



# PMG Associates, Inc.

Economic, Marketing and Management Consultants

Deerfield Beach, FL

Miami, FL

Hendersonville, NC

March 27, 2017

Mr. Martin Murphy, Assistant to the City Manager  
City of New Port Richey  
5919 Main Street  
New Port Richey, Florida 34652

Re: New Port Richey Annexation Feasibility & Strategy Study

PMG Associates, Inc. (PMGA) is pleased to submit this proposal to complete the New Port Richey Annexation Feasibility & Strategy Study. We have prepared a Scope of Services, Price Proposal and Timeline for the completion of the project.

For the Timeline, we estimated a start date of April 17 and we estimate a total schedule of four months. This schedule is based on timely assistance from the City and County Departments. We also need a map of the Utility Service Area, preferably in GIS.

The detailed information is included in the following attachments

Very truly yours,  
PMG Associates, Inc.

***Kathleen R. Gonot***  
Kathleen R. Gonot  
President

- Total population
- Population by age
- Housing (number and type)
- Owner-occupied vs. Renter-occupied
- Other as required

### **TASK 3. FISCAL IMPACTS**

Identify and analyze the factors that impact the City and the potential residents financially.

- Tax and fee analysis will be conducted by identifying all of the taxes and fees that are paid by residents and property owners in the study area. Factors include: Ad Valorem Taxes, Assessments, Utility Taxes, Franchise Fees, Fire/EMS Fees, Utility Charges and garbage rates. A comparison between the rates charged in New Port Richey and those imposed in Pasco County will be made.
- Revenues distributed to the City based on State law including State Shared Revenue, ½ Sales Tax and Communications Service Tax
- A total cost to the homeowner and property owner will be presented which is an accumulation of all the taxes and fees. A comparison between unincorporated Pasco County and New Port Richey will be included.
- Taxable values for the study area will be obtained from the Pasco County Property Appraiser through New Port Richey. Other data such as property use and exemptions will also be collected.
- Revenues collected by New Port Richey will be identified which will include all of the taxes and fees collected by the study area.
- Revenues by each sub-area will also be presented.
- Revenues by fund type will be projected to distinguish between General Fund and Enterprise Funds.

### **TASK 4. LEVEL OF SERVICE ANALYSIS**

Data from Pasco County will form a portion of the basis for the evaluation of the unincorporated areas. New Port Richey will be requested to assist in obtaining this data. The data required includes:

- Call data for Sheriff's Department
- Call data from the County Fire/Rescue
- Code Enforcement records
- Drainage information
- Infrastructure identification

The impacts on the level of service for the study area will also be identified. Service items will be clearly identified and analyzed for all appropriate departments including:

- Police
- Fire

## **TASK 6. MEET WITH PASCO COUNTY**

Attend a meeting between New Port Richey and Pasco County to discuss the potential interlocal agreements possible for the annexation of properties into the City of New Port Richey. The discussion would include specific reference to enclaves as well as the County's overall approach to the question of annexation.

## **TASK 7. SUMMARY OF FISCAL IMPACTS**

A summary of the total revenues generated as well as the total expenditures required to service the potential annexation area will be developed. This summary will list the revenue and expenditure items by budgetary designations of line item and department. The expenditures will include an estimate of the additional staff and capital items required. Staff will be listed by job classification.

The fiscal summary will be produced for each sub-area, for combinations of sub-areas and for the entire Study Area.

## **TASK 8. LAND USE REGULATIONS**

Identify zoning and land use regulations that exist in Pasco County and New Port Richey. Determine if any significant differences occur including permitted uses and other factors that affect lifestyles. This analysis will examine items such as setbacks, parking of large vehicles, allowance of animals and other factors. The final comparison will include a matrix identifying the issues and the regulations in each governmental entity.

This segment will also consider the impact of annexation on the Level of Service standards in the Comprehensive Plan, particularly addressing park lands.

## **TASK 9. STRATEGY RECOMMENDATIONS**

Provide a recommendation of the steps to be undertaken by New Port Richey to implement the annexation. The overall strategy will list a plan of action and time frames for the activities.

## **TASK 10. REPORT AND MEETINGS**

A draft report will be completed which contains all of the assumptions, analysis, findings and data for this study. The report will also include an Executive Summary which will enumerate all of the key factors of the study. After review by the staff of New Port Richey, a final report will be presented that includes any clarifications or modifications requested by the City. Mapping will be provided which illustrates the analysis and findings. The maps will be provided in 8 1/2 by 11 inches as well as 24 x 36 inches.

Progress meetings between the Consultant and staff will be held periodically throughout the contract these meetings can be accomplished by telephone. A presentation of the report will be made at the draft level to staff and to the Council after completion of the final report.

**ATTACHMENT “C”  
CITY OF NEW PORT RICHEY  
ANNEXATION FEASIBILITY AND STRATEGY STUDY**

**PROPOSED TIMELINE**

PMG Associates, Inc. proposes to complete the analysis of annexation feasibility within four months from Receipt of a Notice To Proceed. The estimate of the time frames depends on receipt of data and the conclusion of meetings. The outline of the Timeline follows the Task numbers found in Attachment A and are as follows:

Task	Description	Estimated Time Frame
1	Kick-off Meeting	4/17 – 4/21
2	Area Analysis	4/17 – 5/15
3	Fiscal Impacts	5/1 – 5/22
4	Level of Service	4/17 – 5/29
5	Infrastructure/Mapping	4/17 – 5/15
6	Summary of Fiscal Impacts	5/15 – 5/22
7	Meeting with Pasco County	6/5 – 6/9
8	Land Use Regulations	4/17 – 5/8
9	Strategy Recommendations	6/12 – 6/26
10	Report/Meetings/Presentation	As scheduled

**Milestones:**

- Draft Report – 7/10
- Final Report – 7/24
- Presentation – As scheduled