new municipalities must contract with MDPD for local patrol services for three years and for specialized police services in perpetuity. Staffing for the police districts is established to support 24 hours/day, seven days/week service in all areas of patrol.

#### *Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

The type of police services provided to the residents of Miami-Dade's new municipalities is comparable to those provided to UMSA residents. However, three of the four municipalities incorporated after 2000 has contracted with MDPD for an enhanced level of service relative to its baseline staffing level, and in some instances, the ratio of sworn officers to population in contracted municipalities is slightly higher than the remaining UMSA police districts.

## **B. Building Department / Department of Planning and Zoning**

### *Impacts of Incorporation and Annexation*

Both the Building and Planning and Zoning Departments' staffing levels have remained steady throughout the study period. This is attributable not necessarily to the absence of impact associated with incorporation and annexation, but in large part to rapid population growth within UMSA.

### *Managing the Impacts of Incorporation and Annexation*

Pursuant to State Statute and the Florida Building Code the permit fees and charges collected by the Building Department are restricted to be used for building related activities such as plan reviews, building inspections, and administration of the Building Code. This restriction is the same for all building departments throughout the State of Florida. For permit applications received subsequent to incorporation yet prior to the date of assumption of services by a new municipality, the Building Department remains responsible for reviewing plans, issuing permits, and conducting associated inspections. In order not to negatively impact the Department's current levels of services to UMSA and the City of West Miami, a percentage of the Building Department's fund balance is reserved to cover the future cost of activities related to permits issued prior to the date of assumption.

### *Services Provided by Municipalities*

Miami-Dade County has transitioned provision of building, planning, and zoning services to each of the new municipalities, with the exception that Department of Planning and Zoning continues to provide zoning administration services to the Village of Palmetto Bay (however, it is anticipated that this work will be transitioned to the Village within the current fiscal year.)

### *Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

UMSA residents continue to have 24/7 web-based access to most Building Department services including payment and scheduling of plan review and field inspections. There are 344 budgeted Building Department positions in the County's Building Department for FY 2005-06, consisting of professionals in diverse fields. Collectively, the Department's Building/Structural, Electrical, Mechanical, and Plumbing Divisions consist of 190 positions, which provide one-on-one plan review and field inspections to the residents of UMSA. The County's ability to conduct building related functions internally provides a rapid service to UMSA because it eliminates the piecemeal functions provided by vendors serving municipalities.

Similarly, the Department of Planning and Zoning provides a professional staff in order to serve the UMSA residents. The Department prepares, evaluates, and maintains the Comprehensive Development Master Plan (CDMP) and unincorporated area plans, conducts collaborative long- and short-range planning programs, and administers the zoning regulations for UMSA. In FY 2005-06 the Department consists of 171 budgeted positions, out of which 124 professionals are dedicated to the divisions of Planning/CDMP and Zoning.

The four municipalities incorporated since 2000 provide building, planning, and zoning services through a combination of city staff and outside vendors or solely through outside vendors, as shown in the table below. While Palmetto Bay and Doral have adopted the County's fee

structure for related services, Miami Lakes has adopted its own fees. Miami Gardens has maintained the County's fee schedule but has added a 15% surcharge to cover the cost of staffing a new department and to build up reserves to pay for the department's capital share of a future City Hall structure.

**Municipal Building / Planning and Zoning Resources and Fee Structure**

<b>Municipality</b>	<b>Staff Positions</b>	<b>Vendor Utilization</b>	<b>Fee Structure</b>
Miami Lakes	Building – 2 Planning and Zoning – 1	Yes – building related functions	Changed
Palmetto Bay	Building – 0 Planning and Zoning – 3	Yes – building and zoning related functions*	Adopted County's fee schedule
Miami Gardens	Building – 9 FT, 6 PT Planning and Zoning – 7 FT, 6 PT	No	Adopted County's fee schedule plus added a 15% surcharge
Doral	Building – 8 Planning and Zoning – 1	No	Adopted County's fee schedule

\* Miami-Dade County provides zoning review services on a contractual basis. This service is expected to be transitioned to the City within current fiscal year.

*Occupational Licenses.* Some of the newly incorporated municipalities have adopted the County's occupational license fee structure, while others have adopted their own fee schedules. Miami Lakes, Palmetto Bay and Doral have not changed occupational licenses fees; Miami Gardens has increased the fees associated with occupational licenses. Miami Gardens has adopted the fee schedule of the City of Miramar in Broward County, which differs significantly from that of Miami-Dade County.

### C. Park and Recreation Department

#### *Impacts of Incorporation and Annexation*

Incorporations and annexations have resulted in an approximate loss of 460 park acres in 24 local parks, which have been deeded to the newly created municipalities. When the local parks were transferred to the new municipalities, all of the related functions being performed in those parks were discontinued by the department.

#### *Managing the Impacts of Incorporation and Annexation*

The loss of local park acreage led to a redeployment of 50 full-time positions in order to support expanded service to UMSA. The following table summarizes the loss of park acreage and full time staff positions associated with the incorporations of the four municipalities that have incorporated since 2000.

<b>Municipality</b>	<b>Number Of Parks</b>	<b>Acres</b>	<b>Staff Positions</b>
Miami Lakes	2*	28.13	18
Palmetto Bay	3	67.48	3
Miami Gardens	16	173.00	26
Doral	3	109.00	3
<b>Total</b>	<b>24</b>	<b>459.54</b>	<b>50</b>

\* In addition to conveying two traditional parks, 89 mini-parks within the Miami Lakes Special Taxing District for landscape maintenance were conveyed to the municipality.

Each of the parks that have been conveyed to new municipalities had a range of improvements or plans associated with them. Through interlocal agreements or direct Board action the funding associated with those improvements was forwarded to the municipalities where appropriate. That funding consisted of QNIP bond proceeds, impact fees and/or other park-related funding sources associated with individual local parks. Forwarding the funding allowed the municipality to complete those improvements or plans that were already identified and promised to the residents of the area. The following describes some of the park facilities that have been conveyed to new municipalities.

<b>Facility Type</b>	<b>Miami Lakes</b>	<b>Palmetto Bay</b>	<b>Miami Gardens</b>	<b>Doral</b>	<b>Total</b>
Baseball Fields	9	8	7	0	24
Basketball Courts	0	4	25	0	33
Picnic Shelters	4	1	8	0	13
Recreation/Field Centers	7	2	11	0	20
Swimming Pools	0	0	4	0	4
Tennis Courts	8	4	16	4	32
Tot Lots	2	2	11	2	17
<b>Total Facilities</b>	<b>34</b>	<b>21</b>	<b>82</b>	<b>6</b>	<b>143</b>

*Services Provided by Municipalities*

Park and Recreation services such as parks maintenance and programming are being provided by all of the new municipalities. Miami Lakes, Palmetto Bay, and Doral are providing those services through a combination of city staff and contracts with outside vendors. Since the beginning of the current fiscal year, Miami Gardens has transitioned all of its parks maintenance and programming functions from outside vendors to city staff.

*Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

Since 2000, the Park and Recreation Department has acquired and/or purchased approximately 791.5 acres for new park land, representing 25 new parks. The acquisition of additional acreage and parks has allowed the Department to establish 52 new full-time positions. Currently, the Department manages 255 parks encompassing 12,372 acres, representing a ratio of 4.76 employees per managed parks. In 2000, the ratio was 4.38 employees per managed parks. Thus, the Department's ratio of employees per managed parks has stayed relatively the same, allowing the Department to maintain the same level of maintenance cycle and the same level of park programming to the remainder of the UMSA residents. The following table shows the new acres acquired since 2000 and the new staff positions that have been added in each respective fiscal year.

Fiscal Year	03/04	04/05	05/06	Total
Acres	179	602	10.5	791.5
Staff	18	9	25	52

It is difficult to measure the impact of the loss of specific parks to UMSA residents. Pursuant to County policy, all parks that are conveyed to municipalities must remain open to UMSA residents with no discrimination in price or access. UMSA residents, therefore, will experience the same park system as residents of the new city. Within the remaining unincorporated area, since the Department has maintained the same level of maintenance cycle and the same level of park programming to the remainder of UMSA parks and recreational facilities, UMSA residents continue to receive the same level of UMSA parks and recreational services as prior to the year 2000. After incorporation, programs are reviewed by the new municipality and a determination is made on their continuation. Additionally, park improvements and expansion are determined by the new municipality. Substantial research would be required to assess whether or not these residents are more or less satisfied with the services and facilities provided.

Since the adoption of the charter that created a metropolitan form of government, the Park and Recreation Department has served two functions: a countywide function and a local function. Countywide parks serve the broader interests of all residents and visitors. They include parks and facilities such as Miami Metrozoo, the beach parks of Haulover and Crandon Parks, greenways, and natural areas and a variety of programs associated with these facilities. Local parks serve more specific area recreational needs and include neighborhood and community parks. Community parks typically offer a range of programs and facilities.

As local parks are conveyed, the Department faces an increasing problem of coordination of recreation programs. With numerous jurisdictions making independent decisions regarding program offerings and facilities, it becomes increasingly difficult to avoid duplication. On the other hand, the Department has the opportunity to expand countywide programming and facilities.

## D. Public Works Department/Department of Environmental Resources Management (DERM)

### *Impacts of Incorporation and Annexation*

Approximately 480 local road miles have been transferred to municipalities since 2000 due to incorporation and annexation. The following table shows the effect of incorporation and annexation in the Department's inventory of local roads and bridges. Since 2000, the Department has lost 12% of its local road miles and 12% of its bridges. All secondary canals and associated canal rights-of-way continue to be owned and maintained by the County.

Municipality	Action/Date	Road Miles	Bridges
<b>Pre-2000 Condition</b>		<b>4,400</b>	<b>149</b>
Coral Gables	Annexed Kings Bay 2003	2.05	0
Doral	Incorporated in 2003; local roads transferred 1/20/05	53.16	2
Florida City	Annexed an area in 2001	3.10	0
Hialeah Gardens	Annexed an area in 2004	2.05	0
Homestead	Annexed an area in 2001	N/A	0
Medley	Annexed an area in 2002 Annexed an area in 2003	2.86	2
Miami Gardens	Incorporated in 2003; local roads transferred 10/1/04	232.06	7
Miami Lakes	Incorporated in 2000 - local roads transferred 6/1/03	55.70	0
Palmetto Bay	Incorporated in 2002; local roads transferred 1/31/05	128.60	7
<b>Total</b>	<b>Transferred local activities</b>	<b>479.58</b>	<b>18</b>
<b>Current Condition</b>		<b>3,920.42 (12%)</b>	<b>131 (12%)</b>

### *Managing the Impacts of Incorporation and Annexation*

Since 2000, Public Works has continued to add lane miles to its road miles inventory. In addition, as areas of UMSA are being developed, there is an increase in the maintenance of the growing road and lane miles inventory. During the FY 2004-05 resource allocation process, the BCC adopted a budget which granted the Department 11 extra positions to improve performance in pothole patching activity from the current two business days to one business day (four positions) and drain cleaning from every 15 years to every eight years (seven positions). The performance improvement goals bring the Department into closer compliance to Federal standards. Currently, the Department is in the process of phasing in the pothole crews approved in the FY 2004-05 budget. Thus, the Department continues to target reducing the

turnaround time for pothole patching repairs from time of report to one business day to provide service enhancements to the residents of UMSA.

*Services Provided by Municipalities*

The four municipalities incorporated since 2000 are providing substantially the same public works services to their residents (with the exception of canal maintenance activities on County owned canals and canal rights-of-way) as those provided by the Department, as depicted below:

*Miami-Dade County.* Maintenance and/or repair of sidewalks, shoulders, guardrails, bridges, storm drains, stormwater stations; obstruction removal; pothole patching; cleaning of storm drains; installation of new drains; cleaning of debris from canals; culvert cleaning; mechanical cleaning of canals; chemical treatment of canals with aquatic herbal application (aquatic weed control); mowing of canal banks.

*Town of Miami Lakes.* Landscape town median swales/property, general engineering, code enforcement, building services (permitting, plans review, and inspections), drainage improvements, special master services (waivers on zoning ordinances), stormwater drainage maintenance, stormwater improvements, disaster recovery, street sweeping, roadway striping.

*Village of Palmetto Bay.* Maintenance of roads, public facilities and parks, beautification projects; coordinator of stormwater services and construction management of capital improvement projects.

*City of Miami Gardens.* Construction and maintenance of streets, sidewalks, signage, entranceway features and fixtures, paving, landscaping and beautification activities.

*City of Doral.* Pothole repair, sign installation, sidewalk repair, drain and inlet survey, ROW mowing/landscaping contractor supervision, proposed construction activity review, weekly road and ROW cleaning (clearance of unsightly debris and discarded materials).

*Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

Notwithstanding the incorporation of the four new municipalities, Public Works is maintaining the same level of service for right-of-ways mowing cycles within UMSA, and maintaining its performance standards of repairing sidewalks, resurfacing or repairing minor potholes in local roads within an average of 2 business days from the time a complaint is received from the public. In fact, Public Works is currently handling twice as many complaints as they were in 2000 when they handled 1,830 complaints. Likely because UMSA residents have more venues available to report road maintenance needs – such as internet access through the County's web page, the 311 Answer Center, and the Department's outreach program through town halls and Community Council meetings – a greater number of complaints are being handled by the Department. Public Works is attending to more demands with equally the same level of resources as they were in 2000.

*Stormwater Management.* Two of the four municipalities that have incorporated since 2000 have been exempted from the County's stormwater utility: Miami Lakes and Doral. The residents of Doral continue to pay \$4.00 per Equivalent Residential Unit (ERU) – the same rate UMSA residents currently pay. The residents of Miami Lakes, however, are charged \$4.50 per ERU. The two municipalities that remain in the County's stormwater utility, Palmetto Bay and Miami

Gardens, are expected to be exempted during the current fiscal year. The County continues to provide roadway drainage services within the municipalities until the municipality is exempted from the County's stormwater utility. The County continues to perform routine canal maintenance on the County-owned secondary canal system and its right-of-way before and after a municipality's exemption from the County's stormwater utility. However, the municipality must enter into an interlocal agreement with the county for the cost sharing of the maintenance of those secondary canals within the city's boundaries.

## **E. Department of Solid Waste Management (DSWM)**

### *Impacts of Incorporation and Annexation*

Due to the provisions of Ordinance 96-30, incorporations and annexations taking place after February, 1996 are serviced by DSWM. However, as a matter of policy, the DSWM is willing, in the case of annexations, to delegate the authority to provide residential waste collection services to municipalities incorporated before 1996, provided that the municipalities have a long-term contractual agreement for disposal services with the Department. Accordingly, the effect of such incorporations and annexations has not negatively affected the DSWM.

### *Managing the Impacts of Incorporation and Annexation*

As a result of the protections incorporated in the County Code, residents of UMSA are shielded from impacts due to incorporations and annexations.

### *Services Provided by Municipalities*

Due to the provisions in the County Code, municipalities incorporated subsequent to 2000 are not providing solid waste services to their residents, since the County continues providing waste collection services.

### *Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

In accordance with the provisions contained in Sections 15-13 and 15-25.1 of the County Code, municipalities incorporated subsequent to 1996 are not experiencing any solid waste collection service changes, enhancements or reductions since they continue to be served by the County. As a matter of policy, the Department is willing, in the case of annexations, to delegate the authority to provide residential waste collection services to municipalities incorporated before 1996, provided that the municipality currently has an interlocal agreement with the County for waste disposal and that the cumulative impact of such delegation does not significantly impact the Department's ability to meet debt coverage requirements or to hold down the cost of collection. Areas annexed generally receive a similar level of garbage and trash service (twice per week), curbside recycling service (once per week) and unlimited use of Trash and Recycling Centers as County residents receive. If collection is delegated after annexation, municipalities provide a service to newly annexed areas consistent with the service provided to their existing residents.

## **F. Water and Sewer Department (WASD)**

### *Impacts of Incorporation and Annexation*

Incorporations and annexations do not impact the ability of WASD to provide water and sewer services to remaining unincorporated areas in the vicinity of an area to be annexed or incorporated. Ordinance 89-15 grants the Miami-Dade Water and Sewer Department the right to provide water and sewer service to all areas that incorporate or are annexed.

### *Managing the Impacts of Incorporation and Annexation*

Future water and sewer service customers within proposed incorporation or annexation areas would also receive service from the Department as incorporations and annexations do not change the jurisdiction of water and sewer service. Ordinance 05-141 requires that any facility of countywide significance, such as a Water Treatment Plant, within a proposed incorporation or annexation area that is owned by the Department remain under the County's regulatory authority.

### *Services Provided by Municipalities*

The Department provides water and sewer service to the four municipalities that have incorporated since 2000: Miami Lakes, Palmetto Bay, Doral and portions of Miami Gardens. The portions of Miami Gardens that are not serviced by the Department are serviced by the City of North Miami.

### *Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

Because of the provisions contained in Ordinance 89-15, the Department continues to provide services to newly incorporated or annexed areas. Thus, all of the incorporations and annexations since 2000 are receiving water and sewer services from WASD.

## **G. Team Metro**

### *Impacts of Incorporation and Annexation*

As a result of incorporation and annexation since the year 2000, Team Metro has encountered a loss of service area resulting in a total of 58.40 square miles with an approximate population of 185,000. However, only one incorporation has directly resulted in a staff reduction for the Department.

### *Managing the Impacts of Incorporation and Annexation*

The incorporation of Miami Gardens in 2003 necessitated the phasing out of the Team Metro North Central Regional Office consisting of 21 budgeted positions of which 18 were filled. The position reductions resulted in nine positions eliminated and the remaining nine positions reallocated to other Team Metro Regional Offices in order to provide enhanced countywide services. Notwithstanding the reduction of staff, services were not reduced in UMSA.

During the study period, population growth in UMSA has offset the geographical area and population lost. In FY 2000-01, the Department had one officer for every 15,413 residents of UMSA. Currently, that ratio is one officer for every 16,054 residents. This represents a 4.1% increase in the number of residents being served per code compliance officer. The changes in Chapter 2 and 19 of the Miami-Dade County Code have also increased the voluntary code compliance at the warning stage, thereby allowing the Department to handle more cases. It also provides the Department the ability to devote the necessary time to process, investigate and prepare cases for civil action or citations under Chapter 8CC.

Team Metro's budget for the FY 2005-06 includes funding for two new Neighborhood Compliance Officers (NCOs). Two NCOs assigned to the Environmental Investigative Unit Officers and a Service Representative position were reallocated to regional offices. In addition to these changes, seven current vacant NCOs will be fully funded through the year. A total of twelve NCOs will be incorporated into Team Metro enforcement activities to provide more proactive code enforcement in UMSA neighborhoods, thereby preventing any UMSA service level reductions.

### *Services Provided by Municipalities*

The new municipalities provide code enforcement services formerly provided by Team Metro prior to incorporation. In some cases the enforcement provided within the municipalities may be based on a modified version of the County Code, with a stricter enforcement regulation.

### *Comparison of Current Services Offered to UMSA Residents/Residents of New Municipalities*

Municipalities may exceed County Code enforcement provisions but may not go below the base line set by the County. Code enforcement within a municipality may be based on a modified version of the County Code, with a stricter enforcement regulation. Outreach services, which are a countywide function, continue to be offered; however, compliance functions funded utilizing UMSA dollars are discontinued. The code enforcement services within the new municipalities and in the annexation areas vary widely and are pursued along the priorities established by their local councils. Therefore, it is difficult to provide a comprehensive comparative service analysis.

## Section II – Status of Boundary Dispute Negotiations

On May 20, 2004, a report from the Florida Conflict Resolution Consortium (FCRC) was presented to the Board regarding the assessment of the feasibility of a mediated process to address boundary issues among various incorporation efforts in South Dade. The report was prepared in response to Resolution R-116-04, which directed the County Manager to enter into an agreement with the FCRC to assess the use of a collaborative process to resolve existing boundary issues among several incorporation initiatives. The FCRC is a statewide center based at Florida State University with a legislative charge pursuant to Section 1004.59, Florida Statutes to seek cost-effective solutions to public disputes and problems through the use of alternative dispute resolution and consensus building.

The 2004 report submitted by the FCRC concluded that “there is a high likelihood that a mediated process can result in mutually acceptable agreements that resolve or narrow many of the issues between the various groups.” Staff was instructed to use the mediation services of the FCRC and to provide a status report by July 13, 2004 detailing activities as to the state of issues affecting the Cutler Ridge and Goulds Municipal Advisory Committee (MAC) boundary disputes. The FCRC successfully mediated a boundary agreement between the two groups, pursuant to which the new municipality of Cutler Bay was established on November 8, 2005.

Following the Goulds/Cutler Ridge (Cutler Bay) boundary agreement, the FCRC continued to work with representatives of the remaining South Dade communities in conflict: Goulds, PLANT (Princeton, Leisure City and Naranja), Redland, and Redland's Edge; these conversations also included representatives from the City of Homestead.

The FCRC's November 28, 2005 final report (included as Attachment 8) indicates that these mediation efforts did not result in agreement between any of the communities in conflict. Meanwhile, PLANT and Redlands MACs have not held meetings since more than one year ago and the Goulds MAC decided recently to halt the incorporation feasibility study until the boundary dispute is resolved. Given the lack of resolution achieved among these groups, and that the issues that persist in dividing these communities remain unresolved, these incorporation efforts are likely to remain in indefinite hiatus lest they are induced to agree to proceed with their unresolved boundaries or to cease pursuit of municipal incorporation.

### Section III – Status of Independent Financial Analysis

On January 27, 2005, the Board of County Commissioners adopted Resolution R-130-05 directing independent budget and service impact analyses for proposed municipalities. The County Manager was directed to retain the services of an independent third party with expertise in government operations and financing to act as a consultant to review impact statements for proposed municipalities prepared by the County and each Municipal Advisory Committee (MAC) budget and service impact analyses. In September 2005, a contract with the firm of PMG Associates, Inc. (PMGA) was executed. The charge to PMG was to:

- Review and validate Miami-Dade County's methodology for estimating the budgetary impact of incorporations to UMSA and make recommendations for adjustments to the methodology where appropriate.
- Review, analyze and validate Pro Forma presentations prepared by each MAC to determine whether proposed revenues and expenditures represented reasonably accurate estimates, taking into account the size, financial conditions, and service levels of the proposed municipality and including a comparison of the proposed MAC to peer jurisdictions.
- Review the proposed incorporations of Fontainebleau, North Central, and Northeast Dade for viability. Each of these MACs has completed the Boundaries Commission (now defunct) and Planning Advisory Board public hearing requirements of the incorporation process.

In its report, PMGA validated that the County's "Impact to UMSA" analysis is a rational method for determining the fiscal impact of proposed incorporations on the UMSA portion of the County budget. PMGA indicated that the analysis – for which the cost allocation factors used in calculating revenues and expenditures are updated annually – allows for the most recent data to be used at all times while considering proposed incorporations and/or annexations (Attachment 9). Two recommendations for enhancing the County's methodology were made by PGMA: (1) that State shared revenues be included in the "revenue loss" calculations, and (2) that population estimates based on U.S. Census data be enhanced by taking into account incremental residential development over time (through GIS analysis of building permit/certificate of occupancy data). Staff is investigating the possibility of implementing the latter recommendation. Implementation of the former recommendation, however, would result in a distortion (overestimation) of losses to UMSA, as State shared revenues are not in fact lost from the UMSA budget as a result of incorporation.

With regard to the proposed budgets of Fontainebleau (Attachment 10) and North Central (Attachment 11), PMGA concluded that neither provided for a viable municipality, recommending for each that either (1) the police budget line item be reduced significantly (to follow such a recommendation, however, would mean providing a level of local police below the minimum staffing requirement), or (2) the municipal millage rate be increased (the report acknowledges, however, that this would not be a viable option for either area). In the case of North Central, PMGA noted the Community Redevelopment Area (CRA) study under way in the area as an issue that must be settled prior to establishment of the proposed municipality. Under the provisions of the CRA legislation, a County-formed CRA cannot operate within municipal limits. If the CRA is created, it will pose a problem legislatively for the municipality. Furthermore, a CRA would limit the expansion of the tax base while tax increment financing is applied.

PMGA's analysis of the proposed Northeast incorporation area (Attachment 12) concluded that a viable municipality could be developed since projected revenues exceed proposed expenses and the level of proposed services appears to address the needs of the community.

## Section IV – Existing and Potential Enclaves

The County currently has 15 existing enclaves – areas with perimeters more than 80 percent bordered by one or more municipalities. Access to enclaves for the delivery of services often is difficult, inefficient, or even ineffective.

Five of the existing enclaves are the subject of five pending incorporation and/or annexation applications. If all of these proposed incorporations and annexations are approved, 10 enclaves will be left intact and the remaining five enclaves will be restructured into six enclaves. In addition to these 16 enclaves, approval of all proposed incorporations and annexations will create one additional enclave, creating a total of 17 enclaves in the County.

Thus, not fewer but more enclaves would result under the current trend. Without a targeted strategy aimed at the elimination of enclave areas, it appears likely that enclaves will persist and even increase in number. Initiating a dialogue with enclave-bordering municipalities could result in the identification of mutually-agreeable conditions for expediting the annexation of enclaves. However, in the case of bordering municipalities disinterested in pursuing annexation, the County does not possess that authority, under the Charter, to force annexation of an enclave.

The charts on the following pages describe: (1) enclaves currently *existing*, (2) enclaves potentially *resulting* from the approval of current incorporation or annexation proposals associated with enclaves, and (3) the *new* enclave that would result from the approval of all current incorporation or annexation proposals. Maps of these areas are available at Attachments 13 and 14.

## Existing Enclaves

Map	Area	Description	Boundaries	Status
1	Northeast	Large enclave located south of County Line Road (NW NE 715th Street) west of West Dixie Highway	North: Broward County East: City of Aventura South: City of North Miami Beach West: City of Miami Gardens	The portion of this area located east of Interstate 95 consists of the Northeast MAC Area
2	North Miami Beach A	Enclave wholly surrounded by the City of North Miami Beach and located west of NE 2nd Avenue		No Activity
3	North Miami Beach B	Enclave wholly surrounded by the City of North Miami Beach and located east of NE 2nd Avenue		No Activity
4	North Miami Beach C (Windward Area)	Enclave wholly surrounded by the City of North Miami Beach and located east of NE 6th Avenue		This area consists of the North Miami Beach annexation application
5	Biscayne Gardens	Large enclave located south of NE NW 167th Street and east of NW 17th Avenue	North: Cities of North Miami Beach and Miami Gardens East: Cities of North Miami and North Miami Beach South: City of North Miami West: Cities of Opa Locka and North Miami	This area consists of the Biscayne Gardens MAC Area and an annexation application from the City of North Miami
6	North Central and Shores	Large enclave located south of NW 135th Street and generally east NW 37th Avenue	North: Cities of Opa Locka and North Miami East: Municipalities of North Miami, Biscayne Park, Miami South: City of Miami West: Cities of Opa Locka and Hialeah	Portions of this area are included in the North Central MAC and an annexation proposal by the Village of Miami Shores
7	North Miami - Claude Pepper Park Area	Enclave wholly surrounded by the City of North Miami and located south of NW 135th Street and east of NW 16th Avenue		No Activity
8	Biscayne Shores	Enclave located south of NE 121st Street and west of Biscayne Bay	North: City of North Miami East: Cities of North Miami and Biscayne Bay South: Village of Miami Shores West: Villages of Biscayne Park and Miami Shores	No Activity
9	Belmar	Enclave located north of NE 87th Street and east of Biscayne Boulevard	North: Village of Miami Shores East: Biscayne Bay South: City of Miami West: Village of Miami Shores	No Activity
10	El Portal - Horace Mann	Enclave wholly surrounded by Village of El Portal and located east of NW 2nd Avenue		No Activity
11	El Portal - Miami	Enclave is located between the boundaries of the Village of El Portal and the City of Miami west of		No Activity
12	Opa Locka Airport	This Enclave includes two regional facilities, Amelia Earhart Park and the unincorporated portion of the Opa Locka Airport. Exclusion of these facilities from the enclave, results in a small, unincorporated enclave located just west of the City of Opa Locka and north of the Gratigny Parkway		No Activity
13	Hialeah	Enclave wholly surrounded by the City of Hialeah and located west of W. 4th Avenue/NW 57th Avenue		No Activity
14	Little Gables	Enclave located south of SW 8th Street and east of SW 47th Avenue	North: Miami East: Coral Gables South: Coral Gables West: Coral Gables	No Activity
15	High Pines	Enclave located south of SW 72nd Street and east of SW 57th Avenue	North: Coral Gables East: Coral Gables South: Coral Gables West: South Miami	Portions of this area are included in a City of Coral Gables annexation application of an area known as Davis Ponce

### Resulting Enclaves

Map	Area	Description	Boundaries
1	Northeast	Enclave located south of County Line Road (NW/NE 215th Street) west of Interstate 95	North: Broward County East: Interstate 95 – Northeast MAC South: City of North Miami Beach West: City of Miami Gardens
2	North Central - Shores Area 1	Shores Area 1. Enclave generally located south of NW 119th Street and east Interstate 95	North: City of North Miami East: Municipalities of North Miami and Biscayne Park South: Village of Miami Shores West: Interstate 95/North Central MAC and the Village of Miami Shores
3	North central - Shores Area 2	Enclave generally located south of NW 111th Street and east Interstate 95	North: Village of Miami Shores East: Municipalities of Miami Shores, El Portal and Miami. South: City of Miami West: Interstate 95/North Central MAC
4	North Central - Model City Area	Enclave generally located south of NW 62 <sup>nd</sup> Street and west NW 17 <sup>th</sup> Avenue	North: North Central MAC East: City of Miami South: City of Miami West: City of Hialeah
5	Miami - Melrose Area	Enclave located along the Miami River and west of NW 27th Avenue	North: City of Miami East: City of Miami South: Miami River and MIC/MIA Area West: City of Miami and the Miami River
6	High Pines	Enclave located south of SW 72nd Street and east of SW 57th Avenue	North: Coral Gables East: Coral Gables South: Coral Gables West: South Miami

### New Enclave

Map	Area	Description	Boundaries
1	Redland Edge Area One	Enclave located along the US 1 corridor south of the Redland MAC/UDB line, generally west of SW 137th Avenue	North: Redland MAC/UDB line East: PLANT MAC and City of Homestead South: PLANT MAC and City of Homestead West: UDB line and City of Homestead

## Section V – Conclusions and Recommendations

The incorporation and annexation of approximately 58.40 square miles of UMSA service area since the year 2000 has created a challenging environment for maintaining the quality of UMSA service delivery. County departments responsible for the provision of municipal services to UMSA residents have devoted considerable effort to realigning personnel, infrastructure, budgets, operational programs, and long-range plans in order to maintain (or, in some cases, minimize negative impacts to) staffing ratios, response times, and maintenance cycles in the wake of post-2000 boundary adjustments.

It is expected that these efforts, and the negative impacts driving them, will continue and likely intensify over time, if additional UMSA service area and associated revenues are lost to incorporation and annexation. Of greater concern is the likelihood that these losses will limit our ability to enhance the quality of municipal service delivery to UMSA residents. While financial mitigation and Code provisions protecting the operations of some proprietary functions have helped minimize the negative impacts of incorporation and annexation, the UMSA budget and its associated services and programs have not been kept whole over the past five years. Together, affected departments and the Office of Strategic Business Management will pursue further analysis to determine more precisely the extent to which incorporation and annexation related costs are being absorbed by the UMSA budget and to develop a set of recommendations for addressing this concern. Already, the Miami-Dade Police Department's Municipal Services Unit is reviewing its methodology for allocating all appropriate costs for contractual services. Furthermore, in an effort to better estimate the potential costs of a proposed incorporation or annexation, MDPD and OSBM are now developing a refined, data-driven alternative to the current methodology for estimating local policing costs.

The specific issues addressed by this report – impacts to UMSA, boundary disputes, fiscal viability of proposed incorporations, and enclaves – are several among many interconnected issues that have been considered in various forums – since the year 2000. Legislation has been adopted during this time period addressing the incorporation and annexation process, regulatory control of facilities of “countywide significance”, and refining the County's policies relating to debt service obligations and mitigation for annexations that are not revenue neutral. Additional issues for which the adoption or refinement of specific policies has been considered or that are otherwise timely include the incorporation or annexation of areas lying outside of the County's urban development boundary, the scheduling of incorporation-related elections, municipal budget authority during transitional periods, and opt-out provisions for areas not wishing to incorporate. Recommendations regarding each of these issues are presented below:

### *Urban Development Boundary*

While staff generally recommends that incorporations or annexations outside the Urban Development Boundary (UDB) not be approved, in cases where the Board determines that it is in the County's best interest to approve annexations or incorporations of areas outside the UDB, it is recommended that regulatory authority for purposes of Comprehensive Development Master Plan (CDMP) amendment, zoning and building approvals, water and sewer installations, and compliance with environmental and utility regulation be retained by the County as a pre-agreed condition for approval. See Attachment 15 for a recommended process for future CDMP amendments and zoning changes.

### *Incorporation Elections*

Elections for incorporations or annexations are scheduled after the BCC approves a vote on the issue. There is concern that voter turnout for recent incorporation elections have been poor in comparison to that of earlier incorporation elections. In order to increase voter turnout, it is recommended that elections related to the creation of new municipalities be held in conjunction with countywide general elections. It is also recommended that initial municipal elections should be scheduled on dates coinciding with countywide elections. Such a practice should enhance voter turnout and spare both the municipality and the County the costs of holding separate elections.

### *Municipal Budget Authority*

A municipality may levy taxes against the tax roll effective on January 1 following the creation of the municipality. Prior to this point, the millage rate is set by the BCC as the UMSA millage rate. For a recipient community this may not generate revenues sufficient to provide desired levels of service within its borders. Therefore, for a recipient community, it is recommended that for the transition period prior to the adoption of the first municipal budget, the BCC retain budgetary control over revenues and expenditures. The transition period should be limited to the timeframe between the adoption of the Charter and the latter of the municipal council's third meeting or the meeting at which the council adopts its current municipal budget. Normally, there is an average of 45 days following the adoption of a municipal charter in which the municipality has not elected the members of its council. Once the municipal council convenes it would seek community inputs on service levels and municipal budget information; with the public input the council would be able to adopt service levels that correspond to the revenues collected in the new municipality prior to formally adopting a municipal budget. Thus, setting the transition period, subject to extension as needed, to no later than the third council meeting will provide the municipal council with time to address service level needs and projected revenues prior to assuming the full governance of the new municipality. During this transition period, the new municipality will be eligible to receive funding through state municipal revenue sharing and the County could advance additional available funds, to be repaid in future years to fund start-up activities. In order to avoid the potential fiscal burden on the municipality during the transition period, it is recommended that the municipality should continue to be included as part of UMSA for the provision of services until the municipal council adopts its budget. Following the transition period the municipality may adjust service levels and appropriate millage rates for the subsequent budget year.

### *Opt-Out Provision*

It is recommended that the following process be adopted to allow areas to opt out of a proposed incorporation or annexation, provided that opting out does not create an enclave. Under the proposed process, the area desiring to opt out of an incorporation or annexation would present a petition to the Clerk of the Board. This petition, after validation by County staff, would be presented for acceptance by the BCC. Staff would then be directed to provide options for the requested adjustment of boundaries and to report on the fiscal impact of proposed changes. The petition must be submitted prior to consideration of the proposed incorporation or annexation by the Planning Advisory Board. Should the Board desire to pursue this policy, staff will provide options regarding signature requirements and criteria for determining revised boundaries for this process in the proposed legislation.

One additional issue warranting mention is that of mitigation. Current Miami-Dade County policy requires that newly incorporated donor municipalities, the incorporation of which has a negative fiscal effect on the remaining unincorporated municipal service area, make an annual payment into the County's municipal service trust fund (MSTF) in order to mitigate that financial loss. The amount of the loss to UMSA is calculated by subtracting the estimated cost of providing services from the gross revenues collected in the incorporating area. The mitigation payment is determined by the BCC and has, in all cases to date, been less than the amount of the actual loss. Municipal charters and conceptual agreements all contain language that address the initial and subsequent calculation of payments, as well as the conditions under which the need for the payments may be revisited.

Periodically, since the inception of this practice, municipalities subject to mitigation as well as communities pursuing incorporation have sought revisions to or the elimination of the mitigation requirement. Efforts to have the mitigation concept declared invalid by the courts have fallen short, as did a recent corresponding effort in the State Legislature. On March 21, 2006, the Board of County Commissioners adopted Resolution R-342-06 establishing a seven-member Mitigation Adjustment Policy Review Task Force; this task force "shall conduct a study and submit a recommendation to the Board of County Commissioners as to an appropriate policy for the adjustment of mitigation payments paid by the Town of Miami Lakes, the Village of Palmetto Bay, and the City of Doral, and any additional matters as requested by the Infrastructure and Land Use Committee of the County Commission" within 60 days.

Ultimately, the dynamic nature of the incorporation/annexation landscape in Miami-Dade County demands ongoing analysis, assessment, and, as appropriate, policy revision. Ideally, these can be carried out in an atmosphere of cooperation and goodwill, as a partnership between policymakers, public administrators, and citizens. To this end, Miami-Dade County should take a leadership role in building a strong working relationship between County and municipal government aimed at ensuring equitable community representation and quality service delivery for every Miami-Dade resident. Our residents deserve nothing less.

**Miami-Dade Police Department's Response Times**

**Attachment 1**

<b>Miami Gardens</b>	<b>Emergency</b>	<b>Emergency</b>	<b>Routine</b>	<b>Routine</b>
Date	October-03	July-05	October-03	July-05
Incidents	430	480	10,513	8,466
Response Times	0.04.15	0.06.39	0.12.05	0.17.59

Local Patrol services were established on 12/1/2003

<b>Doral</b>	<b>Emergency</b>	<b>Emergency</b>	<b>Routine</b>	<b>Routine</b>
Date	January-04	July-05	January-04	July-05
Incidents	120	109	3,760	4,366
Response Times	0.04.36	0.03.56	0.19.21	0.08.32

Local Patrol services were established on 4/5/2004

<b>Miami Lakes</b>	<b>Emergency</b>	<b>Emergency</b>	<b>Routine</b>	<b>Routine</b>
Date	September-01	July-05	September-01	July-05
Incidents	50	82	1,906	2,279
Response Times	0.02.58	0.02.47	0.11.37	0.05.08

Local Patrol services were established on 11/14/2001

<b>Palmetto Bay</b>	<b>Emergency</b>	<b>Emergency</b>	<b>Routine</b>	<b>Routine</b>
Date	May-03	July-05	May-03	July-05
Incidents	30	69	1,376	1,934
Response Times	0.04.15	0.02.43	0.17.21	0.05.39

Local Patrol services were established on 7/1/2003

Estimated Miami-Dade Police Department's Organizational Sworn Officers Chart (July 13, 2005)

Attachment 2

District	Officer			Sergeant			Lieutenant			Captain			Major		
	Assigned	Filed	Vacancy	Assigned	Filed	Vacancy	Assigned	Filed	Vacancy	Assigned	Filed	Vacancy	Assigned	Filed	Vacancy
<b>North Ops.</b>															
Intraoasis	130	126	4	28	27	1	7	7	0	1	1	0	1	1	0
Northside	220	204	16	31	30	1	7	7	0	1	1	0	1	1	0
Northwest	110	106	4	25	22	3	7	7	0	1	1	0	1	1	0
<b>North Total</b>	<b>460</b>	<b>436</b>	<b>24</b>	<b>84</b>	<b>79</b>	<b>5</b>	<b>21</b>	<b>21</b>	<b>0</b>	<b>3</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>3</b>	<b>0</b>
<b>South Ops.</b>															
Outler Ridge	160	165	-5	26	25	1	8	7	1	1	1	0	1	1	0
Midwest	128	120	8	23	22	1	7	6	1	1	1	0	1	1	0
Hammocks	175	158	17	27	26	1	6	6	0	1	1	0	1	1	0
Kendall	157	133	24	30	26	4	7	7	0	1	1	0	1	1	0
Ag. Patrol	19	16	3	3	3	0	1	1	0	1	0	1	0	0	0
<b>South Total</b>	<b>636</b>	<b>592</b>	<b>44</b>	<b>109</b>	<b>102</b>	<b>7</b>	<b>29</b>	<b>27</b>	<b>2</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>4</b>	<b>4</b>	<b>0</b>
<b>Police Operations</b>	<b>45</b>	<b>35</b>	<b>10</b>	<b>9</b>	<b>11</b>	<b>-2</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>
Special Patrol	49	48	1	10	10	0	5	5	0	1	1	0	1	1	0
Aviation	9	9	0	2	2	0	1	1	0	0	0	0	0	0	0
Special Events	5	4	1	4	4	0	2	2	0	1	1	0	0	0	0
Motors	19	18	1	5	5	0	1	1	0	0	0	0	0	0	0
Marine Patrol	18	18	0	4	4	0	1	1	0	0	0	0	0	0	0
<b>Uniform Ser. Total</b>	<b>145</b>	<b>132</b>	<b>13</b>	<b>34</b>	<b>37</b>	<b>-3</b>	<b>15</b>	<b>14</b>	<b>1</b>	<b>3</b>	<b>3</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>0</b>
<b>Contract</b>															
Miami Gardens	120	119	1	17	17	0	6	5	1	1	1	0	1	1	0
Miami Lakes	36	36	0	6	4	2	1	1	0	1	1	0	1	0	0
Palmetto Bay	32	29	3	5	6	-1	1	1	0	1	1	0	0	0	0
Doral	57	54	3	9	9	0	4	4	0	1	1	0	0	0	0
Seabrook	18	18	0	4	4	0	4	5	-1	1	0	1	0	0	0
Alhambra	110	108	2	23	22	1	7	7	0	1	1	0	1	1	0
JMH	6	6	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Contract Total</b>	<b>379</b>	<b>370</b>	<b>9</b>	<b>64</b>	<b>62</b>	<b>2</b>	<b>23</b>	<b>24</b>	<b>-1</b>	<b>6</b>	<b>5</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>0</b>
<b>Police Service Total</b>	<b>1620</b>	<b>1530</b>	<b>90</b>	<b>291</b>	<b>280</b>	<b>11</b>	<b>88</b>	<b>86</b>	<b>2</b>	<b>17</b>	<b>15</b>	<b>2</b>	<b>14</b>	<b>14</b>	<b>0</b>
<b>Impacts</b>															
Contract Total	379	370	9	64	62	2	23	24	-1	6	5	1	2	2	0
Town of Cutler Bay*	29	29	0	5	5	0	2	2	0	1	1	0	0	0	0
<b>Total UMSA Resources</b>	<b>1212</b>	<b>1131</b>	<b>81</b>	<b>222</b>	<b>213</b>	<b>9</b>	<b>63</b>	<b>60</b>	<b>3</b>	<b>10</b>	<b>9</b>	<b>1</b>	<b>9</b>	<b>9</b>	<b>0</b>

\* The Town of Cutler Bay resources are based on minimum staffing levels required for contract police services. The contracted services are anticipated to impact the late FY 05/06 or early FY 06/07.  
 \*\* Since this study was initiated, MPI 83 graduated 34 police officers on 09/15/2005.

Attachment 3  
Sworn to Services Population Ratio Chart

Venues	Population*	Land size (Sq. Miles)	Total Sworn	Total Sworn per 1,000	Sworn Officer	Officer per 1,000	District Officers	District Officer per 1,000
<b>Countywide (2000 Census)</b>	<b>2,253,485</b>	<b>2,382.03</b>	<b>2,985</b>	<b>1.32</b>	<b>2,268</b>	<b>1.01</b>	<b>N/A</b>	<b>N/A</b>
Countywide (2004 Projection)	2,379,818	2,382.03	3,105	1.30	2,333	0.98	1530	0.64
<b>Pre- Contract MDPD Service Area (2000 Census)</b>	<b>1,204,288</b>	<b>2,094.24</b>	<b>2,985</b>	<b>2.48</b>	<b>2,268</b>	<b>1.88</b>	<b>N/A</b>	<b>N/A</b>
MDPD Service Area (2004 Projection)	1,284,377	2,094.24	3,105	2.42	2,333	1.82	1530	1.19
Town of Miami Lakes (November 2002)	24,835	6.49	42	1.69	36	1.45	36	1.45
Village of Palmetto Bay (July 2003)	24,903	8.55	37	1.49	29	1.16	29	1.16
City of Miami Gardens (December 2003)	105,414	19.66	144	1.37	119	1.13	119	1.13
City of Doral (April 2004)	30,285	15.45	68	2.25	54	1.78	54	1.78
Seaport	0	0.00	27	N/A	18	N/A	18	N/A
Airport	0	5.05	142	N/A	110	N/A	110	N/A
JMH	0	0.00	6	N/A	6	N/A	6	N/A
<b>Current UMSA**</b>	<b>1,098,940</b>	<b>2,039.04</b>	<b>2,639</b>	<b>2.40</b>	<b>1,961</b>	<b>1.78</b>	<b>1,158</b>	<b>1.05</b>
<b>Pending Transitional Municipality</b>								
Town of Cutler Bay	30,315	11.30	37	1.22	29	0.96	29	0.96
Projected UMSA	1,068,625	2,028	2,602	2.43	1,932	1.81	1,129	1.06

\* populations are based on 2004 projected Census data provided by DP&Z.

Attachment 4  
Emergency Calls-For-Service Comparison

Year (Jan 1 - Dec 31)	2000	2001	2002	2003	2004	2005
Emergency Calls (min:sec)	3:48	3:53	3:56	4:07	4:13	5:09

Source: Crime Information Warehouse

# Attachment 5

Increased Positions Provided to Municipalities  
Variance of Minimum Staff to FY 2005 - 2006 Request

Classification	Minimum Staffing	Contracted Staffing	Additional Staffing FY 02/03	Additional Staffing FY 03/04	Additional Staffing FY 04/05 (**)	Total Requested Positions As of 04/13/05 for FY 04/05	(Variance Between Minimum Staffing and Total Request) (**)	Variance Between Contracted Staffing and Total Request (**)
Mayor	1	1	0	0	0	1	0	0
Captain	4	4	0	0	0	4	0	0
Lieutenant (incl. 1st Lt.)	7	7	0	0	2	9	2	2
Lieutenant (Exe Off Adm)	3	3	0	0	1	4	1	1
Sergeant	33	36	0	0	1	37	4	1
Corporal	0	0	0	0	6	6	6	6
Officer	227	243	2	1	-7	239	12	-4
Police Officer (for Desk Operations)	0	0	0	0	3	3	3	3
Motorcycle Officer	0	0	0	0	1	1	1	1
<b>Subtotal Sworn</b>	<b>275</b>	<b>294</b>	<b>2</b>	<b>1</b>	<b>7</b>	<b>304</b>	<b>29</b>	<b>10</b>
Adm Secretary	1	1	0	0	0	1	0	0
Police Records Specialist	7	8	0	0	4	12	5	4
Police Crime Analyst	6	5	0	0	2	7	1	2
Secretary	4	4	0	0	0	4	0	0
Data Entry Specialist	1	1	0	0	0	1	0	0
Office Support Specialist	2	2	0	0	0	2	0	0
Public Service Aide	11	11	0	0	2	13	2	2
Police Station Specialist	1	1	0	0	0	1	0	0
<b>Subtotal Civilian</b>	<b>33</b>	<b>33</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>41</b>	<b>8</b>	<b>8</b>
<b>Total Sworn and Civilian</b>	<b>308</b>	<b>327</b>	<b>2</b>	<b>1</b>	<b>15</b>	<b>345</b>	<b>37</b>	<b>18</b>

**Summary:**

Since incorporation, Municipalities have requested 37 positions (29 sworn; 8 civilian) over the original minimum staffing recommendation; 18 positions (10 sworn; 8 civilian) over the original contracted amount  
For FY 2004-05, 15 additional positions (7 sworn, 8 civilians) were requested; Bodies and positions are transferred from UMSA to the Incorporated areas. In order to maintain UMSA whole (backfill), 15 overages are requested

**Note:**

\*FY 2004/2005 reflects the Municipalities' Adopted Budgeted Positions  
\*\*FY 2004/2005 reflects a reduction of 7 Police Officers due to conversion to 6 Corporals and 1 Sergeant

FY 06/07 Projected DROP\* Impact on Sworn & Non-Sworn Resources\*\*  
Attachment 6

	Total Sworn Personnel			
	Assigned	05 Drop	06 Drop	Remaining Staff
Total Department	3151	50	42	3059
Current Contract	299	0	0	299
Pending Contract***	37	0	0	37
UMSA Total	2814	50	42	2722

	Total Non-Sworn Personnel			
	Assigned	05 Drop	06 Drop	Remaining Staff
Total Department	1473	10	17	1446
Current Contract	38	0	0	38
Pending Contract	10	0	0	10
UMSA Total	1425	10	17	1398

	Total Departmental Personnel			
	Assigned	05 Drop	06 Drop	Remaining Staff
Total Department	4624	60	59	4505
Current Contract	337	0	0	337
Pending Contract	47	0	0	47
UMSA Total	4239	60	59	4120

1) Drop Employees - Enrollee Report (01/15/2005)

2) Miami-Dade Police Department Adjusted Table of Organization (MAINFRAME) Report (7/13/2005)

\*Deferred Retirement Option Program - a program of the State of Florida that allows employees to retire under the Florida Retirement System Pension Plan and begin accumulating retirement benefits, without terminating employment, for up to 60 months from the date the employee first reach normal retirement or eligible deferral date.

\*\* This does not take into consideration normal attrition (i.e. early retirement, termination, etc.)

\*\*\* Pending contract consist of the Cutler Ridge MAC area.

**Miami-Dade Police Department**  
**Training Bureau**  
**Projected Schedule of Classes**  
**FY 04/05 (Attachment 7)**  
**Four Class Schedule**  
**Revised 07/01/2005**

	MPI 93	MPI 94	MPI 95	MPI 96	MPI 97	MPI 98
Assigned Training Advisors	Rego Atherly	Le Counte Montero	Harrison Johnson	TBA	TBA	TBA
Students Assigned	34	37	43	44*	44*	44*
State Required Training	12/13/04 to 07/22/05	03/21/05 to 10/21/05	06/13/05 to 1/20/06*	09/26/05 to 04/21/06		
State Certification Exam	7/27/2005	10/20/2005	01/25/06*	04/26/06*		
Practicum Dates	08/26 thru 09/2/05	11/30/05 thru 12/07/05*	2/27/06 thru 03/06/06	TBA	TBA	TBA
Graduation	09/15/05*	12/13/05	3/17/06	6/30/06		
Available to District	9/19/05	12/16/05*	3/20/06	7/3/06		



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PROCESS REPORT  
SOUTH DADE INCORPORATION AND ANNEXATION  
BOUNDARIES MEDIATION

November 28, 2005

This report outlines activity in South Dade incorporation boundaries mediation since May of 2004 and summarizes the status of negotiations as of the end of November, 2005.

March - May

During this period, the mediation team conducted an assessment to determine the issues that would need to be addressed in any effort to resolve incorporation boundaries issues in South Dade, and whether the parties would be willing to engage in a process to resolve them. The results of that assessment are available in a separate document entitled *Assessment of the Feasibility of a Mediated Process to Address Boundary Issues Among Incorporation Efforts in South Dade County*.

June - July 2004

During June and July 2004, the mediation team focused on issues between Cutler Ridge and Goulds in order to fully explore the possibility of an agreement that would meet the needs of both parties and still allow the question of Cutler Ridge incorporation to be placed on the November 2004 ballot. The two parties reached agreement in July 2005. This agreement is on record with the County.

August - October 2004

During August 2004 the mediation team focused on issues between Goulds, PLANT (Princeton, Leisure City and Naranja), Redland, Redland's Edge and, to a lesser extent, the City of Homestead. The team conducted several rounds of meetings with negotiators for each of the incorporation efforts separately, in order to develop a framework for initiating face-to-face negotiations between them. In late August and early September 2004, changes in the position of some parties necessitated additional rounds of discussions. By early October 2004, the mediation team had concluded these discussions, developed a framework for negotiations, and scheduled a meeting to initiate face-to-face negotiations between the parties for October 30, 2004.

In October 2004, the Redland incorporation petition submitted by Friends of Redland in May of 2004 appeared on the Boundaries Commission agenda for October 20, 2004. This prompted the negotiators for Goulds and PLANT to request that face-to-face negotiations be placed on hold to allow them time to fully understand and respond to the petition's implications for them. The mediation team subsequently contacted negotiators for each of the parties in order to explore and assess the implications of the petition from their point of view.

At the end of October 2004, therefore, face-to-face negotiations were placed on hold to allow the Goulds and PLANT negotiators to reach conclusions regarding how they would proceed.

#### **November 2004 – May 2005**

From November of 2004 through May of 2005, there was pause in the negotiations. The negotiation team had a variety of conversations with the negotiators from each community during this period. While these conversations resulted in some progress on issues relating to County support for the Goulds and PLANT incorporation efforts, none of these conversations resulted in the resumption of negotiations among the parties.

Several events in April of 2005 seemed to offer the possibility resuming negotiations: the Redland incorporation effort appointed new spokespeople to represent it in the negotiations; the Goulds and PLANT negotiators indicated their willingness to explore a resumption of negotiations; and the Redland's Edge negotiators indicated renewed willingness to explore alternative boundaries.

The mediation team therefore met with the Goulds and PLANT negotiators, and held discussions with the negotiators from each of the other communities, in order to explore on what terms negotiations might be resumed. Two major issues emerged from these discussions. The first is the potential role in the negotiations of the so-called "uncontested area" east of US 1 (an area surrounding PLANT and extending east to Biscayne Bay). The PLANT negotiators asked for a clarification of whether this area might be "on the table" for the negotiations. The second issue is a potential new "starting line" for negotiations between Goulds and Redland representatives. The Goulds negotiators requested that the Redland negotiators propose a revised boundary line to demonstrate good faith and provide a new starting point for negotiations.

#### **June 2005 – November 2005**

During this period the mediation team explored the issues that were raised in the April and May conversations: 1) whether Goulds or Redland negotiators would be willing to offer as a starting point a new boundary line different from those that had been publicly discussed, and what the rationale might be for such a boundary; and 2) whether any of the unincorporated areas east of US 1 might be on the table for the negotiations.

Productive discussions took place between the Chair of the PLANT MAC and Commissioner Sorenson's office regarding the unincorporated areas east of US 1. None of the groups, however, were willing to offer a different boundary or rationale for a boundary in advance of face-to-face negotiations.

The following paragraphs summarize the current stance of each party relative to the negotiation (not their position on substantive issues) at the end of November 2005.

#### *Goulds*

Negotiators for Goulds remain unwilling to engage in negotiations under current conditions. In their view, these conditions include concerns about the good faith of Redland negotiators, the ongoing litigation related to the Redland incorporation petition, and insufficient progress on the issues they outlined in the April and May 2005 discussions.

#### *Homestead*

Homestead initially expressed a willingness to discuss issues related to its annexation policy that were of concern to Redland and Redlands Edge, although it highlighted difficulties in reaching agreement on those issues. The mediation team has not asked the City of Homestead to engage in any discussions of boundaries issues since early 2005, pending clarification of the position of other parties.

#### *PLANT (Princeton, Leisure City and Naranja)*

The chair of the PLANT MAC has expressed a willingness to engage in negotiations with Redland, and continues to explore issues related to incorporation effort boundaries, such as those related to areas east of US 1 outside of any current MAC boundaries. He has also expressed a willingness to engage in discussions with Redland's Edge representatives.

#### *Redland*

Negotiators for Redland have remained willing to engage in negotiations, although they highlight a number of difficulties in the way of reaching agreement. They have indicated, however, that if agreement is reached in the negotiations, such an agreement should serve as the basis for resolving all issues related to the boundary between Goulds, PLANT and Redland, including issues related to the Friends of Redland petition.

#### *Redland's Edge*

The group exploring Redland's Edge incorporation has elected to pursue its goals in a way that no longer poses a boundary conflict between Redland's Edge incorporation or community building activities and the Goulds incorporation effort. It continues to express a desire to explore potential common interests with the PLANT incorporation effort, and continuing differences over annexation issues with Homestead.

#### *Summary of Status as of November 28, 2005*

As of November 28, 2005, negotiations are at an impasse, as they have been since October of 2004. In the time since then, there has been discussion of conditions under which negotiations might resume, and some indirect communication among the parties through the mediators, but no direct negotiation among the parties themselves. In the judgment of the mediators, no additional

progress can be made until all key parties are willing to participate, with the assistance of a mediator, in such negotiations.

#### **Prospects for Future Agreements**

Some circumstances in South Dade have changed since May 2004, notably the initiation of litigation by representatives of Redland in an effort to move their incorporation activities forward. Nevertheless, the substantive and relationship issues in the dispute, and their importance to the communities involved, continue to be those outlined in the initial *Assessment* report. What has changed is the expressed willingness of key parties to engage in a mediated resolution process.

If all parties were to choose to resume negotiations, the mediation team continues to believe that a resolution of the central issue, the boundary between the Goulds and Redland incorporation efforts, is possible in a way that would ultimately be acceptable to both parties. Other issues related to incorporation effort boundaries should also be resolvable, once the central issue is settled.

**ANALYSIS OF THE EXISTING  
FINANCIAL MODEL  
TO DETERMINE THE  
ESTIMATED IMPACT ON UMSA  
REVENUES AND EXPENSES  
DECEMBER 2005**

PMG Associates, Inc.  
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**ANALYSIS OF THE EXISTING FINANCIAL MODEL  
TO DETERMINE THE  
ESTIMATED IMPACT ON UMSA REVENUES AND EXPENSES**

The firm of PMG Associates, Inc. (PMGA) was engaged by Miami-Dade County Office of Strategic Business Management to perform an analysis of the Model used to evaluate incorporation scenarios throughout the County. This Model is applied to determine the fiscal impact of the incorporation of any areas of Miami-Dade County as it relates to the operation of the Unincorporated Municipal Service Area (UMSA) portion of the County budget. Each incorporation application that is processed in the County is reviewed to determine the net fiscal impacts measuring the lost revenues to UMSA and the reduced expenditures for the operating departments of the County.

The Model has been developed over the years by the UMSA Policy Analysis and Services Planning Unit of the County and is modified on a continual basis. Each year, as updated data is available, the cost allocation factors are adjusted. This process allows for the most recent data to be used at all times.

**DATA SETS**

The process begins with the inclusion of a series of data that is used in the later calculations. The data used in the analysis includes:

Taxable Property Rolls      Obtained from the Miami-Dade County Property Appraiser's Office. All parcel information is selected from the property located within the designated boundaries of the targeted area. The Total Taxable Value is an aggregate of these properties. This information is the only appropriate data for the purpose of determining the value of the properties.

Census Population      Population estimates are required to allocate revenues and expenses to the proposed incorporated entity. The current method of obtaining the population is for the Planning and Zoning Department to research the 2000 Census to develop the figures. Census Tract, Block Group and Individual Block Data are available from the Bureau of the Census.

The data used in this step of the process is somewhat dated for many of the proposed incorporation analyses. As the time frame for the analysis moves further from the Census date, the data can become obsolete. For those areas that experience a significant amount of growth, the data can become unusable after a few years. The use of Census data has been employed because the source is a

standard and is easy to obtain. However, some concerns exist for its use in portions of Miami-Dade County.

<u>UMSA Millage</u>	This figure is the established millage rate for the UMSA budget
<u>Police Calls for Service</u>	The records of the County Police Department are examined and the calls for service within the boundaries of the proposed incorporation are identified. The tabulation of the number of calls for service represent the actual amount of activity in the study area.
<u>Cost Per Police Call</u>	The total budget for the UMSA service area is divided by the total amount of calls.
<u>Cost Per Lane Mile</u>	The total cost to maintain the roadways in the County is divided by the total amount of lane miles that exist.
<u>Number of Lane Miles</u>	The number of lane miles is obtained by measuring the length of all County roads located in the Study Area. The data is provided by the Public Works Department.

#### REVENUE LOSS TO UMSA

The first category of measurement is the amount of Revenue that is lost to UMSA due to the incorporation of the Study Area. Revenues are generated through application of Tax Rates and other levies to residential units and businesses. The method used in the Model makes an assumption that each potential incorporation area has similar characteristics to the entire unincorporated area. Although this assumption may not be entirely accurate, the development of a UMSA-wide standard is the most rational method to make the allocations of revenue.

#### Population Based Revenues

The process calls for an identification of the appropriate Revenue line item in the UMSA budget. This information is readily available to anyone performing the analysis (as well as all members of the public). The total Revenue amounts are then divided by the UMSA population estimates. Population estimates for the entire UMSA area are available each year from the Bureau of Economic and Business Research (BEER) at the University of Florida. This group is the official post-Census source of population estimates in the State of Florida. BEER is responsible for developing population estimates for all municipalities and unincorporated portions of counties as of April 1 of each year. This figure is the appropriate population estimate for the UMSA area.

The Revenue sources that are allocated using the budget amount divided by the UMSA population are:

- Franchise Fees
- Sales Tax (from the State allocation)
- Utility Taxes
- Communications Tax
- Alcoholic Beverage Tax
- Occupational License
- Fines and Forfeitures
- Interest
- Miscellaneous Revenues

#### Property Tax Revenue

The other Revenue source that is included in the analysis is the amount generated through Ad Valorem Taxes on Real and Personal Property. This amount of revenue is calculated by multiplying the Taxable Value by the UMSA Millage Rate.

#### Items that have been omitted

One significant Revenue source has not been included in the current Model. The revenue received from State Shared Revenues has not been entered into the Model, in its present form. State Shared Revenues has often been misunderstood in its application. Unfortunately, most of the confusion is based on terminology. Most people use the term State Shared Revenues as a catchall that includes several different sources. In addition, the name is also often applied to one specific source of funds received by the State of Florida. There are four specific revenue sources received from the State:

1. Sales Tax Revenue      This source refers to ½ % of the State Sales Tax that is collected and held in a special fund in the State Treasury. This money is disbursed to all counties and municipalities based primarily on population.
2. State Shared Revenue      Another State fund that is distributed based on population. The source of these funds are General Revenues of the State. The amount placed in this fund each year is discretionary and determined by the Legislature
3. Alcoholic Beverage Tax      This revenue source is based on the amount of alcoholic beverages sold in the jurisdiction the previous year.
4. Communications Tax      This tax is applied to all telephonic and electronic communications including telephone, cell phone, cable and satellite television and internet service. The tax rate is

determined by the local governmental unit, but is collected by the State. The amount is then returned to the local jurisdiction.

Three of these items are currently included in the Model. The State Shared Revenue item is not included, at this time. During discussions with staff of the Office of Strategic Business Management, Incorporation and Annexation Division to explore this issue, the process was explained to be a reasonable estimate of the total Revenue and Expenses. These figures are based on an allocation, not actual figures. The Revenue estimates are designed to identify all major line items and may not necessarily be all-inclusive.

PMGA recognizes this approach and generally accepts that such an allocation is the most appropriate method of conducting the analysis. However, the State Shared Revenue line item is also a significant revenue source. The total figure is easy to identify and the allocation should be performed in the same manner as the 1/2 Cent Sales Tax Revenues from the State of Florida. The inclusion of the State Shared Revenue item will make the analysis more accurate.

#### REDUCTION IN EXPENSES TO UMSA

In keeping with the current process, an allocation of the costs as expressed in the UMSA budget should also occur. These costs are those readily identifiable and allocated to the Study Area. The source of data for the expenditure items is the UMSA budget and the application is proportional to the amount of service provided to the area.

The expense items are:

- |                                   |   |
|-----------------------------------|---|
| <u>Police Department</u>          | Based on the number of calls in the Study Area. The number of calls is multiplied by the Cost per Police Call identified earlier. |
| <u>Parks and Recreation</u>       | Based on the budget for the local parks found in the Study Area.  |
| <u>Public Works</u>               | Based on the number of lane miles that exist in the Study Area, multiplied by the Cost Per Lane Mile identified earlier.          |
| <u>Planning, Team Metro, etc.</u> | A percentage of the Total Direct Cost (Police, Parks and Recreation and Public Works)   |
| <u>QNIP (Debt)</u>                | A percentage of the Total Direct Cost (Police, Parks and Recreation and Public Works)   |
| <u>Policy Formation/Support</u>   | A percentage of the Total Direct Cost (Police, Parks and Recreation and Public Works)   |

## NET IMPACT TO UMSA

The completion of the analysis is a determination of the Net Impact to UMSA from the proposed incorporation. This Net Impact is derived by subtracting the Expenses from the Revenues for the Study Area.

### Budget Gain

A Budget Gain is generated when the Revenues are higher than the Expenses. Under this scenario, the Study Area is a recipient community meaning that it takes more funds for UMSA to serve the area than it collects in Taxes and Fees. Under such a scenario, there is a fiscal benefit to UMSA.

### Budget Loss

Under this scenario, the Revenue exceed the Expenses indicating that it takes less to serve the area than it generates in Revenue. The Study Area would then be considered a donor community. This scenario generates a fiscal detriment to UMSA.

## RECOMMENDED CHANGES TO THE MODEL

The Consultant recommends two changes to the current Estimated Revenues and Expenses Impact to UMSA Model. One of these changes is easy to accomplish and will require little additional effort. The other recommendation is more significant in nature and effort.

1. **Add State Shared Revenues to the Revenue Loss calculations.** This change will require adding an additional line to the analysis. These calculations have been included on another set of calculations and adding them to the Model will be a minor effort.
2. **Change the Population Estimates from the Census to use of the GIS system to calculate modifications in the population over the years.** The nature of the Census does not allow for the measurement of growth in a community. The changes in population that occur throughout Miami-Dade County could be significant in some of the areas under consideration. As the Census data grows older, it becomes less reliable.

The method used in obtaining the population data must be constant throughout the County and must be reliable. Population change is directly proportional to the addition or subtraction of housing units. As new dwelling units are added, the number of people in the area increases. The best method to monitor this change is to determine the number of dwelling units added. This can be accomplished by employing the GIS system in the County. Building permits and Certificates of Occupancy are identified by specific geographic location. Each permit is entered into the system as they are issued. If the GIS Department is provided with boundaries, they can identify the number of permits issued in that area. This information can be applied to determine the change in population in

that area from the 2000 Census. The information is all internal to Miami-Dade County (no outside vendors are required).

With such a system, staff of the Planning and Zoning Department can add the new dwelling units to the Census figure to estimate a current population for the Study Area. The system will allow the estimates to more accurately reflect the population in the area. Since much of the Revenue projections are based on population, the results will be enhanced by this system.

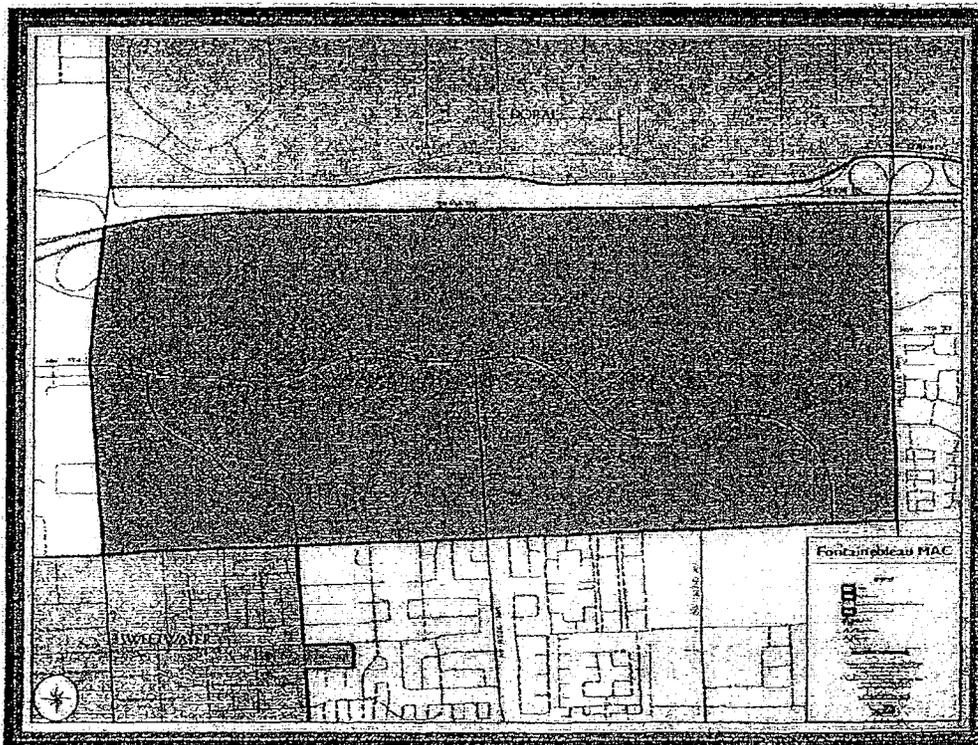
PMGA has discussed the matter with the GIS Department in Miami-Dade County who state that they will be able to accommodate the change. The Department already has a staff person assigned to the Management and Budget Office and can coordinate all efforts. It is not known, at this time, any additional costs, if any that may apply.

#### Impacts of the Changes

The changes recommended here will have the effect of increasing the Revenue estimates for the Model. The inclusion of the State Shared Revenues will provide an additional source. The change in population estimates will increase the number used to make Revenue estimates. This overall impact is likely not significant. However, the increased accuracy will provide a more appropriate analysis of the impacts of the proposed incorporation.

# REVIEW OF INCORPORATION ANALYSIS FONTAINEBLEAU AREA

DECEMBER 2005



Prepared by: PMG Associates, Inc.

**REVIEW OF INCORPORATION ANALYSIS  
FONTAINEBLEAU AREA**

PMG Associates, Inc. (PMGA) has been retained by Miami-Dade County to conduct a review of the analysis of potential incorporation for the area known as Fontainebleau located in west-central Miami-Dade County. The area is the following boundaries: (map is included in Exhibit 1.

North	State Road 836 Expressway
East	87 Avenue
South	Flagler Street
West	107 Avenue

**PURPOSE OF ANALYSIS**

Miami-Dade County has developed a process to accept and review petitions from the general public to establish new municipalities in the County. The proposals reflect the general wishes of citizens located in the area to analyze the potential incorporation. Under the Miami-Dade County Charter, analysis is performed by staff in the form of an Impact to UMSA Statement that measures the impact on the UMSA budget. Additionally, each study area is represented by a Municipal Advisory Committee (MAC) which is comprised of residents of the area under consideration. This group prepares an operating pro forma budget for the new municipality.

The expansion of this process was the inclusion of an independent third party review of the previous work to insure impartiality in the analysis. This third party consultant review has recently been added as a result of Resolution No, R-130-05 of the Board of County Commissioners.

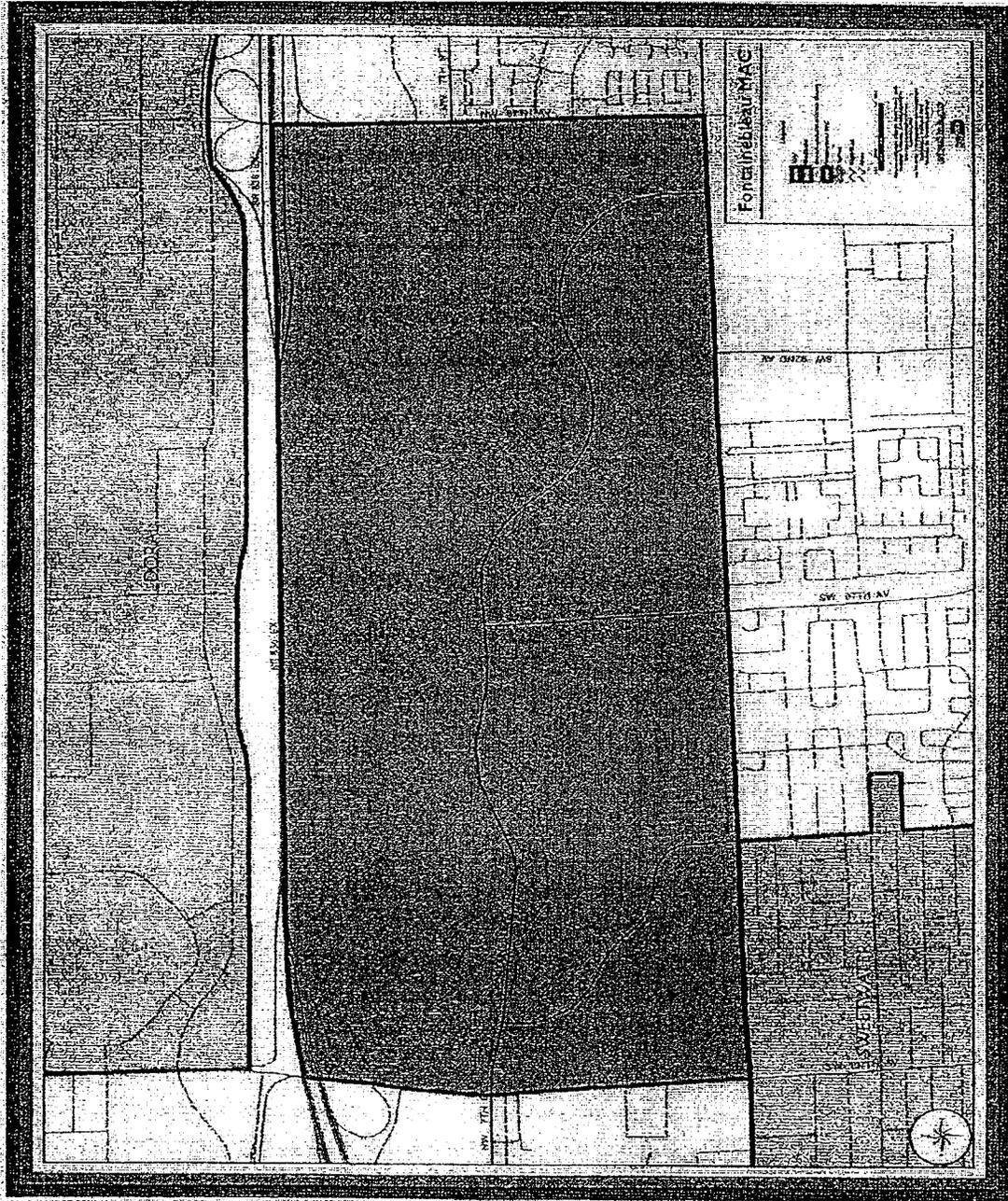
This report is a result of that third party review.

**IMPACT TO UMSA MODEL**

The current consultant for the incorporation analysis has also previously conducted a review of the Model used to calculate the Impact to the UMSA Budget for potential incorporations. As a result of that analysis, two changes were recommended for the Model. One of the changes added a Revenue source, while the other addresses a change in the method of estimating population for the Study Area. For this analysis, the Revenue section will be presented with both the older method and the recommended method. The population estimate will not change significantly, if at all, from the figure used when this analysis was originally conducted. The change in the population estimation method should be used for all future analyses.

The results of the Impact Analyses are found in Exhibits 2 and 3.

EXHIBIT 1  
LOCATION MAP



**EXHIBIT 2  
ORIGINAL IMPACT ANALYSIS**

*Fontainebleau MAC  
Estimated Impact on UMSA Budget Revenues and Expenses*

<b>Fontainebleau Based on FY 02-03 Budget</b>	<b>Assumptions</b>	
<b>2002 Taxable Property Rolls</b>		\$606,193,761
<b>2000 Census Population</b>		25,448
<b>2002-03 UMSA Millage</b>		2.447
<b>Police Calls for Service for 2002</b>		9,593
<b>Cost per Police Call</b>		\$200
<b>Cost per Lane Mile</b>		\$1,380
<b>Number of Lane Miles</b>		29.44
<b>Per Capita Taxable Value</b>		\$19,891
<b>Gross Revenue Loss to UMSA</b>		
<b>Property Tax Revenue</b>	<i>Allocation based on tax roll &amp; millage</i>	\$1,177,000
<b>Franchise Fees</b>	<i>Allocation based on tax roll/population</i>	\$434,000
<b>Sales Tax</b>	<i>Allocation based on \$59 per person</i>	\$1,493,000
<b>Utility Taxes</b>	<i>Allocation based on tax roll/population</i>	\$1,111,000
<b>Communications Tax</b>	<i>Allocated based on tax roll/population</i>	\$906,000
<b>Alcoholic Beverage License</b>	<i>Allocation based on \$0.21 per person</i>	\$5,000
<b>Occupational License</b>	<i>Allocation based on \$3.17 per person</i>	\$81,000
<b>Fines and Forfeitures</b>	<i>Allocation based on \$6.57 per person</i>	\$167,000
<b>Interest</b>	<i>Allocation based on .53% of all revenues</i>	\$29,000
<b>Miscellaneous Revenues</b>	<i>Allocation based on \$0.80 per person</i>	\$20,000
<b>Gross Revenue to UMSA</b>		\$5,423,000
<b>Cost of Providing UMSA Services</b>		
<b>Police Department</b>	<i>Based on police calls</i>	
	Local Patrol	\$1,401,912
	Specialized & Other	\$615,888
<b>Parks and Recreation Dept</b>	<i>Based on cost of parks</i>	\$180,371
<b>Public Works</b>		
	Lane Road Miles	
	Lane miles times cost per lane mile	\$40,627
<b>Planning, Team Metro and others</b>	<i>Direct cost times 9.3%</i>	\$198,908
<b>QNIP (Debt and pay-as-you-go)</b>	<i>Direct cost times 11.7%</i>	\$250,239
<b>Policy Formulation/Interest Support</b>	<i>Direct cost times 5.3%</i>	\$113,956
<b>Cost of Providing UMSA Services</b>		\$2,701,302
<b>Net Budget Loss to UMSA</b>		\$2,721,698
<b>Revised: August 7, 2003</b>		
<b>Assumptions:</b>		
1. Does not include gas tax funded projects		
2. Does not include canal maintenance revenues or expenses		
3. Does not include proprietary activities: Building, Zoning, Solid Waste		
4. Does not include Fire and Library Districts		
5. Revenues are based on allocations not actuals.		

UMSA Policy Analysis and Services Planning Unit  
August 7, 2003

**EXHIBIT 3  
REVISED IMPACT ANALYSIS**

**Fontainebleau MAC  
Estimated Impact on UMSA Budget Revenues and Expenses**

<b>Fontainebleau Based on FY 02-03 Budget</b>	<b>Assumptions</b>	
<b>2002 Taxable Property Rolls</b>		\$506,193,761
<b>2000 Census Population</b>		25,448
<b>2002-03 UMSA Millage</b>		2.447
<b>Police Calls for Service for 2002</b>		9,599
<b>Cost per Police Call</b>		\$200
<b>Cost per Lane Mile</b>		\$1,380
<b>Number of Lane Miles</b>		29.44
<b>Per Capita Taxable Value</b>		\$19,891
<b>Gross Revenue Loss to UMSA</b>		
<b>State Shared Revenue</b>	<i>Allocation based on \$29 per person</i>	\$738,000
<b>Property Tax Revenue</b>	<i>Allocation based on tax roll &amp; millage</i>	\$1,177,000
<b>Franchise Fees</b>	<i>Allocation based on tax roll/population</i>	\$434,000
<b>Sales Tax</b>	<i>Allocation based on \$59 per person</i>	\$1,493,000
<b>Utility Taxes</b>	<i>Allocation based on tax roll/population</i>	\$1,111,000
<b>Communications Tax</b>	<i>Allocated based on tax roll/population</i>	\$906,000
<b>Alcoholic Beverage License</b>	<i>Allocation based on \$0.21 per person</i>	\$5,000
<b>Occupational License</b>	<i>Allocation based on \$3.17 per person</i>	\$81,000
<b>Fines and Forfeitures</b>	<i>Allocation based on \$6.57 per person</i>	\$167,000
<b>Interest</b>	<i>Allocation based on .53% of all revenues</i>	\$29,000
<b>Miscellaneous Revenues</b>	<i>Allocation based on \$0.80 per person</i>	\$20,000
<b>Gross Revenue to UMSA</b>		\$6,161,000
<b>Cost of Providing UMSA Services</b>		
<b>Police Department</b>	<i>Based on police calls</i>	
	<i>Local Patrol</i>	\$1,401,912
	<i>Specialized &amp; Other</i>	\$515,888
<b>Parks and Recreation Dept</b>	<i>Based on cost of parks</i>	\$180,371
<b>Public Works</b>		
	<i>Lane Road Miles Lane miles times cost per lane mile</i>	\$40,627
<b>Planning, Team Metro and others</b>	<i>Direct cost times 9.3%</i>	\$198,909
<b>QPIP (Debt and pay-as-you-go)</b>	<i>Direct cost times 11.7%</i>	\$250,239
<b>Policy Formulation/Internal Support</b>	<i>Direct cost times 5.3%</i>	\$113,356
<b>Cost of Providing UMSA Services</b>		\$2,701,302
<b>Net Budget Loss to UMSA</b>		\$3,459,698
<b>Revised December 15, 2005</b>		
<b>Assumptions:</b>		
1. Does not include gas tax funded projects.		
2. Does not include canal maintenance revenues or expenses.		
3. Does not include proprietary activities: Building, Zoning, Solid Waste.		
4. Does not include Fire and Library Districts.		
5. Revenues are based on allocations not actuals.		

### Results of the Analysis

The Impact Model developed for the review of the potential incorporation activity was prepared for the Fontainebleau area. Based on the results found in Exhibits 2 and 3, it is clear that the area is a "Donor Community", where the Revenue generated exceeds the Expenses required to provide service to the community. In the original version of the Model, the Revenues generated were 2 times the Expenses. In the revised version, the ratio increases to 2.28 times Expenses.

Fontainebleau is a "Donor Community" which contributes a substantial amount more in Revenue to the UMSA budget than the services received. Incorporation for this community will give the residents an opportunity to close the gap between taxes paid and services received.

The impact on UMSA would be significant, in that a net loss of Revenue will occur (over \$2.7 million in the original Model and nearly \$3.5 million in the revised Model).

### **PRO FORMA BUDGET**

Several versions of a potential municipal budget were produced for review by the MAC. One known as the "MAC Working Budget" was compiled with input from staff from Miami-Dade County. The second version is referred to as a "Break-Even Budget" which reduced some costs if the Working Budget generated a deficit.

One major assumption in the analysis was that the new municipality would continue to levy a millage rate equal to the current UMSA rate. This assumption is appropriate since many residents may only wish to incorporate if taxes do not go up. Retaining the millage rate at the current UMSA levy would be the most reasonable approach.

### Analysis of Budget Data

PMGA conducted a separate review of the Budget amount for the Fontainebleau area. This review consisted of a review of the Pro Forma amounts, research into the basis for the staffing and other cost estimates and review of budgets of other municipalities of similar size.

The analysis concentrated on the four principal functions. This analysis should not be interpreted to indicate that the other municipal functions are not important. Instead, these functions were selected since they are more open to interpretation, especially when discussing the Level of Service. Many functions, such as Administration, Finance, etc. do not have a great deal of flexibility. In addition, the functions chosen for examination also typically provide the greatest cost. The four functions are:

- Police
- Planning, Building and Zoning
- Parks and Recreation
- Public Works

### Working Budget

The Working Budget for the Fontainebleau MAC was determined to generate a deficit with Revenue of \$6,052,106 and Expenditures of \$8,355,027. The deficit of \$2,302,921 represents over 27% of the Expense projections.

The largest of the Expense items is Police with a total of \$4,165,983 or nearly 50% of the entire budget. This figure is significantly higher than the \$1,917,800 which is the estimate of UMSA expenses based on the number of calls received. Members of the MAC expressed concern over this cost estimate feeling that the figure was too high (discussed in a later section of this report). If the cost estimate for Police was reduced to the level as indicated on the UMSA Impact Analysis, the budget would be in balance.

Based on the Working Budget, one of two actions must be taken:

1. Reduce the Police Expense amount by approximately \$2.3 million
2. Increase the Ad Valorem Rate to 7.1628

### Comparison with other Communities

PMGA conducted a review of municipalities from across the State of Florida as well as those located in Miami-Dade County. Municipalities were selected with a population similar to Fontainebleau (plus or minus 10%) and the budgets reviewed. Only budgets from the same fiscal year as those used in the Fontainebleau Working Budget were analyzed. The four functions identified earlier were selected for more in depth analysis. The municipalities considered for comparison to Fontainebleau are:

- Apopka
- Aventura
- Key West
- Ocoee
- Oviedo
- Winter Haven
- Winter Park

Some of the municipalities were discarded (such as Key West) due to the unique nature of that community. The results were that the budget for Fontainebleau was comparable to most of these communities. The costs for Police were typically lower in Fontainebleau than the other municipalities. This is likely due to the fact that the other communities have stand alone Police Departments and the amount of senior staff is greater. The estimate of 33 sworn officers for the community results in a ratio of 1.3 officers per one thousand population, which is slightly under the national standard of 2 per one thousand population.

In Parks and Recreation, the costs are also less. The reason for this lower figure is that the area only has one park. The rest of the open space is a County park and a golf course. The municipality would not have to maintain these facilities.

Due to the fact that Fontainebleau is already built-out, the efforts of the Planning, Building and Zoning will also be less than other communities.

The budget for Public Works appears to be significantly low for the municipality of this size. The figures are approximately one-fourth of the budgets for other communities. The reason is that the County will retain control of the canal maintenance until the municipality wishes to take on this function themselves, if ever. Also Gas Tax funded projects have not been included. Eliminating the drainage and roadway maintenance functions will significantly reduce the costs.

The overall budget for the community is generally within acceptable limits, based on the review. However, the budget cannot be balanced at the higher (\$4.1 million) figure for the Police Department.

#### **CONTACTS WITH FONTAINEBLEAU MAC INDIVIDUALS:**

Members of the Fontainebleau Municipal Advisory Committee were contacted to discuss their confidence in the budget prepared for the potential incorporation of the area or any other point regarding incorporation. Interviews were conducted since it was very difficult to attempt to organize a special meeting. The interviews also allowed the members to discuss their issues without influence from other parties.

Members felt that the budget and level of service submitted in 2002 was unrealistic. The police levels of 33 sworn officers were much too high for a 2 mile by 1 mile area as compared the level of service that is currently available. The crime rate was described as "low". Committee members felt that they are a "donor" community especially since the Taxable Values have gone up since the study. It was expressed that the study is way out of date and out of line.

Specific concerns that were expressed regarded current flooding problems after rain and future anticipated worse flooding with the development of the golf course to a residential area. Traffic and lighting deficits were also mentioned.

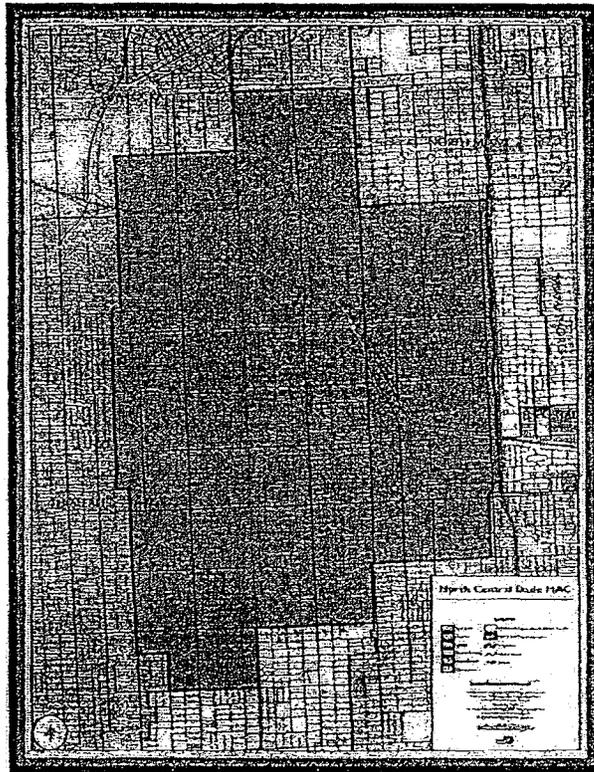
#### **SUMMARY**

The budget as currently estimated does not permit a viable municipality. The Police budget line item must be reduced significantly. The other option of increasing the millage rate is not considered viable.

One potential means to balance the budget in the long-run is through the development of the golf course property. As this area builds, building permits will be collected that will generate more revenue. Although the building permit revenue will be short-lived, it will be replaced by higher Property Tax Revenues. The exact benefits of this scenario cannot be estimated until a development plan is prepared. However, the future development of the golf course could make the incorporation far more advantageous to the residents.

# REVIEW OF INCORPORATION ANALYSIS NORTH CENTRAL AREA

DECEMBER 2005



Prepared by: PMG Associates, Inc.

**REVIEW OF INCORPORATION ANALYSIS  
NORTH CENTRAL AREA**

PMG Associates, Inc. (PMGA) has been retained by Miami-Dade County to conduct a review of the analysis of potential incorporation for the area known as the North Central area located in the central portion of Miami-Dade County. The area is the following boundaries: (map is included in Exhibit 1.

North	Cities of Opa Locka and North Miami
East	I-95
South	NW 82 Street and NW 54 Street
West	City of Hialeah

**PURPOSE OF ANALYSIS**

Miami-Dade County has developed a process to accept and review petitions from the general public to establish new municipalities in the County. The proposals reflect the general wishes of citizens located in the area to analyze the potential incorporation. Under the Miami-Dade County Charter, analysis is performed by staff in the form of an Impact to UMSA Statement that measures the impact on the UMSA budget. Additionally, each study area is represented by a Municipal Advisory Committee (MAC) which is comprised of residents of the area under consideration. This group prepares an operating pro forma budget for the new municipality.

The expansion of this process was the inclusion of an independent third party review of the previous work to insure impartiality in the analysis. This third party consultant review has recently been added as a result of Resolution No, R-130-05 of the Board of County Commissioners.

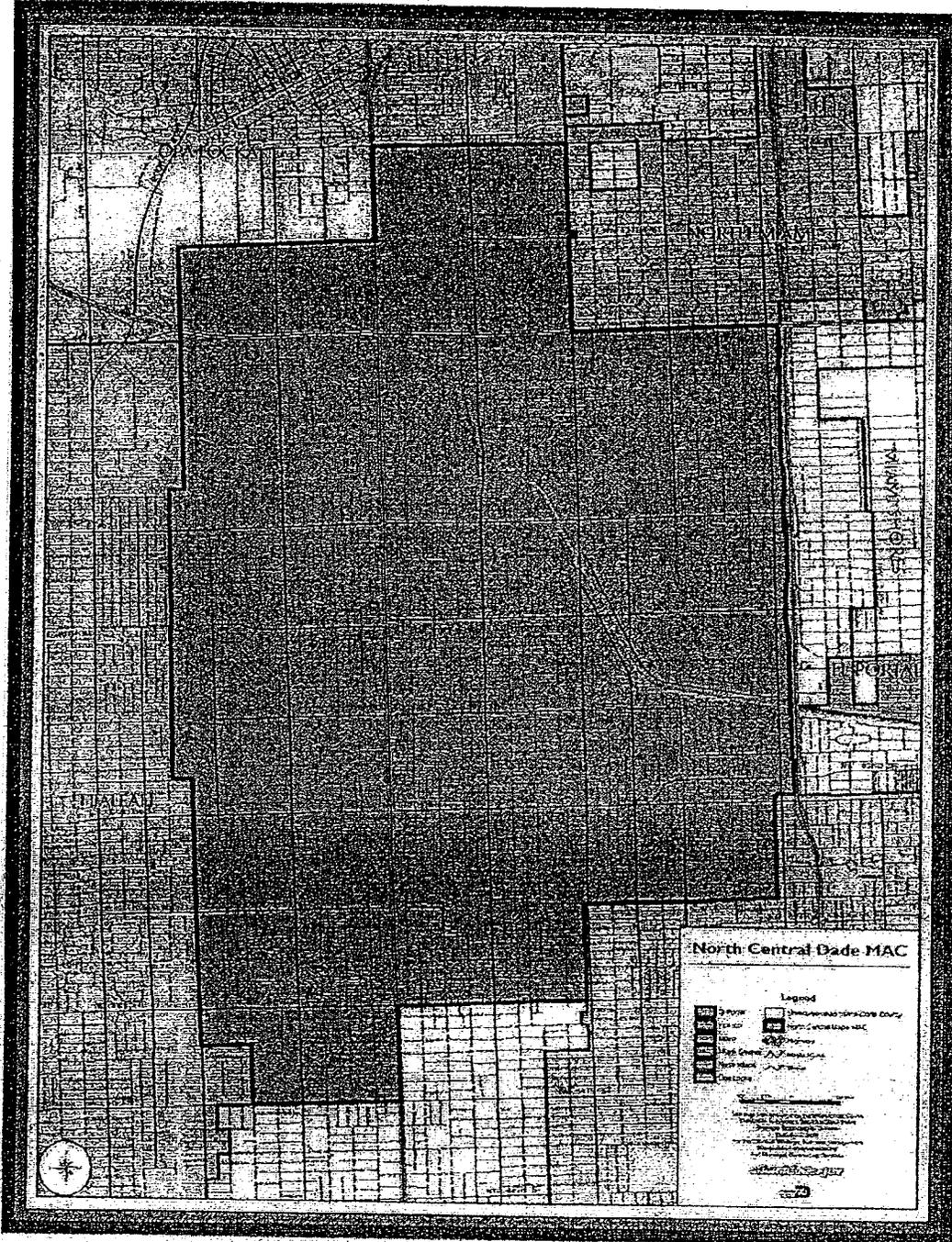
This report is a result of that third party review.

**IMPACT TO UMSA MODEL**

The current consultant for the incorporation analysis has also previously conducted a review of the Model used to calculate the Impact to the UMSA Budget for potential incorporations. As a result of that analysis, two changes were recommended for the Model. One of the changes added a Revenue source, while the other addresses a change in the method of estimating population for the Study Area. For this analysis, the Revenue section will be presented with both the older method and the recommended method. The population estimate will not change significantly, if at all, from the figure used when this analysis was originally conducted. The change in the population estimation method should be used for all future analyses.

The results of the Impact Analyses are found in Exhibits 2 and 3.

EXHIBIT I  
LOCATION MAP



**EXHIBIT 2  
ORIGINAL IMPACT ANALYSIS**

*N. Central Dade Estimated Revenues and Expense Impact to the UMSA Budget* **DRAFT**

<b>Based on FY 02-03 Budget North Central Dade</b>	<b>Assumptions</b>	
<b>2002 Taxable Property Rolls</b>		\$1,283,848,750
<b>2000 Census Population</b>		73,106
<b>2002-03 UMSA Millage</b>		2.447
<b>Police Calls for Service for 2002</b>		327,410
<b>Cost per Police Call</b>		\$200
<b>Cost per Lane Mile</b>		\$1,389
<b>Number of Lane Miles</b>		374.88
<b>Per Capita Taxable Value</b>		\$17,562
<b>Gross Revenue Loss to UMSA</b>		
<b>Property Tax Revenue</b>	<i>Allocation based on tax roll &amp; millage</i>	\$2,984,000
<b>Franchise Fees</b>	<i>Allocation based on tax roll/population</i>	\$1,199,000
<b>Sales Tax</b>	<i>Allocation based on \$59 per person</i>	\$4,290,000
<b>Utility Taxes</b>	<i>Allocation based on tax roll/population</i>	\$3,070,000
<b>Communications Tax</b>	<i>Allocated based on tax roll/population</i>	\$2,504,000
<b>Alcoholic Beverage License</b>	<i>Allocation based on \$0.21 per person</i>	\$15,000
<b>Occupational License</b>	<i>Allocation based on \$3.17 per person</i>	\$232,000
<b>Fines and Forfeitures</b>	<i>Allocation based on \$6.57 per person</i>	\$480,000
<b>Interest</b>	<i>Allocation based on 53% of all revenues</i>	\$79,000
<b>Miscellaneous Revenues</b>	<i>Allocation based on \$0.80 per person</i>	\$58,000
<b>Gross Revenue to UMSA</b>		\$14,912,000
<b>Cost of Providing UMSA Services</b>		
<b>Police Department</b>	<i>Based on police calls</i>	
	<i>Local Patrol</i>	\$18,627,342
	<i>Specialized &amp; Other</i>	\$6,854,658
<b>Parks and Recreation Dept</b>	<i>Based on cost of parks</i>	\$2,233,316
<b>Public Works</b>	<i>Lane Road Miles Lane miles times cost per lane mile</i>	\$517,307
<b>Planning, Team Metro and others</b>	<i>Direct cost times 93%</i>	\$2,625,634
<b>GNIP (Debt and pay-as-you-go)</b>	<i>Direct cost times 11.7%</i>	\$3,303,217
<b>Policy Formulation/Internal Support</b>	<i>Direct cost times 5.3%</i>	\$1,496,329
<b>Cost of Providing UMSA Services</b>		\$35,657,803
<b>Net Budget Loss / (Gain) to UMSA</b>		(\$20,745,803)
<b>Revised 2/9/05</b>		
<b>Assumptions:</b>		
1. Does not include gas tax funded projects		
2. Does not include canal maintenance revenues or expenses		
3. Does not include proprietary activities: Building, Zoning, Solid Waste		
4. Does not include Fire and Library Districts		
5. Revenues are based on allocations not actuals		

**EXHIBIT 3  
REVISED IMPACT ANALYSIS**

<b>Based on FY 02-03 Budget North Central Dade</b>	<b>Assumptions</b>	
<b>2002 Taxable Property Rolls</b>		\$1,283,648,750
<b>2000 Census Population</b>		73,105
<b>2002-03 UMSA Millage</b>		2.447
<b>Police Calls for Service for 2002</b>		127,410
<b>Cost per Police Call</b>		\$200
<b>Cost per Lane Mile</b>		\$1,380
<b>Number of Lane Miles</b>		374.86
<b>Per Capita Taxable Value</b>		\$17,562
<b>Gross Revenue Loss to UMSA</b>		
<b>State Shared Revenue</b>	Allocation based on \$29 per person	\$2,120,000
<b>Property Tax Revenue</b>	Allocation based on tax roll 3-millage	\$2,984,000
<b>Franchise Fees</b>	Allocation based on tax roll/population	\$1,199,000
<b>Sales Tax</b>	Allocation based on \$59 per person	\$4,290,000
<b>Utility Taxes</b>	Allocation based on tax roll/population	\$3,070,000
<b>Communications Tax</b>	Allocated based on tax roll/population	\$2,504,000
<b>Alcoholic Beverage License</b>	Allocation based on \$0.21 per person	\$15,000
<b>Occupational License</b>	Allocation based on \$3.17 per person	\$232,000
<b>Fines and Forfeitures</b>	Allocation based on \$6.57 per person	\$480,000
<b>Interest</b>	Allocation based on 53% of all revenues	\$79,000
<b>Miscellaneous Revenues</b>	Allocation based on \$0.80 per person	\$59,000
<b>Gross Revenue to UMSA</b>		\$17,032,000
<b>Cost of Providing UMSA Services</b>		
<b>Police Department</b>	Based on police calls	
	Local Patrol	\$18,627,342
	Specialized & Other	\$6,854,658
<b>Parks and Recreation Dept</b>	Based on cost of parks	\$2,233,316
<b>Public Works</b>	Lane Road Miles Lane miles times cost per lane mile	\$517,307
<b>Planning, Team Metro and others</b>	Direct cost times 9.3%	\$2,625,634
<b>GNIP (Debt and pay-as-you-go)</b>	Direct cost times 11.7%	\$3,303,217
<b>Policy Formulation/Internal Support</b>	Direct cost times 5.3%	\$1,496,329
<b>Cost of Providing UMSA Services</b>		\$35,657,803
<b>Net Budget Loss / (Gain) to UMSA</b>		(\$18,625,803)
<b>Revised 2/9/05</b>		
<b>Assumptions:</b>		
1. Does not include gas tax funded projects		
2. Does not include canal maintenance revenues or expenses		
3. Does not include proprietary activities: Building, Zoning, Solid Waste		
4. Does not include Fire and Library Districts		
5. Revenues are based on allocations not actuals		

### Results of the Analysis

The Impact Model developed for the review of the potential incorporation activity was prepared for the North Central area. Based on the results found in Exhibits 2 and 3, it is clear that the area is a "Recipient Community", where the Revenue generated is less than the Expenses required to provide service to the community. In the original version of the Model, the Expenses required to serve the area were 2.39 times the Revenues. In the revised version, the ratio decreases to 2.09 times Revenues.

North Central is a "Recipient Community" which requires a substantial amount more in services from the UMSA budget than the Revenues generated. Incorporation for this community will require the residents to pay a higher portion of the cost to provide service.

The impact on UMSA would be significant, in that a net Budget loss of over \$20.7 million in the original Model and over \$18.6 million in the revised Model. A Budget loss means that the UMSA budget would have a net reduction in Expenses.

### **PRO FORMA BUDGET**

Several versions of a potential municipal budget were produced for review by the MAC. One known as the "MAC Working Budget" was compiled with input from staff from Miami-Dade County. The second version is referred to as a "Break-Even Budget" which reduced some costs if the Working Budget generated a deficit.

One major assumption in the analysis was that the new municipality would continue to levy a millage rate equal to the current UMSA rate. This assumption is appropriate since many residents may only wish to incorporate if taxes do not go up. Retaining the millage rate at the current UMSA levy would be the most reasonable approach.

### Analysis of Budget Data

PMGA conducted a separate review of the Budget amount for the North Central area. This review consisted of a review of the Pro Forma amounts, research into the basis for the staffing and other cost estimates and review of budgets of other municipalities of similar size.

The analysis concentrated on the four principal functions. This analysis should not be interpreted to indicate that the other municipal functions are not important. Instead, these functions were selected since they are more open to interpretation, especially when discussing the Level of Service. Many functions, such as Administration, Finance, etc. do not have a great deal of flexibility. In addition, the functions chosen for examination also typically provide the greatest cost. The four functions are:

- Police
- Planning, Building and Zoning

- Parks and Recreation
- Public Works

### Working Budget

The Working Budget for the North Central MAC was determined to generate a deficit with Expenses of \$22,510,209 and Revenues of \$17,539,769. The deficit of \$4,539,440 represents over 20% of the Expense projections.

The largest of the Expense items is Police with a total of \$16,704,339 or over 74% of the entire budget. This figure is significantly lower than the \$25,482,000 which is the estimate of UMSA expenses based on the number of calls received. Members of the MAC expressed concern over this cost estimate feeling that the figure was too high (discussed in a later section of this report). A Break Even Budget was produced that reduced the Police expense to \$12,164,899 to generate a balance.

Based on the Working Budget, one of two actions must be taken:

1. Reduce the Police Expense amount by approximately \$4.5 million
2. Increase the Ad Valorem Rate to 6.1321

### Comparison with other Communities

PMGA conducted a review of municipalities from across the State of Florida as well as those located in Miami-Dade County. Municipalities were selected with a population similar to North Central (plus or minus 10%) and the budgets reviewed. Only budgets from the same fiscal year as those used in the North Central Working Budget were analyzed. The four functions identified earlier were selected for more in depth analysis. The municipalities considered for comparison to North Central are:

- Boca Raton
- Davie
- Deltona
- Lakeland
- Largo
- Melbourne
- Miramar
- Palm Bay
- Pompano Beach

Some of the municipalities were discarded (such as Boca Raton) due to the unique nature of that community. The results were that the budget for North Central was comparable to most of these communities. The costs for Police were typically lower in North Central than the other municipalities. This is likely due to the fact that the other communities have stand alone Police Departments and the amount of senior staff is greater. The estimate of 146 sworn officers for the

community results in a ratio of 2.0 officers per one thousand population, which is equal to the national standard.

In Parks and Recreation, the costs are also less than the other communities. Although there are 21 parks in the boundary of North Central, the budget amount exactly equals the existing budgets of these facilities. Additionally, there are two County parks in the area. The municipality would not have to maintain these facilities.

The budget amount for Planning, Building and Zoning is also less than the comparison communities. The amount is approximately one-fourth of the budgets for these locations. Although there will not be significant growth, redevelopment and code enforcement could be required. The budget for this department may require additional funding.

The budget for Public Works appears to be significantly low for the municipality of this size. The figures are approximately one-fourth of the budgets for other communities. The reason is that the County will retain control of the canal maintenance until the municipality wishes to take on this function themselves, if ever. Also Gas Tax funded projects have not been included. Eliminating the drainage and roadway maintenance functions will significantly reduce the costs.

The overall budget for the community is generally within acceptable limits, based on the review. However, the budget cannot be balanced at the higher (\$16.7 million) figure for the Police Department.

#### CONTACTS WITH NORTH CENTRAL MAC INDIVIDUALS:

Members of the North Central Municipal Advisory Committee were contacted to discuss their confidence in the budget prepared for the potential incorporation of the area or any other point regarding incorporation. Interviews were conducted since it was very difficult to attempt to organize a special meeting. The interviews also allowed the members to discuss their issues without influence from other parties.

The committee members contacted indicated some concerns. The Police portion of the budget was a concern voiced by the members. Members indicated that they were not given any leeway for negotiation of the financial amounts or personnel numbers. Also mentioned was that not enough information was given as back-up regarding the figures/numbers that they were given. It was conveyed to PMGA that members felt a number was given for these service that reflected the level of service and resources being provided at that time from existing precincts and with existing equipment and staffing. One member believed this was unrealistic and that services would not have been appropriate at existing levels from existing facilities should a new city be created. Another member was particularly uncomfortable with the cited cost of the service to the potential city of 73,000 persons would have been very similar to that provided to Miami Gardens, a city of over 100,000.

Another item that a member indicated caused some trepidation was revenue projections. It was felt that revenue projections, specifically State Shared Revenues were low and that this needed to be revisited to see if more revenue would be available.

## OTHER FACTORS

A portion of the North Central area is currently under study by the Miami-Dade Office of Community and Economic Development for consideration as a CRA. A Finding of Necessity is currently under review. This report is a precursor to the formation of a CRA. Under the provisions of the CRA legislation, a County formed CRA cannot operate within municipal limits. If the CRA is created, this will pose a problem legislatively for the municipality. Additionally, a CRA would limit the expansion of the tax base while Tax Increment Financing (TIF) is applied. If the area incorporates, the County may be required to disband the CRA. If the municipality does decide to keep the CRA, additional interlocal agreements are required. The TIF amount will restrict the growth of the General Fund Revenues for the time frame that the TIF is in place. In the long-run, the CRA could help revenues by assisting in the increase in property values.

## SUMMARY

The budget as currently estimated does not permit a viable municipality. The Police budget line item must be reduced significantly. The other option of increasing the millage rate is not considered viable.

The issue of the CRA must also be settled prior to the establishment of the new municipality.



**REVIEW OF INCORPORATION ANALYSIS  
NORTHEAST AREA**

PMG Associates, Inc. (PMGA) has been retained by Miami-Dade County to conduct a review of the analysis of potential incorporation for the area known as Northeast located in the northern portion of Miami-Dade County. The area is the following boundaries: (map is included in Exhibit 1.

North	County line
East	City of Aventura
South	City of North Miami Beach
West	I-95

**PURPOSE OF ANALYSIS**

Miami-Dade County has developed a process to accept and review petitions from the general public to establish new municipalities in the County. The proposals reflect the general wishes of citizens located in the area to analyze the potential incorporation. Under the Miami-Dade County Charter, analysis is performed by staff in the form of an Impact to UMSA Statement that measures the impact on the UMSA budget. Additionally, each study area is represented by a Municipal Advisory Committee (MAC) which is comprised of residents of the area under consideration. This group prepares an operating pro forma budget for the new municipality.

The expansion of this process was the inclusion of an independent third party review of the previous work to insure impartiality in the analysis. This third party consultant review has recently been added as a result of Resolution No, R-130-05 of the Board of County Commissioners.

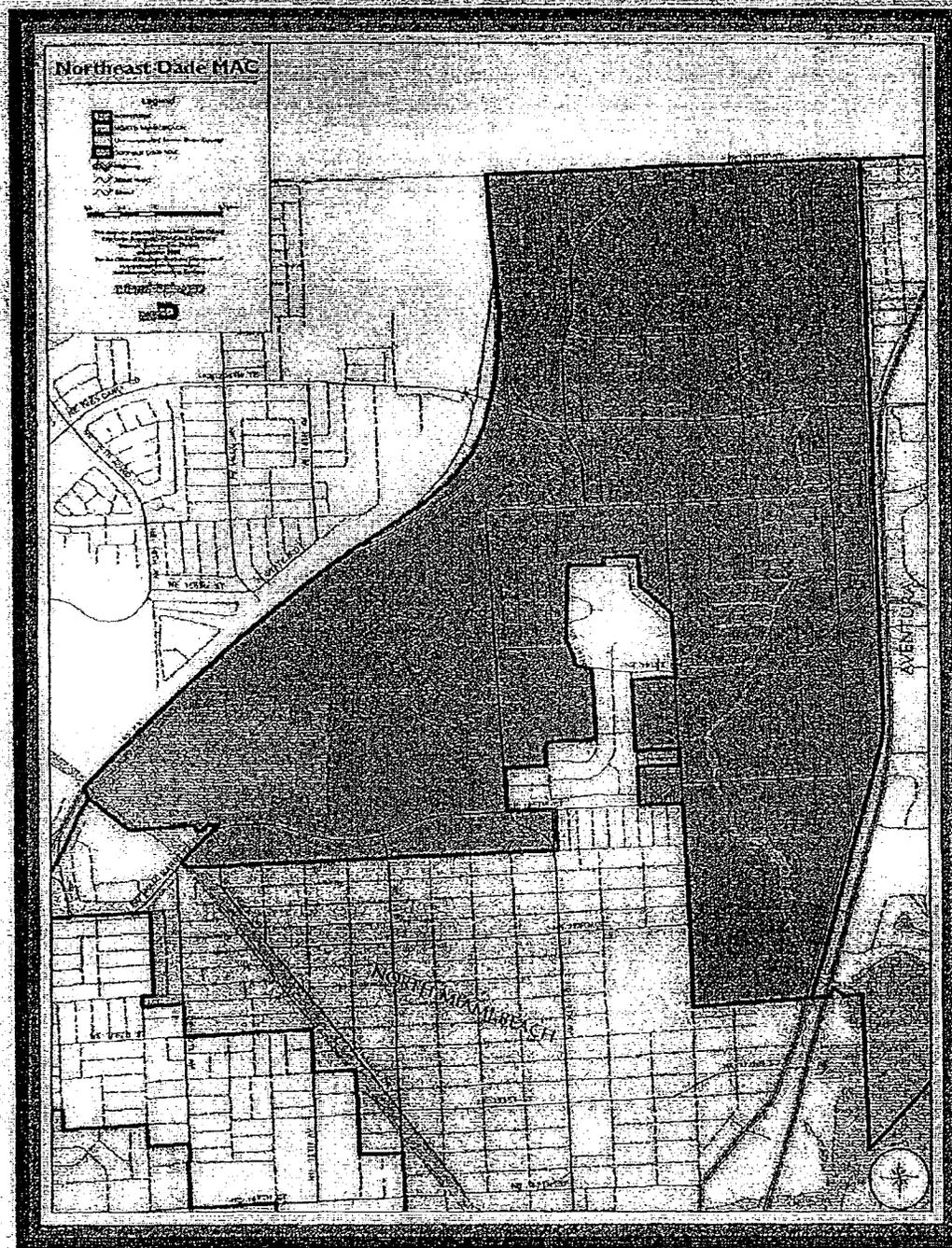
This report is a result of that third party review.

**IMPACT TO UMSA MODEL**

The current consultant for the incorporation analysis has also previously conducted a review of the Model used to calculate the Impact to the UMSA Budget for potential incorporations. As a result of that analysis, two changes were recommended for the Model. One of the changes added a Revenue source, while the other addresses a change in the method of estimating population for the Study Area. For this analysis, the Revenue section will be presented with both the older method and the recommended method. The population estimate will not change significantly, if at all, from the figure used when this analysis was originally conducted. The change in the population estimation method should be used for all future analyses.

The results of the Impact Analyses are found in Exhibits 2 and 3.

EXHIBIT 1  
LOCATION MAP



**EXHIBIT 2  
ORIGINAL IMPACT ANALYSIS**

**Northwest MAC Estimated Revenues and Expenses  
Impact to UMSA Budget**

As of October 2004

Based on FY 03-04 Budget	Assumptions	
<b>2003 Taxable Property Rolls</b>		\$826,297,669
<b>2000 Census Population</b>		16,738
<b>2003-04 UMSA Millage</b>		2.447
<b>Police Calls for Service for 2003</b>		12,956
<b>Cost per Police Call</b>		\$248
<b>Cost per Lane Mile</b>		\$1,123
<b>Number of Lane Miles</b>		81,22
<b>Per Capita Taxable Value</b>		\$49,378
<b>Gross Revenue/Loss to UMSA</b>		
<b>Property Tax Revenue</b>	Allocation based on tax roll & millage	\$1,921,000
<b>Franchise Fees</b>	Allocation based on tax roll population	\$529,000
<b>Sales Tax</b>	Allocation based on \$59 per person	\$832,000
<b>Utility Taxes</b>	Allocation based on tax roll population	\$1,046,000
<b>Communications Tax</b>	Allocated based on tax roll population	\$842,000
<b>Alcoholic Beverage License</b>	Allocation based on \$0.21 per person	\$84,000
<b>Occupational License</b>	Allocation based on \$3.11 per person	\$64,000
<b>Fines and Forfeitures</b>	Allocation based on \$6.51 per person	\$88,000
<b>Interest</b>	Allocation based on .53% of all revenues	\$26,000
<b>Miscellaneous Revenues</b>	Allocation based on \$0.84 per person	\$14,000
<b>Gross Revenue to UMSA</b>		\$5,358,000
<b>Cost of Providing UMSA Services -</b>		
<b>Police Department</b>	Based on police calls	
	Local Patrol	\$2,349,218
	Specialized & Other	\$864,466
<b>Parks and Recreation Dept</b>	Based on cost of parks	\$245,087
<b>Public Works</b>		
	Lane Road Miles	Lane miles times cost per lane mile
		568,750
<b>Planning, Team Meet and others</b>	Direct cost times 93%	\$328,081
<b>ONIP (Debt and pay-as-you-go)</b>	Utility Taxes as a % of debt service 13%	\$135,980
<b>Police Foundation/ Internal Support</b>	Direct cost times 7.5%	\$264,566
<b>Cost of Providing UMSA Services</b>		\$4,256,148
<b>Net Budget Loss to UMSA</b>		\$1,101,852
	10/31/2004	
<b>Assumptions:</b>		
1. Does not include gas tax funded projects		
2. Does not include canal maintenance revenues or expenses		
3. Does not include proprietary activities: Building, Zoning, Solid Waste		
4. Does not include Fire and Library Districts		
5. Revenues are based on allocations not actuals		
6. Police Services are based on calls, not what the cost would be for a full service dept. for the area		

**EXHIBIT 3  
REVISED IMPACT ANALYSIS**

Based on FY 03-04 Budget	Assumptions	
<b>2003 Taxable Property Rolls</b>		\$226,397,969
<b>2000 Census Population</b>		16,736
<b>2003-04 UMSA Millage</b>		2.447
<b>Police Calls for Service for 2003</b>		12,956
<b>Cost per Police Call</b>		\$248
<b>Cost per Lane Mile</b>		\$1,123
<b>Number of Lane Miles</b>		61.22
<b>Per Capita Taxable Value</b>		\$49,378
<b>Gross Revenue Loss to UMSA</b>		
<b>State Shared Revenues</b>	Allocation based on \$29 per person	\$485,000
<b>Property Tax Revenue</b>	Allocation based on tax roll & millage	\$1,921,000
<b>Franchise Fees</b>	Allocation based on tax roll/population	\$529,000
<b>Sales Tax</b>	Allocation based on \$58 per person	\$832,000
<b>Utility Taxes</b>	Allocation based on tax roll/population	\$1,046,000
<b>Communications Tax</b>	Allocated based on tax roll/population	\$842,000
<b>Alcoholic Beverage License</b>	Allocation based on \$0.21 per person	\$4,000
<b>Occupational License</b>	Allocation based on \$3.11 per person	\$54,000
<b>Fines and Forfeitures</b>	Allocation based on \$6.51 per person	\$88,000
<b>Interest</b>	Allocation based on .53% of all revenues	\$28,000
<b>Miscellaneous Revenues</b>	Allocation based on \$0.80 per person	\$14,000
<b>Gross Revenue to UMSA</b>		\$5,843,000
<b>Cost of Providing UMSA Services</b>		
<b>Police Department</b>	Based on police calls	
	Local Patrol	\$2,349,218
	Specialized & Other	\$864,486
<b>Parks and Recreation Dept</b>	Based on cost of parks	\$245,087
<b>Public Works</b>		
	Lane Road Miles	Lane miles times cost per lane mile
		\$68,750
<b>Planning, Team Metro and others</b>	Direct cost times 9.3%	\$328,051
<b>QNP (Debt and pay-as-you-go)</b>	Utility Taxes as a % of debt service 13%	\$135,980
<b>Policy Formulation/Internal Support</b>	Direct cost times 7.5%	\$264,566
<b>Cost of Providing UMSA Services</b>		\$4,266,148
<b>Net Budget Loss to UMSA</b>		\$1,588,852
<b>Assumptions</b>		
1. Does not include gas tax funded projects		
2. Does not include canal maintenance revenues or expenses		
3. Does not include proprietary activities: Building, Zoning, Solid Waste		
4. Does not include Fire and Library Districts		
5. Revenues are based on allocations not actuals		
6. Police Services are based on calls, not what the cost would be for a full service dept. for the area		

### Results of the Analysis

The Impact Model developed for the review of the potential incorporation activity was prepared for the Northeast area. Based on the results found in Exhibits 2 and 3, it is clear that the area is a "Donor Community", where the Revenue generated exceeds the Expenses required to provide service to the community. In the original version of the Model, the Revenues generated were 1.26 times the Expenses. In the revised version, the ratio increases to 1.37 times Expenses.

Northeast is a "Donor Community" which contributes more in Revenue to the UMSA budget than the services received. Incorporation for this community will give the residents an opportunity to close the gap between taxes paid and services received.

The impact on UMSA would be significant, in that a net loss of Revenue will occur (over \$1.1 million in the original Model and nearly \$1.6 million in the revised Model).

### **PRO FORMA BUDGET**

Several versions of a potential municipal budget were produced for review by the MAC. One known as the "MAC Working Budget" was compiled with input from staff from Miami-Dade County. The second version is referred to as a "Break-Even Budget" which reduced some costs if the Working Budget generated a deficit.

One major assumption in the analysis was that the new municipality would continue to levy a millage rate equal to the current UMSA rate. This assumption is appropriate since many residents may only wish to incorporate if taxes do not go up. Retaining the millage rate at the current UMSA levy would be the most reasonable approach.

### Analysis of Budget Data

PMGA conducted a separate review of the Budget amount for the Northeast area. This review consisted of a review of the Pro Forma amounts, research into the basis for the staffing and other cost estimates and review of budgets of other municipalities of similar size.

The analysis concentrated on the four principal functions. This analysis should not be interpreted to indicate that the other municipal functions are not important. Instead, these functions were selected since they are more open to interpretation, especially when discussing the Level of Service. Many functions, such as Administration, Finance, etc. do not have a great deal of flexibility. In addition, the functions chosen for examination also typically provide the greatest cost. The four functions are:

- Police
- Planning, Building and Zoning
- Parks and Recreation
- Public Works

### Working Budget

The original Working Budget for the Northeast MAC was determined to generate a surplus with Revenue of \$5,358,000 and Expenditures of \$4,295,128. The surplus of \$1,062,872 represents nearly 25% of the Expense projections.

The largest of the Expense items is Police with a total of \$3,213,704 or nearly 75% of the entire budget. This figure is exactly the same as the figure from the UMSA Impact Analysis Model based on the number of calls received. Later, a modified budget was adopted that increased the Police spending to \$3,704,185 which closed the surplus amount.

### Comparison with other Communities

PMGA conducted a review of municipalities from across the State of Florida as well as those located in Miami-Dade County. Municipalities were selected with a population similar to Northeast (plus or minus 10%) and the budgets reviewed. Only budgets from the same fiscal year as those used in the Northeast Working Budget were analyzed. The four functions identified earlier were selected for more in depth analysis. The municipalities considered for comparison to Northeast are:

- Bartow
- Cocoa
- DeBary
- Leesburg
- New Port Richey
- Safety Harbor
- Sebaastian
- Sunny Isles Beach
- Venice
- Vero Beach

The results were that the budget for Northeast was comparable to most of these communities. The costs for Police were typically lower in Northeast than the other municipalities. This is likely due to the fact that the other communities have stand alone Police Departments and the amount of senior staff is greater. The estimate of 32 sworn officers for the community results in a ratio of 2.0 officers per one thousand population, which is equal to the national standard.

In Parks and Recreation, the costs are also less. The reason for this lower figure is that the area only has two parks. The rest of the open space is a Regional park The municipality would not have to maintain this facility.

Due to the fact that Northeast is already built-out, the efforts of the Planning, Building and Zoning will also be less than other communities.

The budget for Public Works appears to be significantly low for the municipality of this size. The figures are approximately one-fourth of the budgets for other communities. The reason is

that the County will retain control of the canal maintenance until the municipality wishes to take on this function themselves, if ever. Also Gas Tax funded projects have not been included. Eliminating the drainage and roadway maintenance functions will significantly reduce the costs.

The overall budget for the community is generally within acceptable limits, based on the review of other communities of the same size.

#### **CONTACTS WITH NORTHEAST MAC INDIVIDUALS:**

Members of the Northeast Municipal Advisory Committee were contacted to discuss their confidence in the budget prepared for the potential incorporation of the area or any other point regarding incorporation. Interviews were conducted since it was very difficult to attempt to organize a special meeting. The interviews also allowed the members to discuss their issues without influence from other parties.

The committee members contacted indicated that they were basically satisfied with the budget and the levels of services that were submitted. One member mentioned that some infrastructure improvements had been made after the "no name storm" of a few years ago, which helped the area. In the matter of the Police portion of the budget, there seemed to be a split between the members. While some felt the amounts were "too high" for the specialized and overall police numbers, there were some who felt that perhaps the police amounts were not adequate.

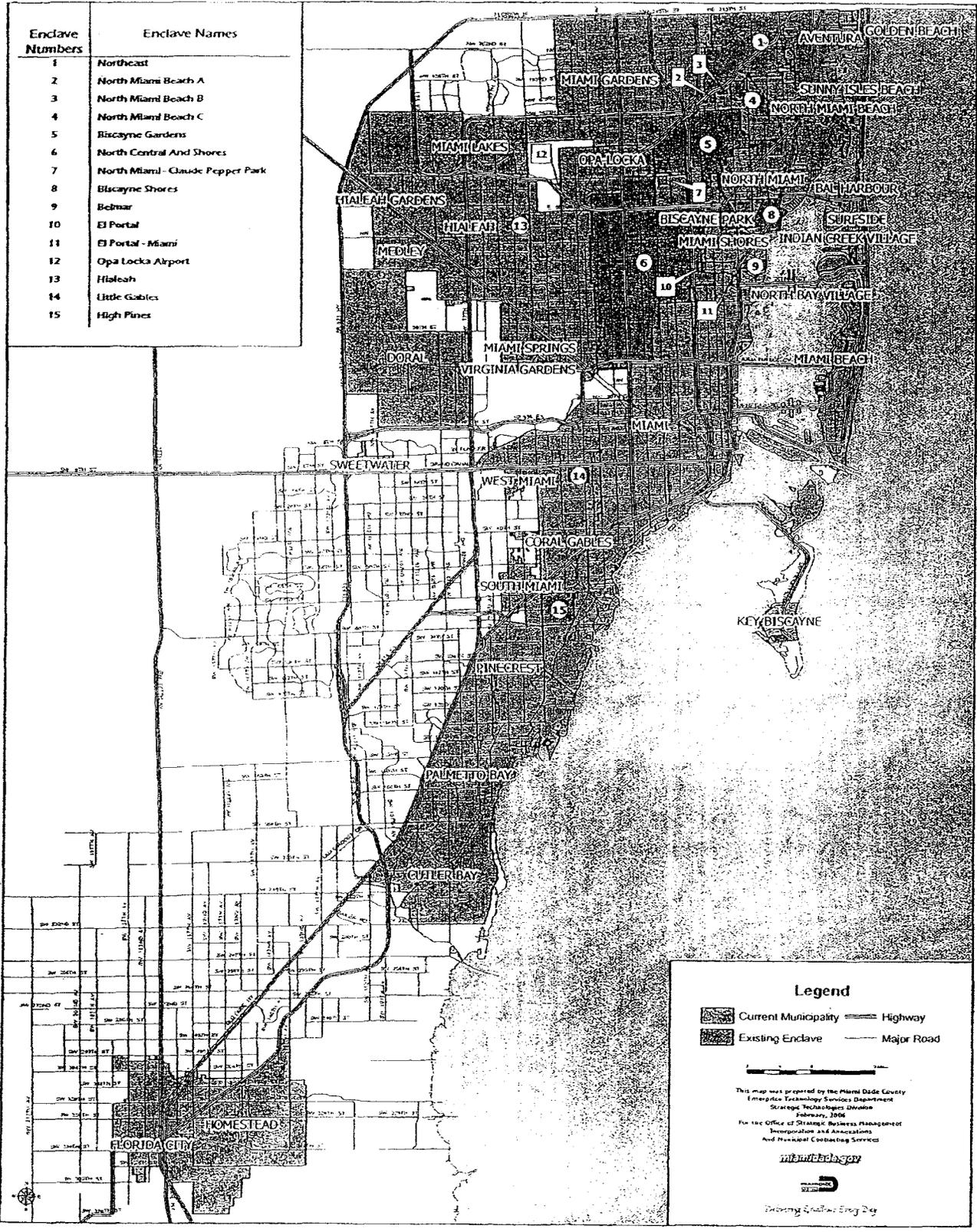
In the area of revenues, it was mentioned that the numbers were felt to be low.

#### **SUMMARY**

The analysis of the Northeast area reveals that a viable municipality could be developed. Revenues exceed Expenses and the level of service appears to meet the needs of the community.

### Miami-Dade County Existing Enclaves

Enclave Numbers	Enclave Names
1	Northeast
2	North Miami Beach A
3	North Miami Beach B
4	North Miami Beach C
5	Biscayne Gardens
6	North Central And Shores
7	North Miami - Claude Pepper Park
8	Biscayne Shores
9	Belmar
10	El Portal
11	El Portal - Miami
12	Opa Locka Airport
13	Hialeah
14	Little Gables
15	High Pines



**Legend**

Current Municipality
  Existing Enclave

Highway
  Major Road

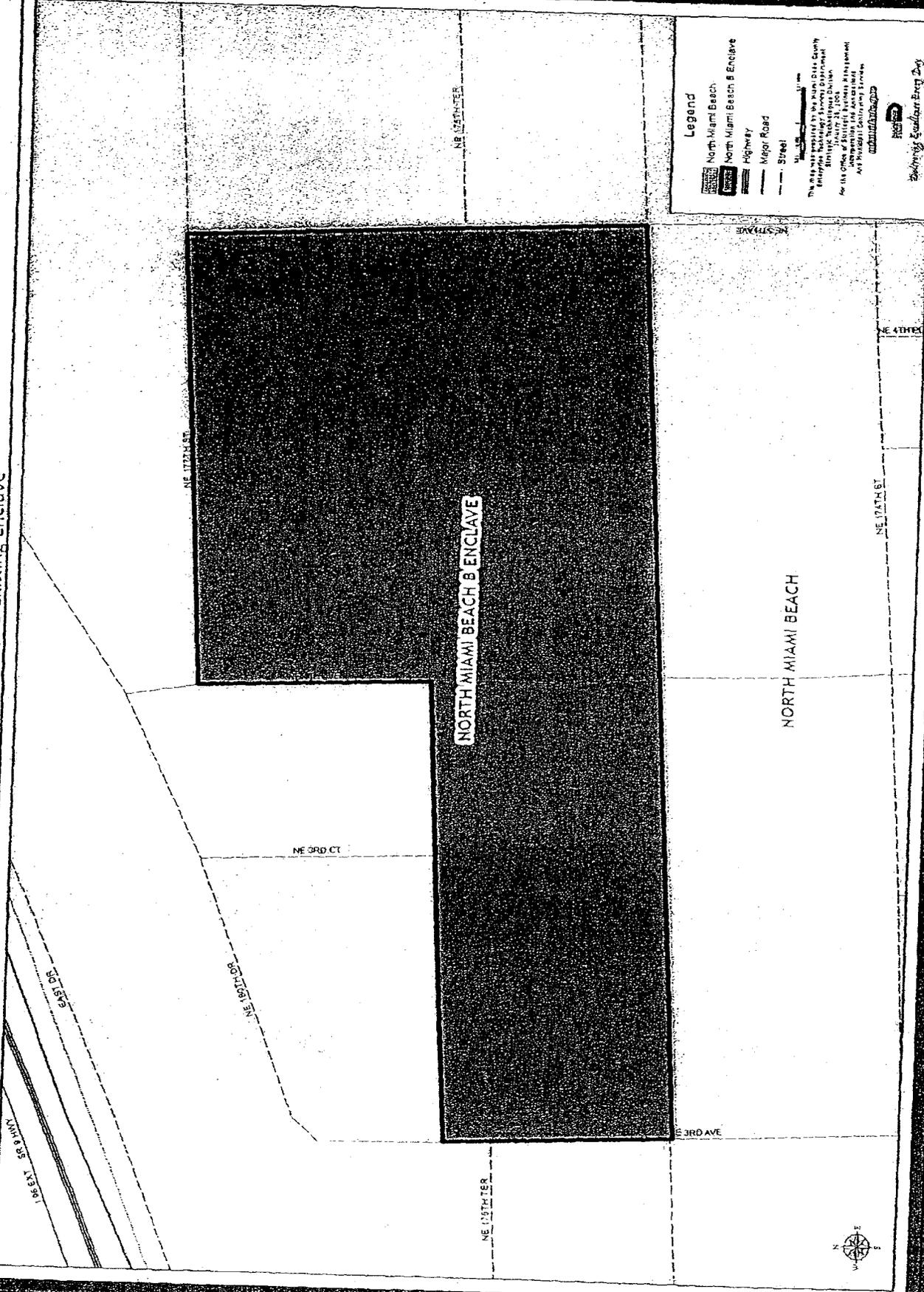
This map was prepared by the Miami Dade County  
 Enterprise Technology Services Department  
 Strategic Technologies Division  
 February, 2006  
 For the Office of Strategic Business Management  
 Transportation and Infrastructure  
 and Principal Consulting Services

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*Miami-Dade County*  
 North Miami Beach B Existing Enclave



**Legend**

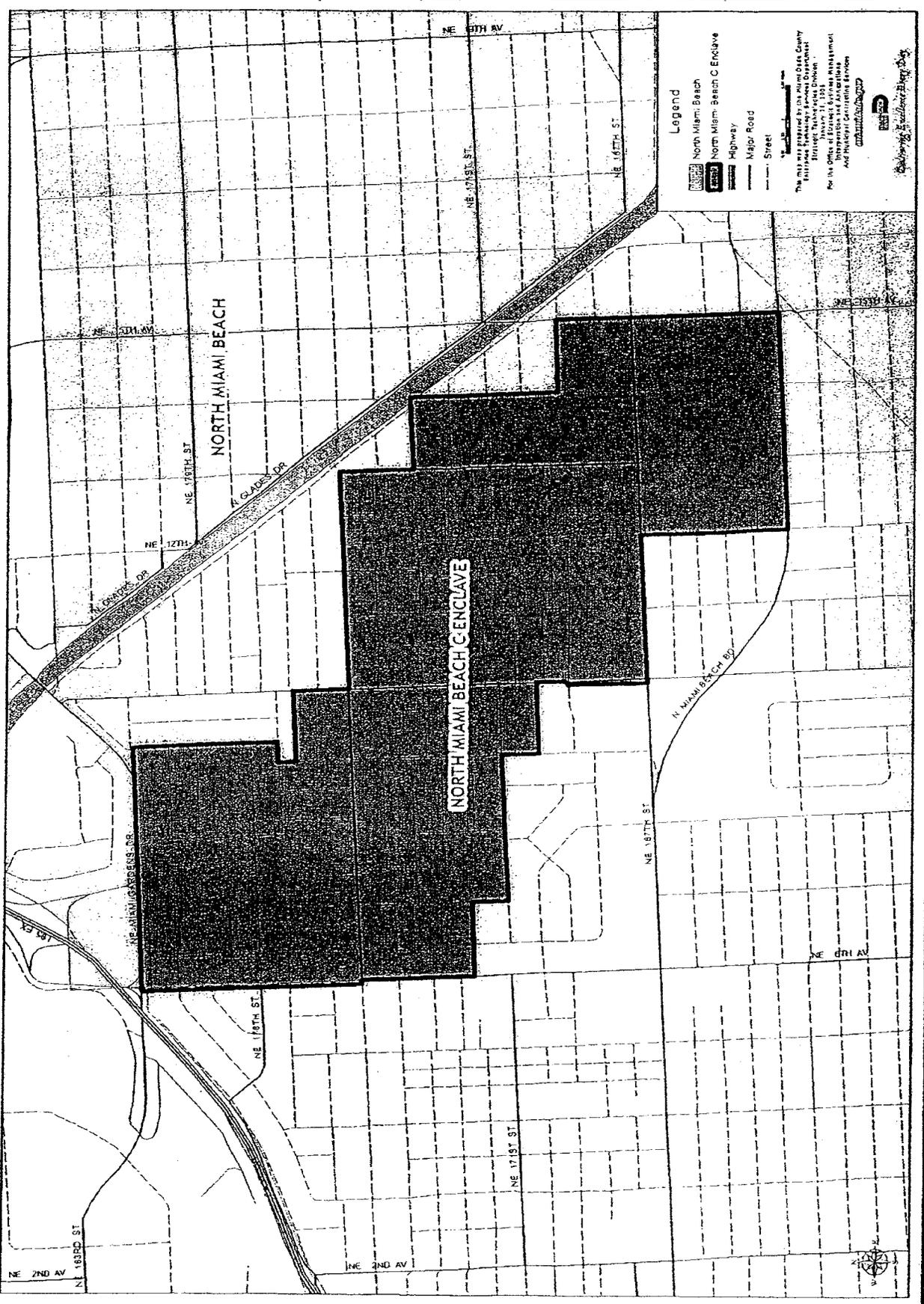
- North Miami Beach
- North Miami Beach B Enclave
- Highway
- Major Road
- Street

The Board of Public Works, Miami-Dade County  
 Planning, Building, & Community Development  
 Planning & Building Division  
 For the Office of Public Works Administration  
 Administration & Planning  
 1000 Biscayne Blvd., Miami, FL 33132

Engineering & Surveying Dept.



*Miami-Dade County*  
 North Miami Beach C Existing Enclave



**Legend**

- North Miami Beach
- North Miami Beach C Enclave
- Highway
- Major Road
- Street

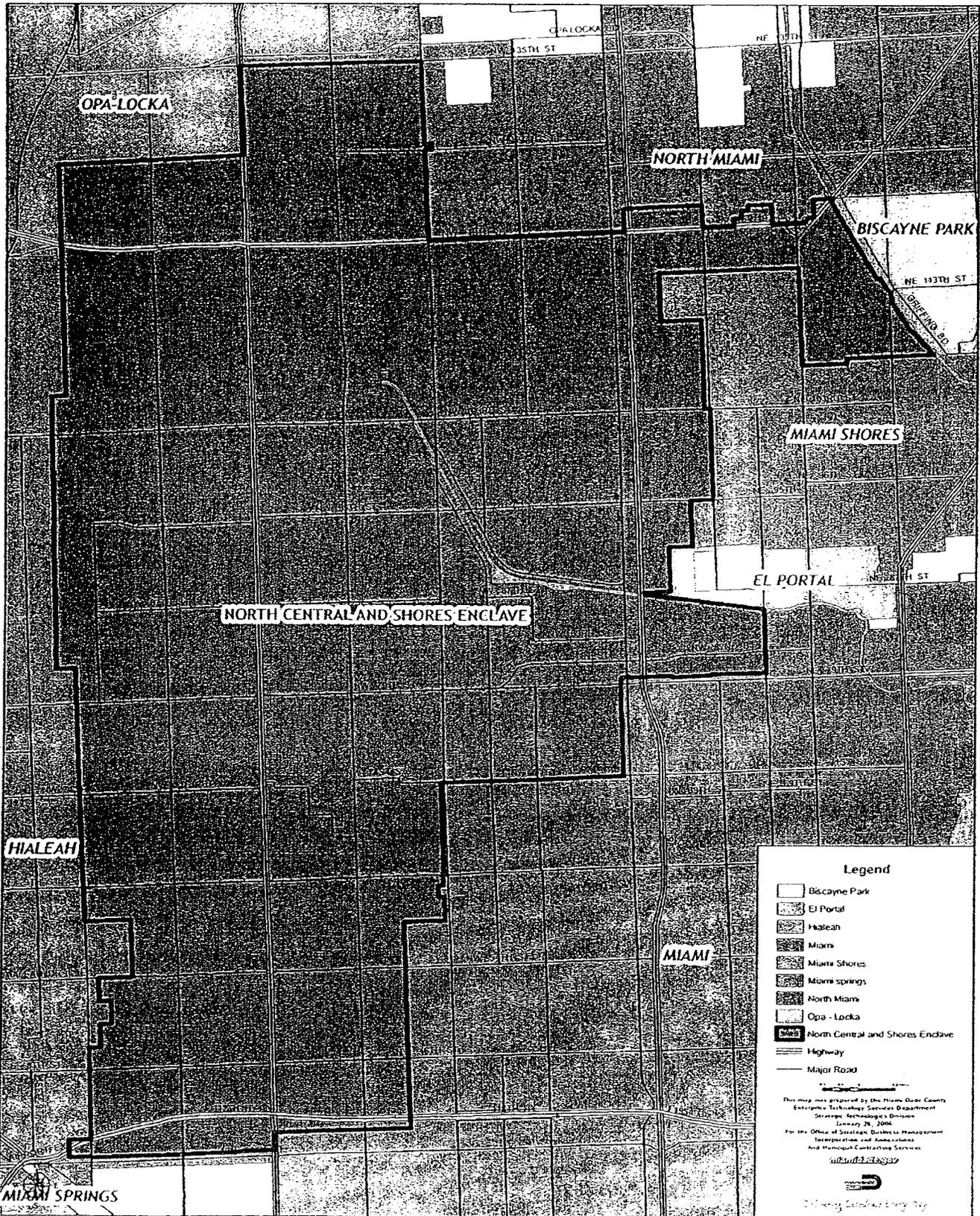
The map was prepared by the Miami-Dade County  
 Planning Technology Services Department  
 11000 NW 12th St., Suite 100  
 Miami, FL 33192  
 For the Office of Economic Development, Planning  
 and Public Works Administration  
 and Planning Commission

**PREPARED BY**  
 Planning Technology Services Department  
 Miami-Dade County



# Miami-Dade County

## North Central and Shores Existing Enclave



**Legend**

- Biscayne Park
- El Portal
- Hialeah
- Miami
- Miami Shores
- Miami Springs
- North Miami
- Opa-Locka
- North Central and Shores Enclave
- Highway
- Major Road

This map was prepared by the Miami-Dade County Enterprise Technology Services Department Strategic Technology Division January 28, 2008 For the Office of Strategic Business Management Incorporation and Announcements and Municipal Contracting Services

**suburban**

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Miami-Dade County  
North Miami - Claude Pepper Park Existing Enclave

OPALOCKA BLVD

NW 135TH ST

NW 134TH ST

NW 134TH ST

NW 133RD ST

NW 132ND ST

NORTH MIAMI - CLAUDE PEPPER PARK ENCLAVE

NW 131ST AVE

NORTH MIAMI

NW 131ST AVE

Legend

- North Miami
- North Miami - Claude Pepper Park Enclave
- Highway
- Major Road
- Street

This map was prepared by the Miami-Dade County  
Emergency Technology Services Department  
Geospatial Technologies Division  
January 26, 2006  
For the Office of Strategic Business Management  
Integration and Assessment  
And Municipal Contracting Services

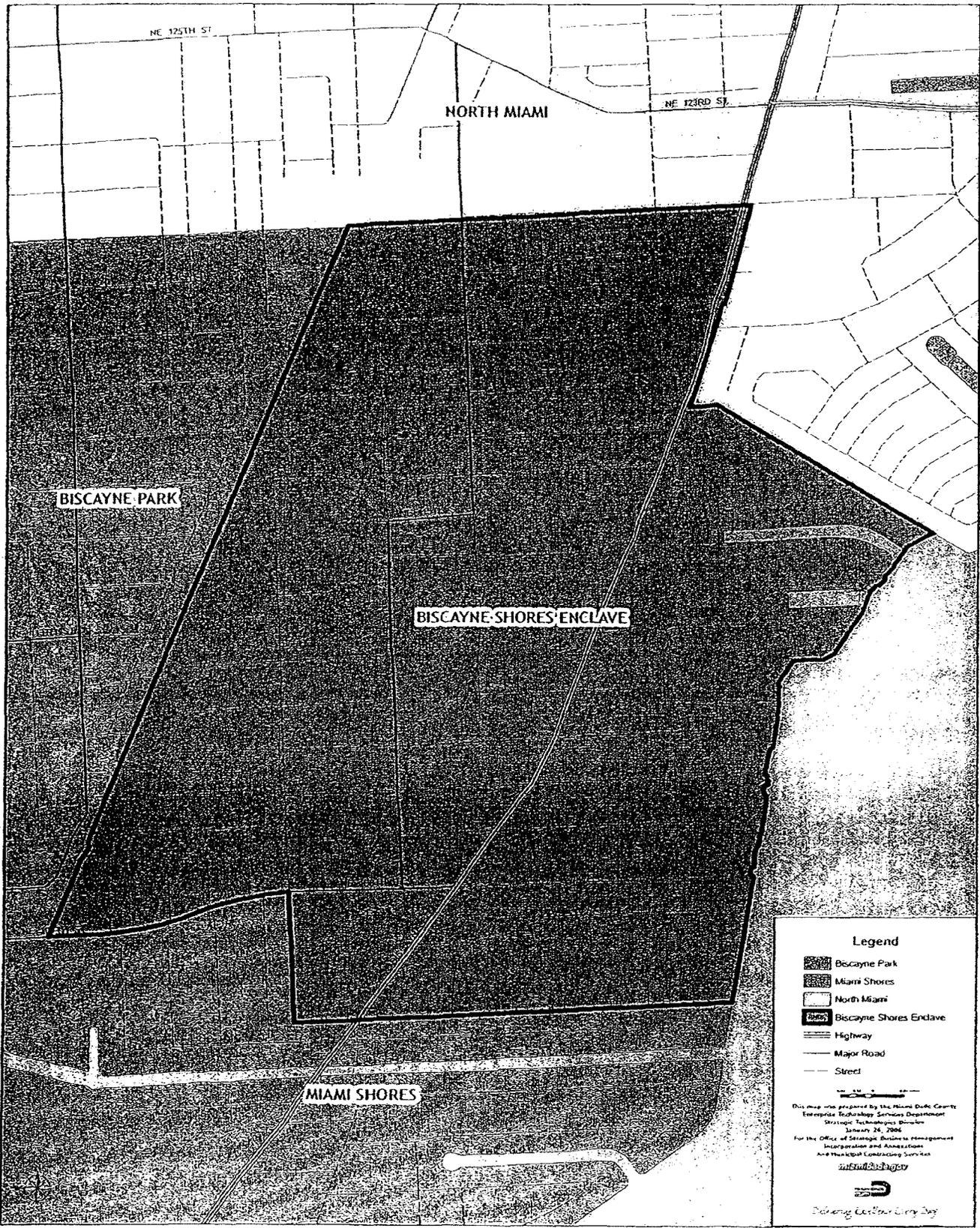
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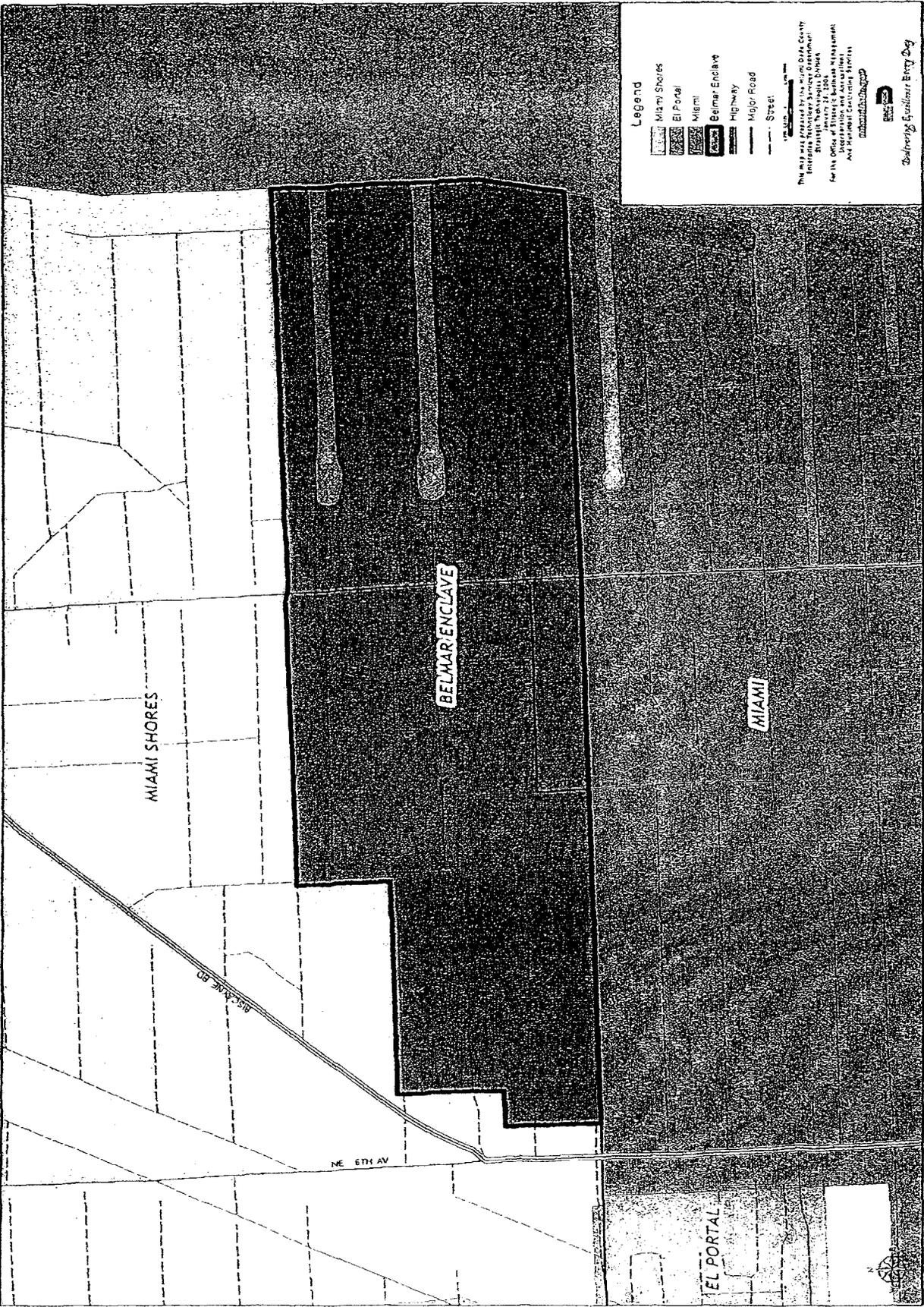
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*Miami-Dade County*  
Biscayne Shores Existing Enclave



*Miami-Dade County*  
Belmar Existing Enclave



**Legend**

- Miami Shores
- El Portal
- Miami
- Belmar Enclave
- Highway
- Major Road
- Street

The City of Miami-Dade County, Florida, Planning & Zoning Department, through the Office of Planning, Development and Administration, and the Office of Community Services.

**Belmar Existing Enclave**

Miami-Dade County  
El Portal - Horace Mann Existing Enclave

MIAMI SHORES

NW 92ND AVE

NW 90TH ST

NW 89TH ST

NW 88TH TER

NW 88TH ST

NW 87TH ST

NW 90TH ST

NW 89TH ST

NW 88TH ST

NW 87TH ST

EL PORTAL - HORACE MANN ENCLAVE

EL PORTAL

NW 86TH ST

Legend

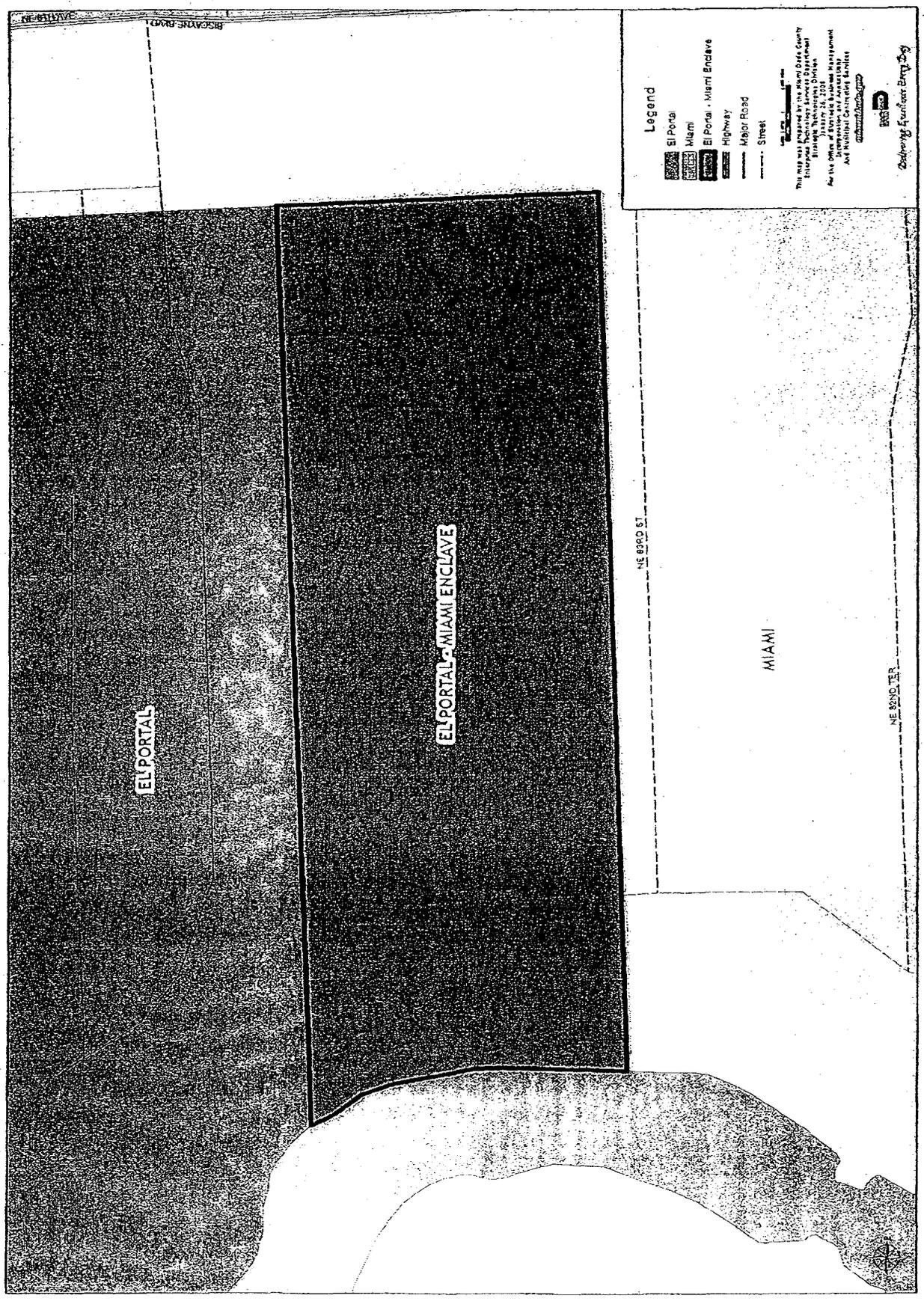
- El Portal
- Miami Shores
- El Portal - Horace Mann Enclave
- Highway
- Major Road
- Street

This map was prepared by the Miami-Dade County  
Enterprise Technology Services Department  
Strategic Technologies Division  
January 26, 2008  
For the Office of Strategic Business Management  
Inspection and Approvals  
And Municipal Contracting Services



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*Miami-Dade County*  
 El Portal - Miami Existing Enclave



Legend

- El Portal
  - Miami
  - El Portal - Miami Enclave
  - Highway
  - Major Road
  - Street
- This map was prepared by the Miami Dade County  
 Internal Technology Services Department  
 Planning Services Unit  
 on July 26, 2023  
 for the Office of Public Works Management  
 and Municipal Capital Expenditures

*Office of Public Works Management and Municipal Capital Expenditures*

Miami-Dade County  
Opa Locka Airport Existing Enclave

NW 133RD ST

OPA LOCKA AIRPORT ENCLAVE

OPA LOCKA

Legend

-  Opa - Locka
-  Opa Locka Airport Enclave
-  Highway
-  Major Road
-  Street

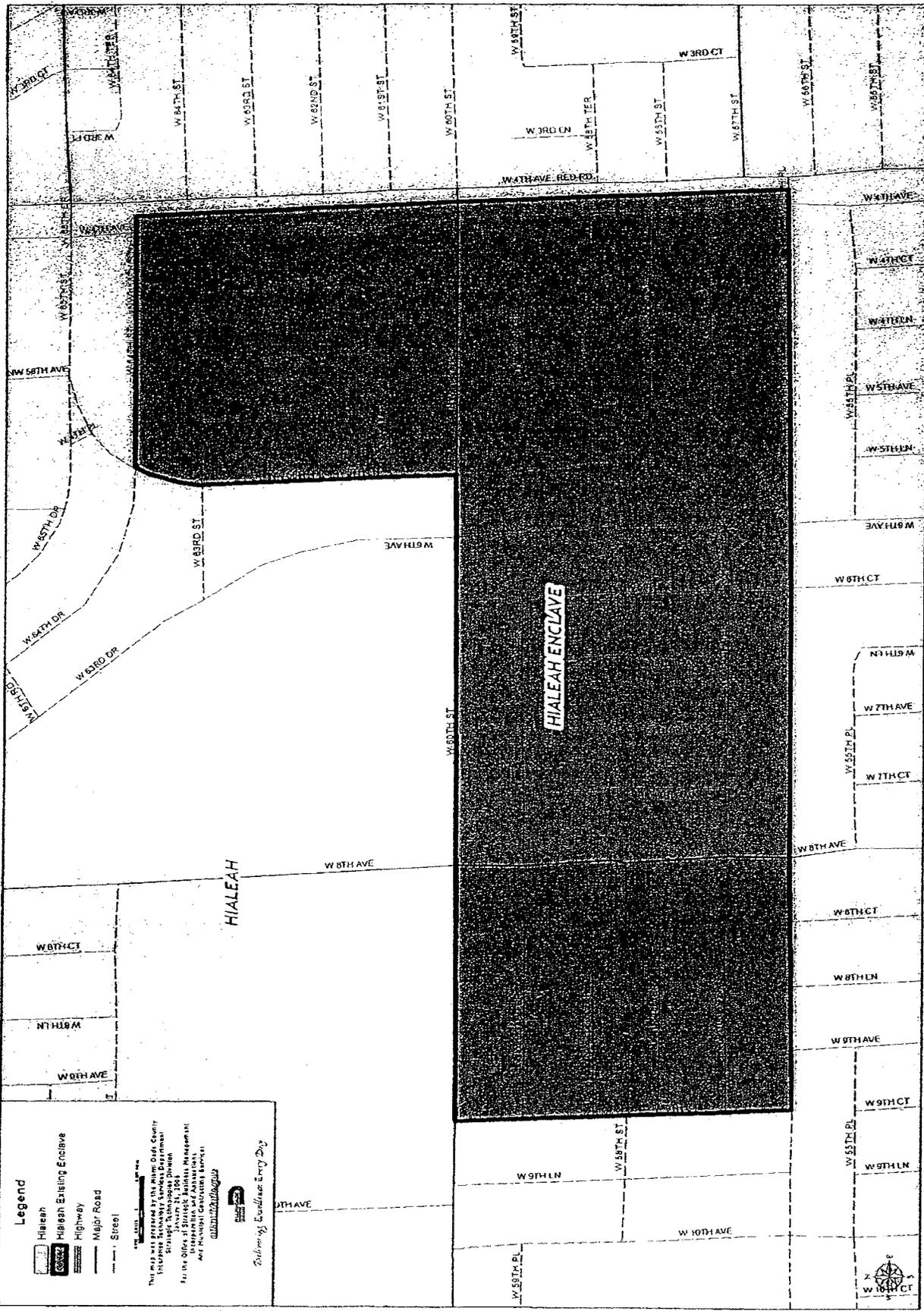
This map was prepared by the Miami-Dade County  
Enterprise Technology Services Department  
Strategic Technology Division  
January 26, 2009  
For the Office of Strategic Business Management  
Information and Applications  
and Municipal Contracting Services

*submit@3gpc.com*



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*Miami-Dade County*  
Hialeah Existing Enclave



**Legend**

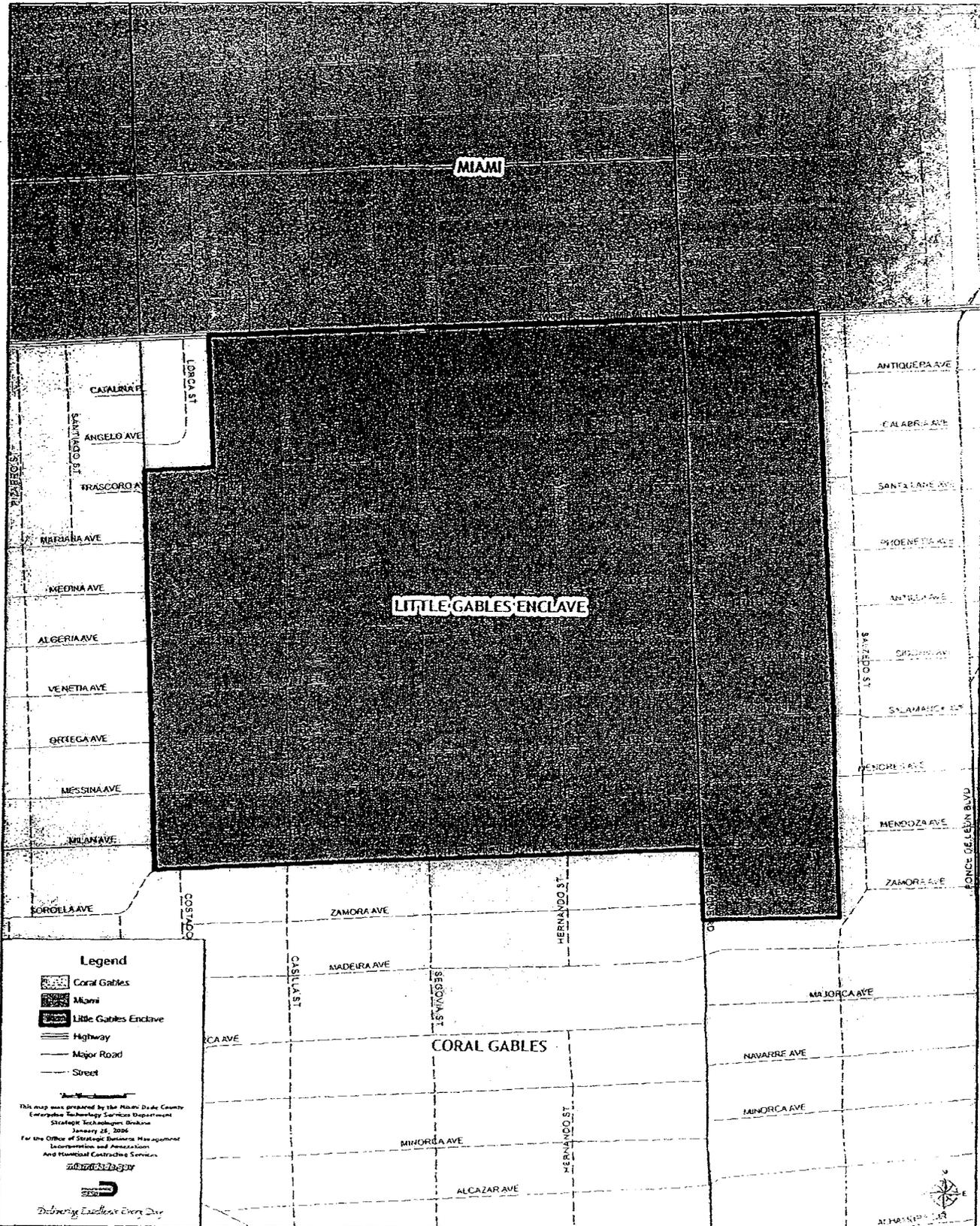
- Hialeah
- Hialeah Existing Enclave
- Highway
- Major Road
- Street

This map was prepared by the Planning and Development Department, City of Hialeah, Florida. It is based on the official records of the City of Hialeah, Florida, and is not intended to be used for any other purpose. For more information, please contact the City of Hialeah, Planning and Development Department, 10000 W. 10th Ave., Hialeah, FL 33157. (305) 885-1111.

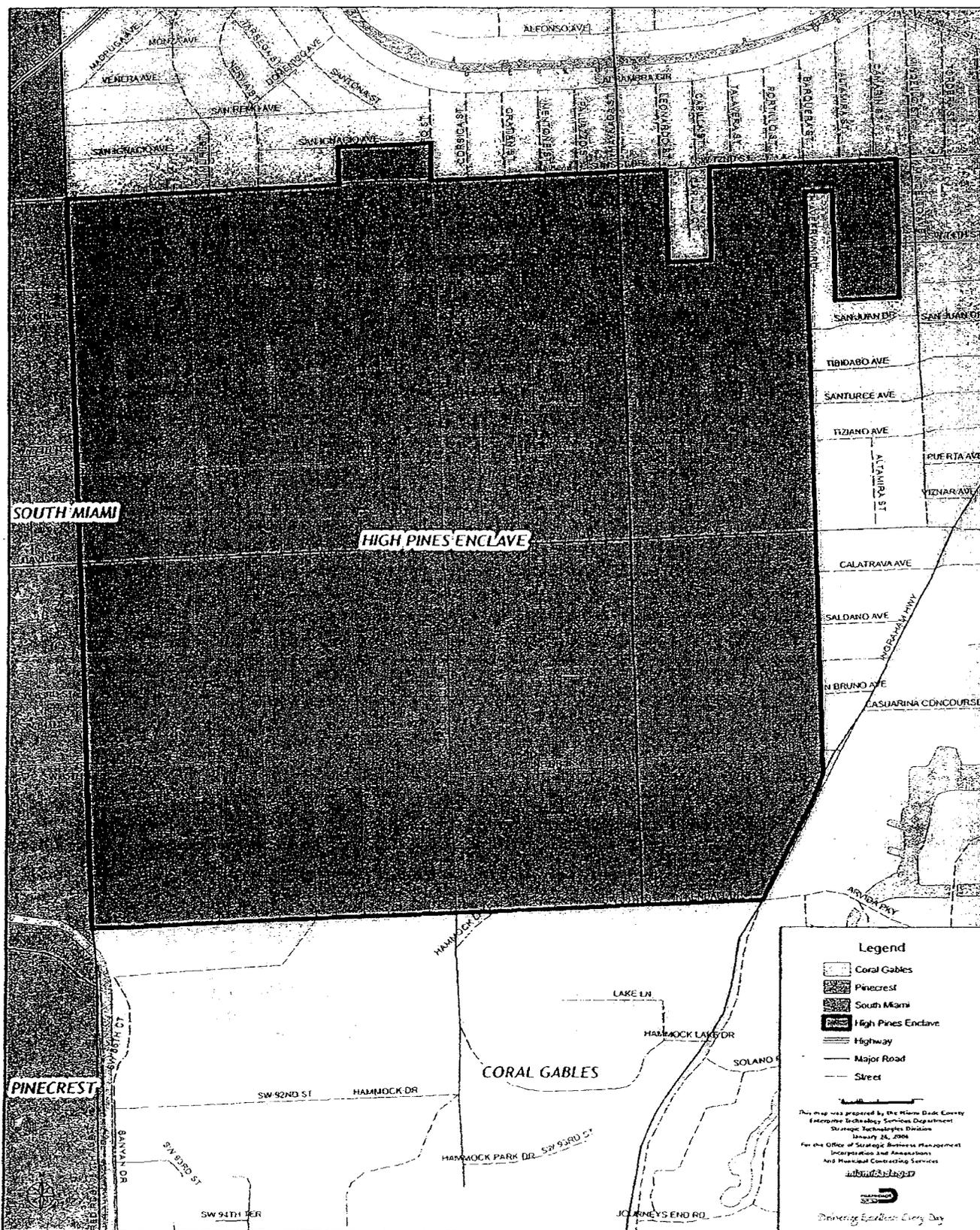
*Engineering Excellence Every Day*

# Miami-Dade County

## Little Gables Existing Enclave

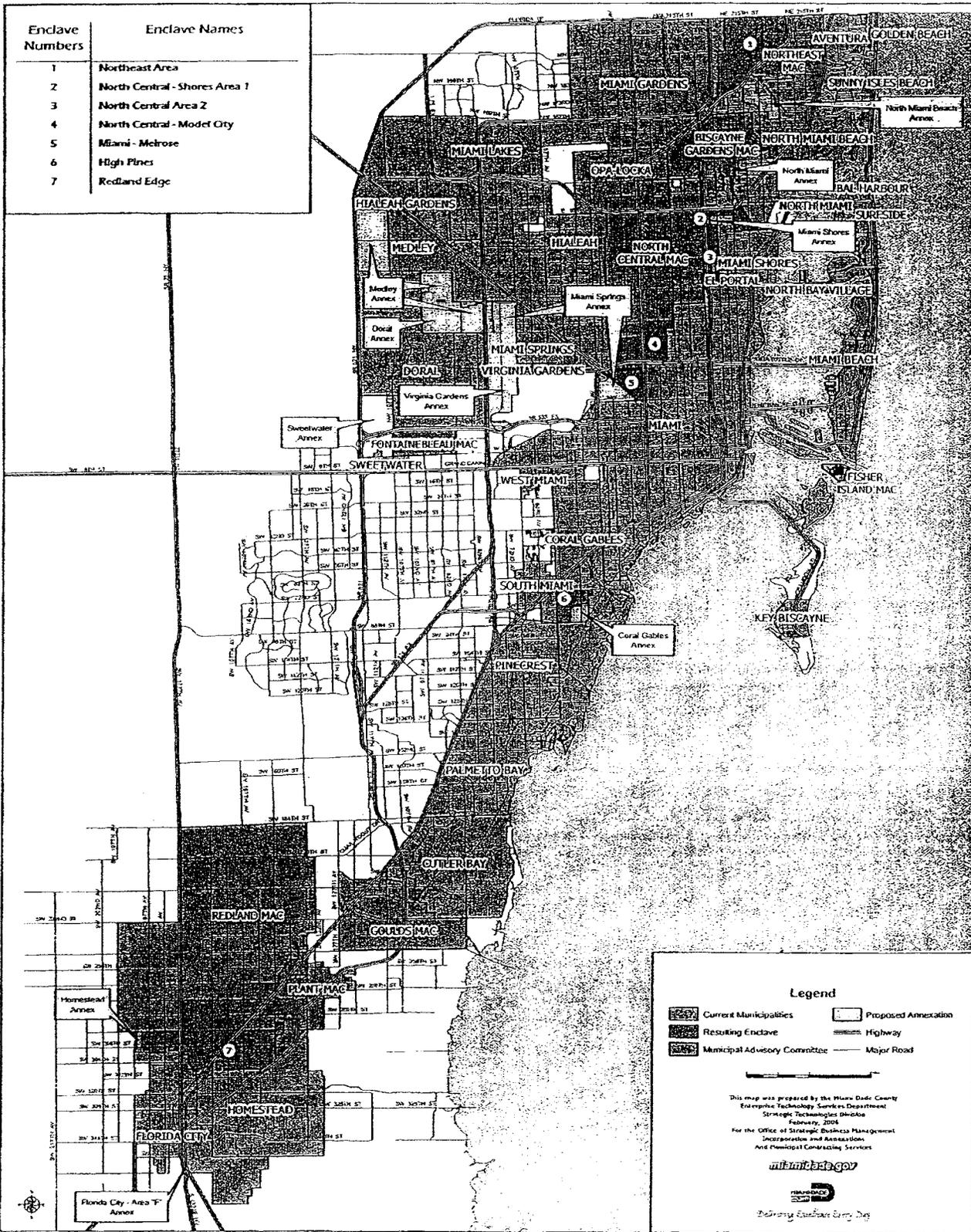


# Miami-Dade County High Pines Existing Enclave



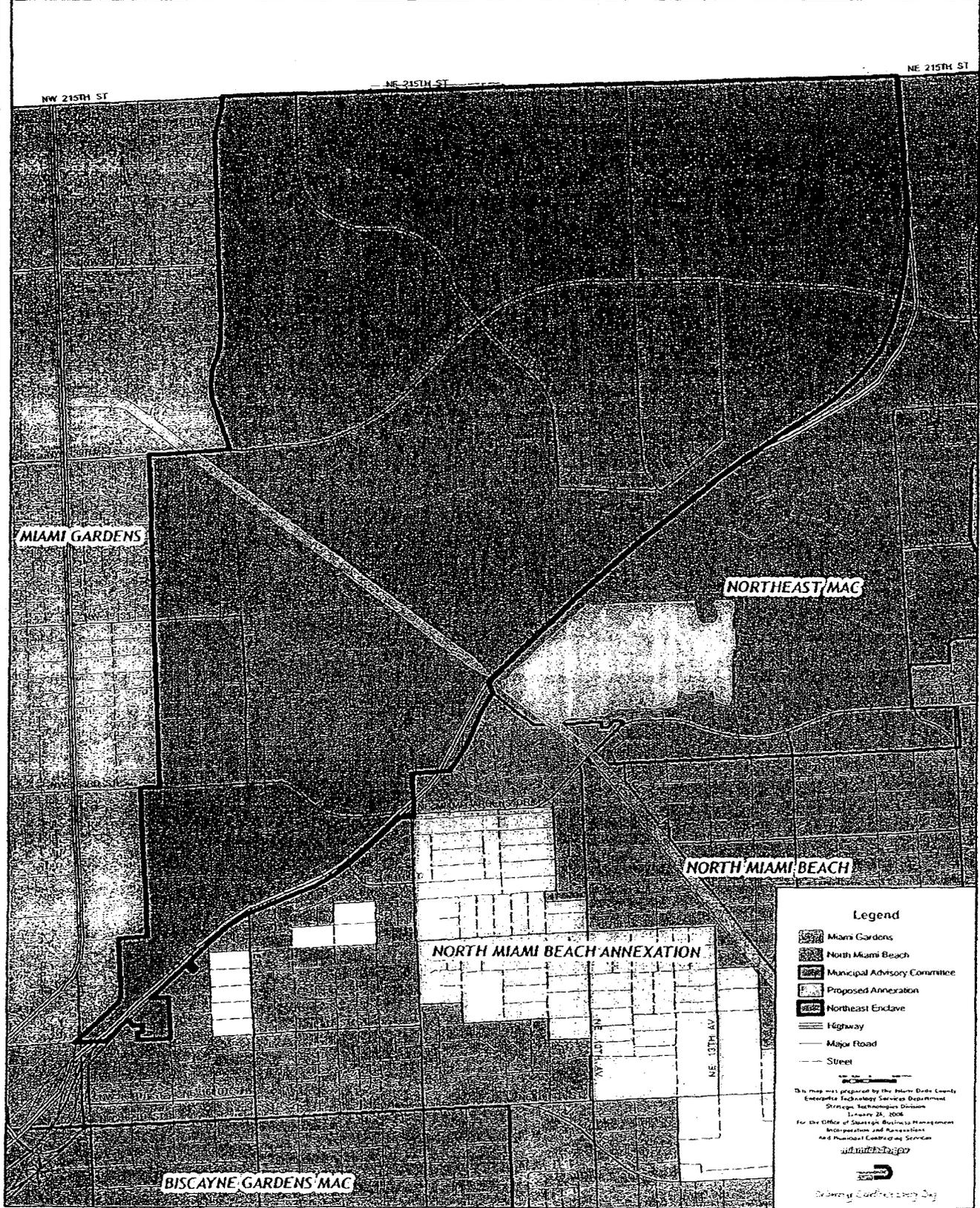
### Miami-Dade County Resulting Enclaves

Enclave Numbers	Enclave Names
1	Northeast Area
2	North Central - Shores Area 1
3	North Central Area 2
4	North Central - Model City
5	Miami - Melrose
6	High Pines
7	Redland Edge

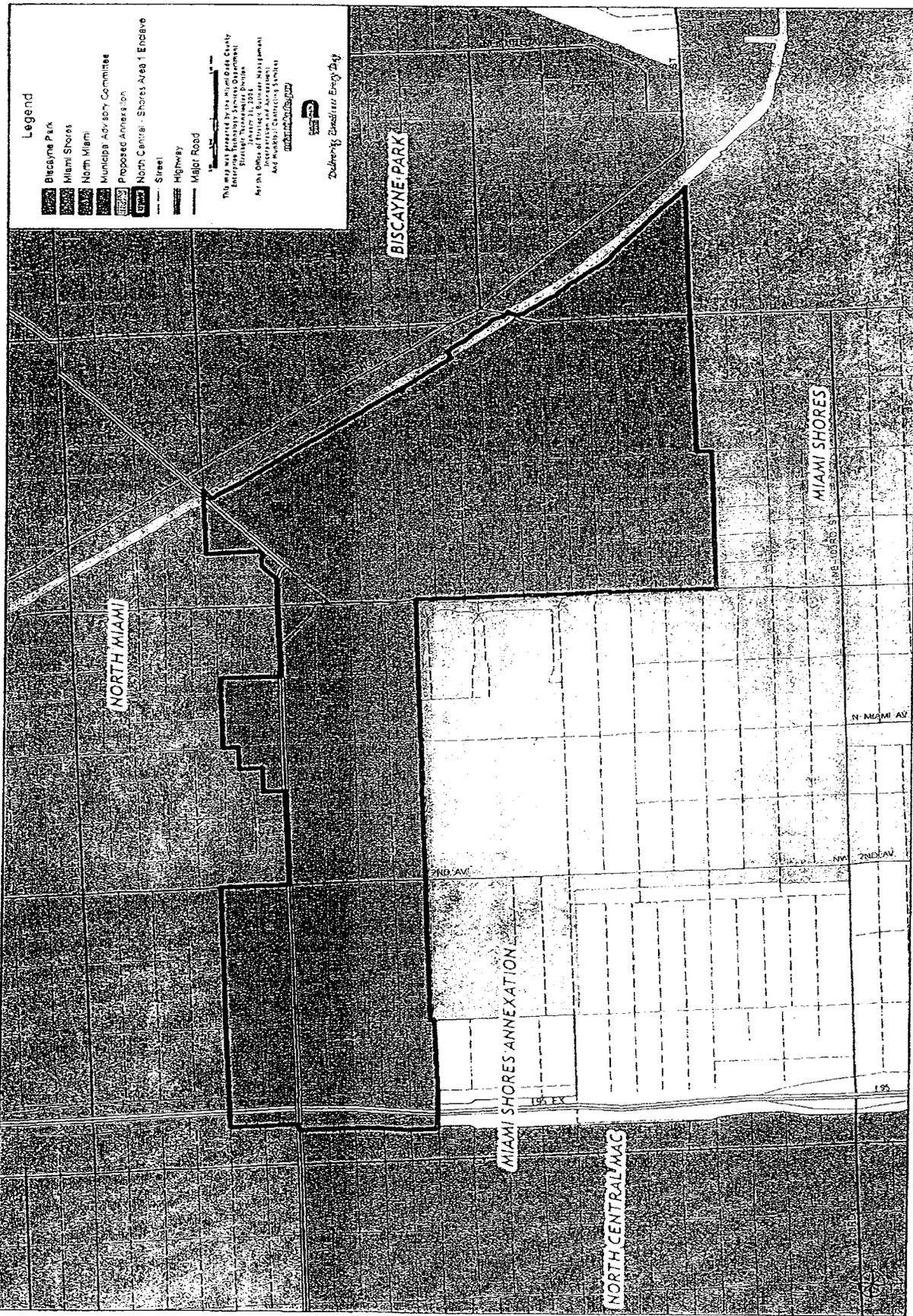


# Miami-Dade County

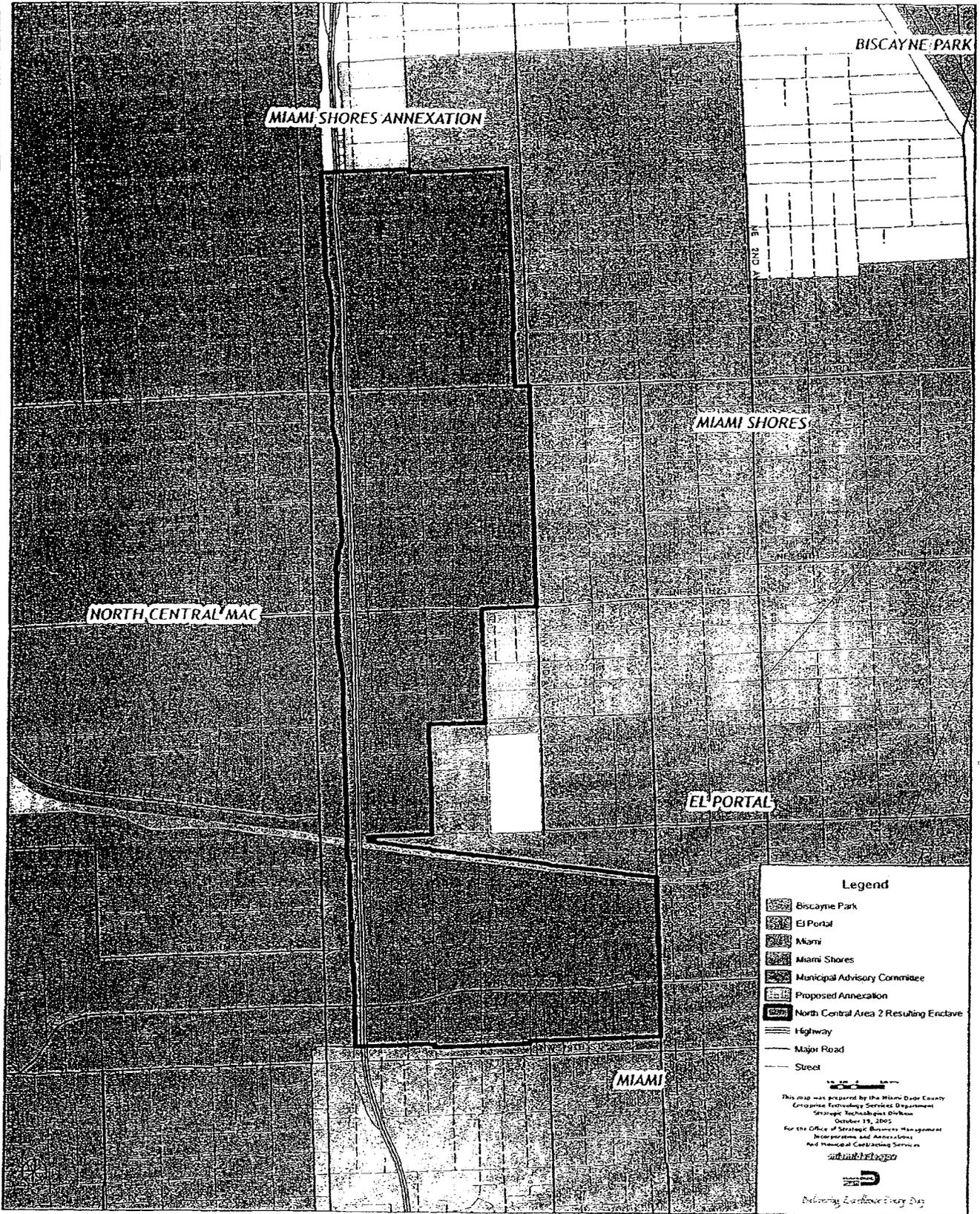
## Northeast Resulting Enclave



*Miami-Dade County*  
 North Central - Shores Area 1 Resulting Enclave



Miami-Dade County  
North Central Area 2 Resulting Enclave



**Legend**

- Biscayne Park
- El Portal
- Miami
- Miami Shores
- Municipal Advisory Committee
- Proposed Annexation
- North Central Area 2 Resulting Enclave
- Highway
- Major Road
- Street

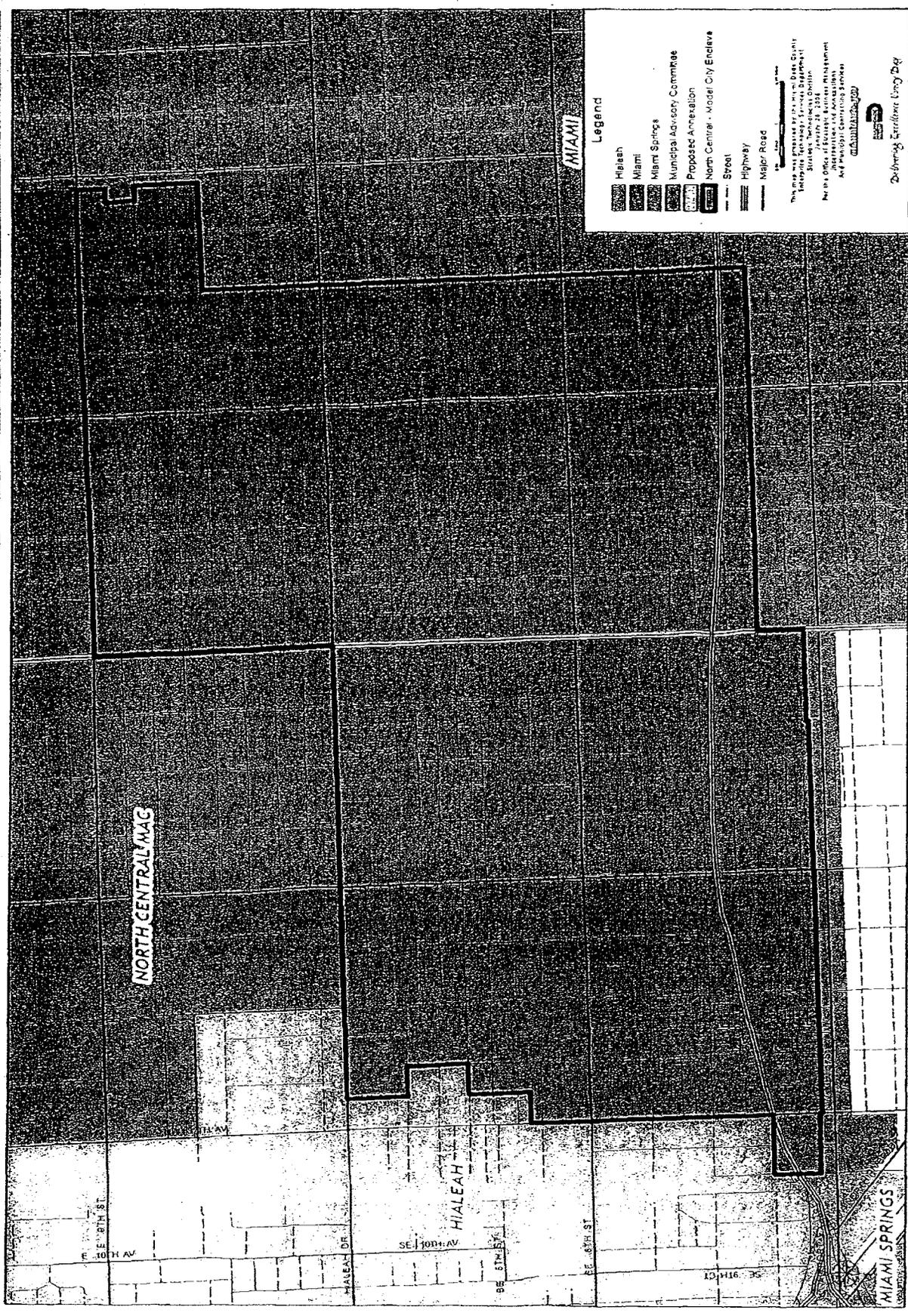
This map was prepared by the Miami-Dade County  
Geographic Information Services Department  
Strategic Technology Division  
October 19, 2005  
For the Office of Strategic Business Management  
Incorporations and Annexations  
And Municipal Contracting Services

*suburban*

**Suburban**

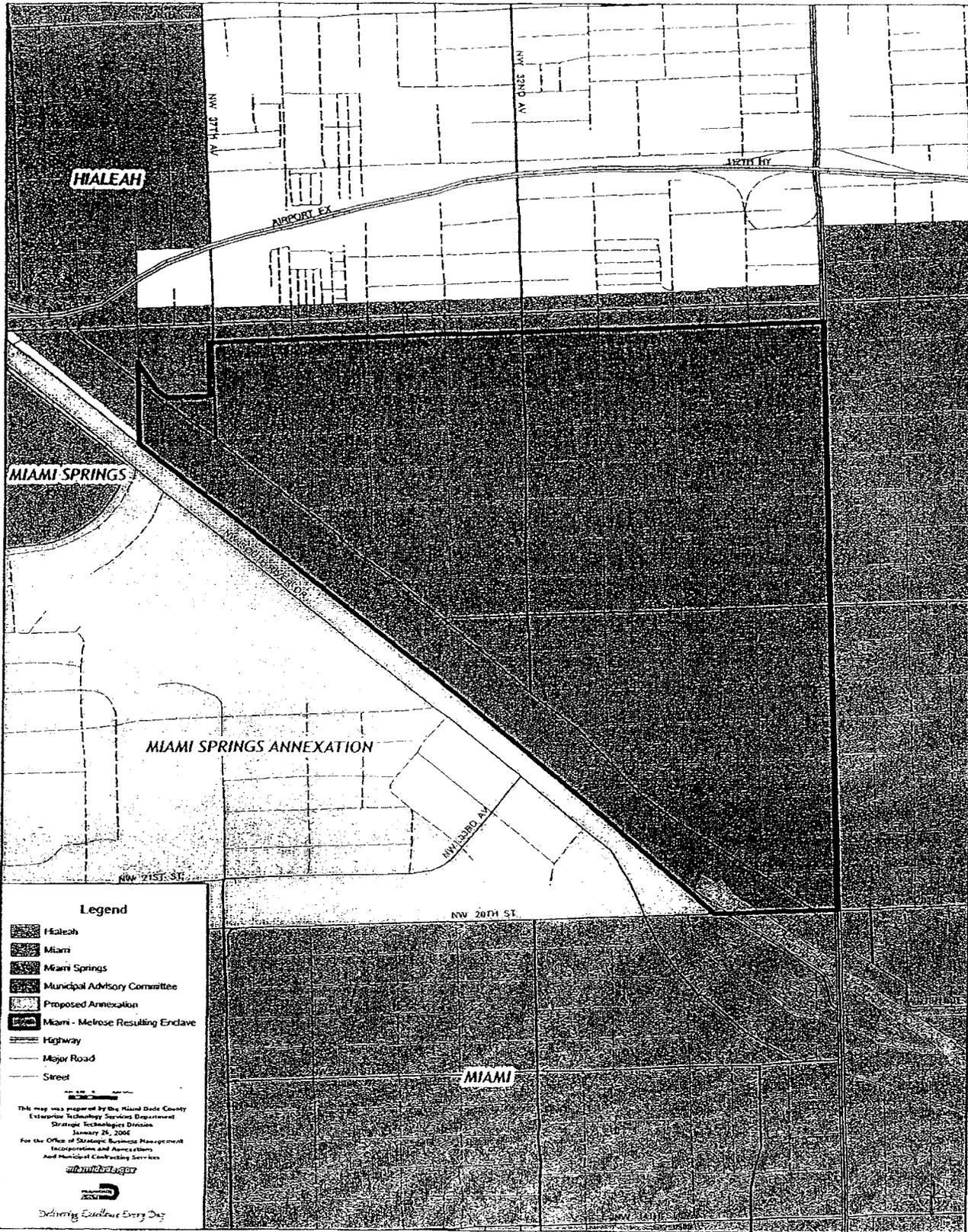
Delivering Excellence Every Day

*Miami-Dade County*  
North Central - Model City Resulting Enclave

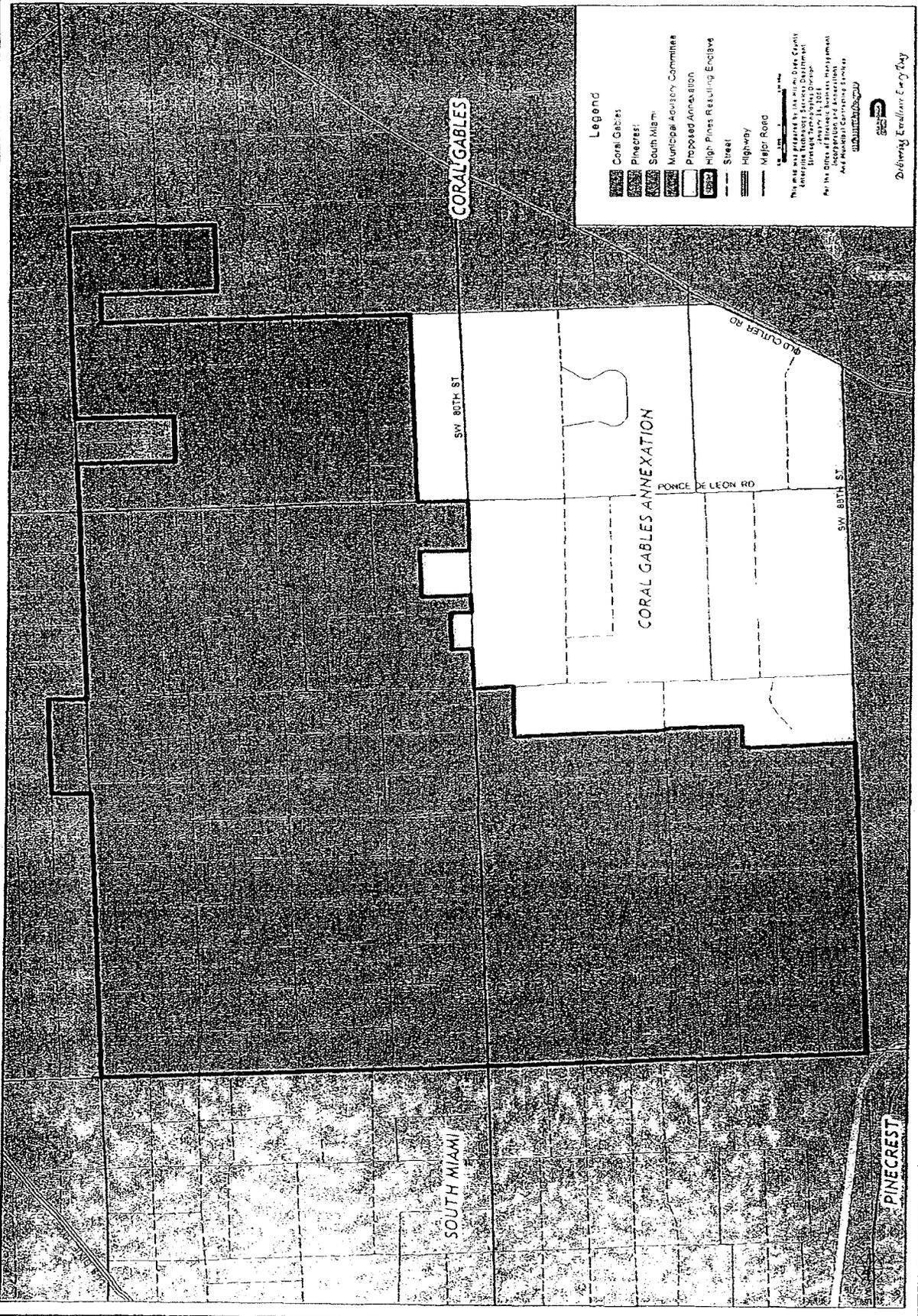


# Miami-Dade County

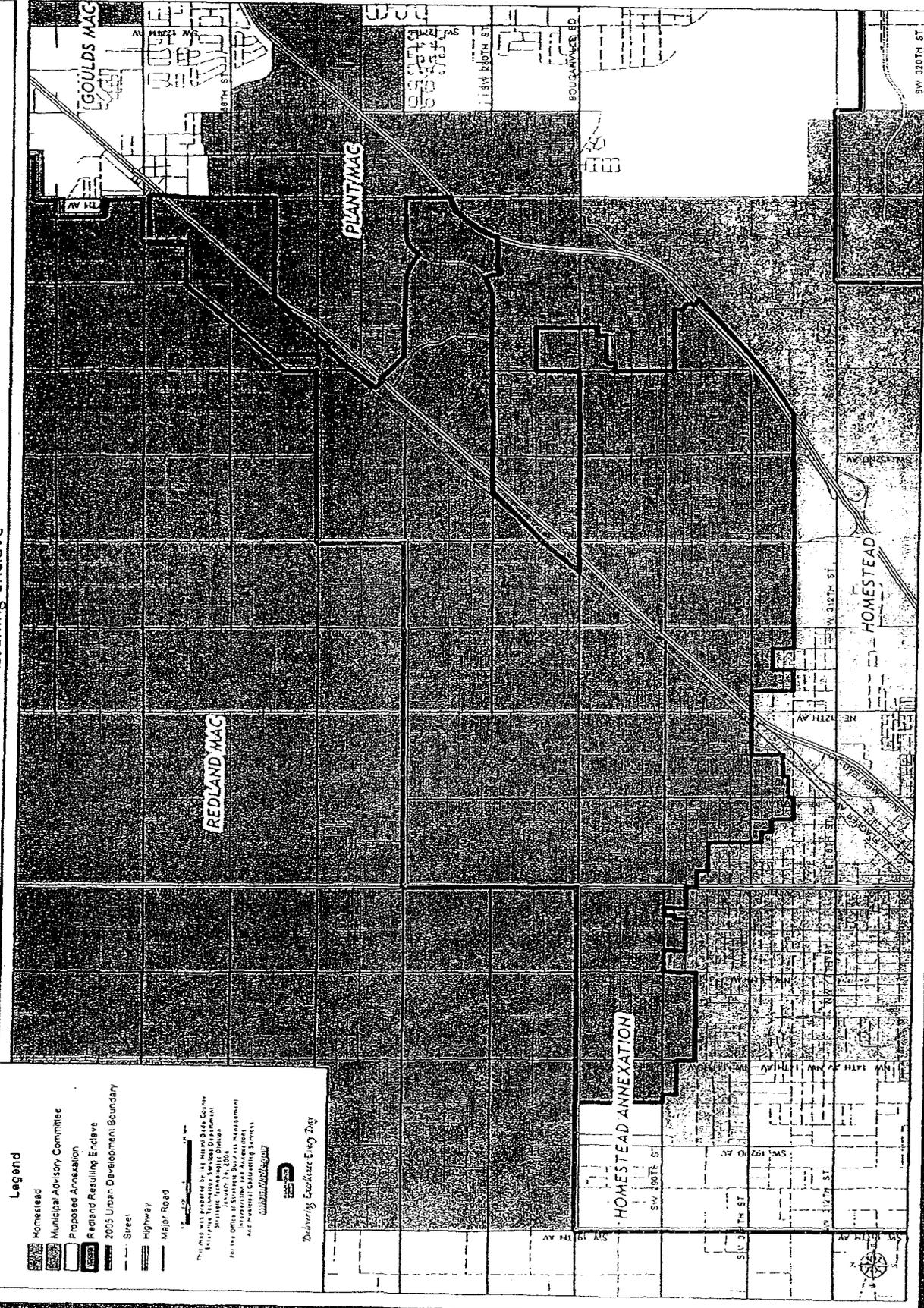
## Miami - Melrose Resulting Enclave



*Miami-Dade County*  
High Pines Resulting Enclave



# Miami-Dade County Redland Resulting Enclave



**Legend**

- Homestead
- Municipal Advisory Committee
- Proposed Annexation
- Redland Resulting Enclave
- 2005 Urban Development Boundary
- Street
- Highway
- Major Road

This map was prepared by the Miami-Dade County Planning Department for the 2005 Urban Development Boundary. It is intended for informational purposes only and does not constitute a contract or any other legal instrument. For more information, please contact the Planning Department at (305) 375-2000.

**City of Miami-Dade**  
Department of Planning

Prepared by: **Escherich Engineering, Inc.**

**Recommended Process for Future  
Comprehensive Development Master Plan (CDMP)  
Amendments and Zoning Changes**

The following process for future CDMP amendments and zoning changes should be formally adopted through appropriate legislation.

- Any proposed amendment to the municipality's comprehensive plan, whether initiated by the municipality or by an individual property owner, must be submitted to the County's Planning and Zoning Director for review and comment prior to any public hearing or action by the municipality addressing the proposal. The Planning and Zoning Director will review the proposed amendment and make a recommended determination of whether or not the proposed amendment is consistent with the CDMP. The proposed amendment and the Director's recommendation will be scheduled for a public hearing of the Planning Advisory Board (PAB). The County Manager will also have the authority to file proposed municipal comprehensive plan amendments within the municipality on behalf of Miami-Dade County. The County's Planning and Zoning Director, PAB, and/or the BCC may file the applications with a predetermination of CDMP consistency.
- If the Planning and Zoning Director and the PAB concur that the proposal would be consistent with the CDMP, the Planning and Zoning Director will issue notice to the municipality (after an appeal period) that it may proceed to consider approving the amendment to its plan. After receipt of the County's finding that the proposed municipal comprehensive plan amendment is consistent with the CDMP, the municipality may proceed to transmit or adopt the proposed plan amendment, with changes if instructed by the BCC.
- If the PAB or the Planning and Zoning Director finds that the amendment, if adopted, would be inconsistent with the County's CDMP, the matter will be referred to the BCC for public hearing and issuance of a final determination. The BCC, at the conclusion of its public hearing to address a proposed municipal plan amendment determined inconsistent by the PAB or the Planning and Zoning Director, may find the amendment to be inconsistent with the CDMP, however, still authorize the municipality to transmit the proposed amendment to the state with required changes to the amendment that would bring the proposal into conformity with the CDMP; or the BCC could find the amendment to be inconsistent with the CDMP and require that the municipality not transmit the proposed amendment to the state or adopt it.
- The municipality will notify the Planning and Zoning Director of any proposals to adopt or revise Land Development Regulations (LDRs) applicable to the area outside the UDB including, but not limited to, requests for exceptions, variances, and district boundary changes. The Planning and Zoning Director will determine whether or not the regulation, revision, or rezoning is consistent with the County's CDMP. If the Planning and Zoning Director determines that the regulation, revision or rezoning is consistent with the CDMP, he or she will (after an appeal period) issue notice to the municipality that it may approve the proposal. If the Planning and Zoning Director determines that the regulation, revision or rezoning

is inconsistent with the CDMP, the municipality may not approve the proposal. Appeals of Planning and Zoning Director's decisions regarding consistency of LDRs will be appealed to the PAB.

- The Planning and Zoning Director will have the authority to make recommendations to the municipality for municipal regulation or rezoning necessary to implement the CDMP. Decisions and/or determinations regarding zoning matters will be appealed to the BCC.
- The municipality will be required to submit to the Planning and Zoning Director a report listing, by type and location, development permits issued in the area outside of the UDB on a quarterly basis.
- If the municipality fails to comply with the terms of the interlocal agreement with respect to all or part of the annexed area, the municipality will be subject to fines (to be determined) and the BCC will assume authority for land use and zoning decisions in the subject area for a period of time to be determined.



Office of the County Manager  
111 NW 1st Street • Suite 2910  
Miami, Florida 33128-1994  
T 305-375-5311 F 305-375-1262

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- Urban Revitalization Task Force
- Vizcaya Museum and Gardens
- Water and Sewers

May 2, 2006

Mr. Alex Rey  
Town Manager  
Town of Miami Lakes  
15700 NW 67 Avenue  
Miami Lakes, FL 33014

Dear Mr. Rey:

In accordance with the enclosed Resolution R-1051-05 adopted by the Board of County Commissioners on September 8, 2005, I am forwarding a copy of the County Manager's *Report on Incorporation and Annexation*.

I invite you to provide written comments in response to this report. If you have any questions, please do not hesitate to call Assistant County Manager Roger Carlton at (305) 375-3640.

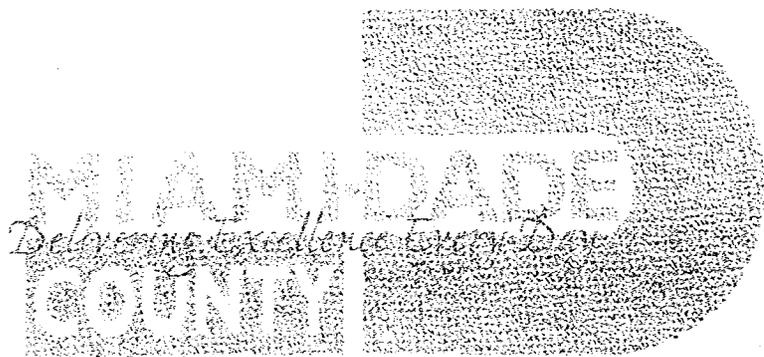
Sincerely,

  
George M. Burgess  
County Manager

Enclosures

c: Wayne Slayton, Mayor, Town of Miami Lakes  
Roger Carlton, Assistant County Manager  
Jennifer Glazer-Moon, Director, Office of Strategic Business Management

cm007306B





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- Water and Sewer

May 2, 2006

Mr. Charles Scurr  
Village Manager  
Village of Palmetto Bay  
8950 S.W. 152<sup>nd</sup> Street  
Palmetto Bay, FL 33157

Dear Mr. Scurr:

In accordance with the enclosed Resolution R-1051-05 adopted by the Board of County Commissioners on September 8, 2005, I am forwarding a copy of the County Manager's *Report on Incorporation and Annexation*.

I invite you to provide written comments in response to this report. If you have any questions, please do not hesitate to call Assistant County Manager Roger Cariton at (305) 375-3640.

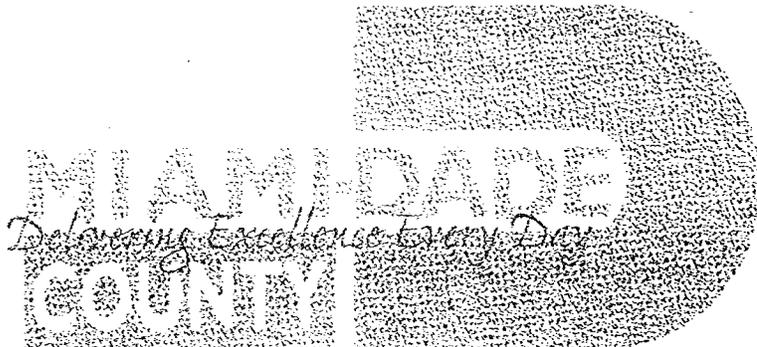
Sincerely,

  
George M. Burges  
County Manager

Enclosures

- c: Eugene P. Flinn, Jr., Mayor, Village of Palmetto Bay
- Roger Cariton, Assistant County Manager
- Jennifer Glazer-Moon, Director, Office of Strategic Business Management

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May 2, 2006

Mr. Danny O. Crew  
City Manager  
City of Miami Gardens  
1515 NW 167 Street, Suite 200  
Miami Gardens, FL 33169

Dear Mr. Crew:

In accordance with the enclosed Resolution R-1051-05 adopted by the Board of County Commissioners on September 8, 2005, I am forwarding a copy of the County Manager's *Report on Incorporation and Annexation*.

I invite you to provide written comments in response to this report. If you have any questions, please do not hesitate to call Assistant County Manager Roger Carlton at (305) 375-3640.

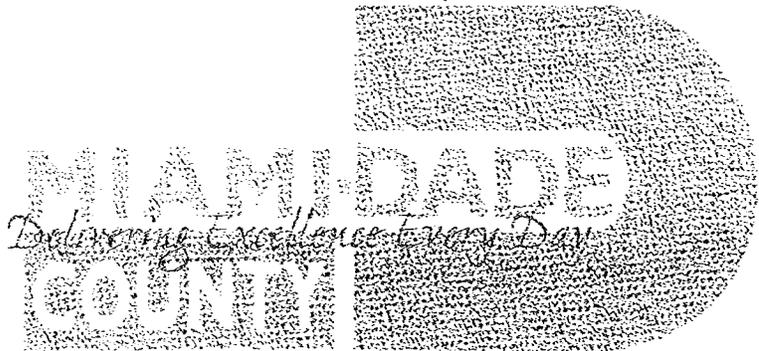
Sincerely,

  
George M. Burgess  
County Manager

Enclosures

c: Shirley Gibson, Mayor, City of Miami Gardens  
Roger Carlton, Assistant County Manager  
Jennifer Glazer-Moon, Director, Office of Strategic Business Management

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May 2, 2006

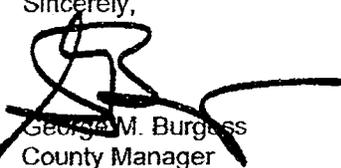
Mr. Sergio Purriños  
City Manager  
City of Doral  
8300 NW 53 Street, Suite 100  
Doral, FL 33166

Dear Mr. Purriños:

In accordance with the enclosed Resolution R-1051-05 adopted by the Board of County Commissioners on September 8, 2005, I am forwarding a copy of the County Manager's Report on Incorporation and Annexation.

I invite you to provide written comments in response to this report. If you have any questions, please do not hesitate to call Assistant County Manager Roger Carlton at (305) 375-3640.

Sincerely,

  
George M. Burgess  
County Manager

Enclosures

c: Juan Carlos Bermudez, Mayor, City of Doral  
Roger Carlton, Assistant County Manager  
Jennifer Glazer-Moon, Director, Office of Strategic Business Management

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