



Punta Gorda Isles

Additional Charlotte Harbor Access Apportionment Methodology

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Discussion Topics

- Legal Requirements
- Harbor Access Project Background
- Benefit Area
- Special Benefit
- Recommended Apportionment Method

Special Assessments

Special assessments are charges assessed against the property of some particular locality because that property derives some special benefit from the expenditure of the money.

Case Law Requirements

Special Benefit to Property

and

Fair and Reasonable Apportionment

Examples of Special Benefit

- Fire Protection
- Fire & Rescue Services
- Street Improvements
- Parking Facilities
- Downtown Redevelopment
- Solid Waste
- Sewer Improvements
- Stormwater

No Special Benefit

- Public Hospitals
- Public Health Units
- Emergency Medical Services
- Law Enforcement
- Community Resource Facilities

Fair and Reasonable Apportionment

- Logically and factually driven method must be developed to spread the costs among the benefited properties.
- Does method of apportionment make sense in terms of what is being provided?
- Legislative determination receives judicial deference.

Methods of Apportionment

- Physical Use of Property
- Relative Proximity to Facility
- Amount of Service/Facility Required
- Lineal Front Foot
- Per Parcel or Unit
- Square Footage of Improvements
- Relative Value of Property
- Combination of Factors

Harbor Access Project

- Additional Navigational Access Canal
- Connect Punta Gorda Isles to Charlotte Harbor
- Alternative 6 Bird Cut East
 - 1,446 x 60 channel
 - Connect through Alligator Creek
- Estimated project cost = \$1,500,000

Benefit Area

- South of Aquí Esta Drive, West of Almar Drive and city limits, and largely east of Bal Harbor Blvd.
- Mixed use area, but mainly residential

858 improved SF

327 unimproved SF

878 improved condos

105 acre unplatted area

4 improved MF

240 unimproved MF

2 government

- Established half way point between Ponce de Leon Inlet and Alligator Creek based on navigable travel distance

Only canal abutting properties

All developed or developable properties that could be improved with a dock, boat slip, or other water access improvements

River Bay Drive properties in unincorporated Charlotte County

Special Benefit Assumptions

- Improved navigational access
- Decreased travel time to Charlotte Harbor
- Second access point
- Better boating experience
- Water quality improvements
- Improved property values

Apportionment Method

- Developed and Developable Parcels
- Abutting Canal
- Within the Benefit Area
- Current Regulations allow at least one dock or boatlift
- Water Access Units

Water Access Units

- Dock, landing, ramp, slip, bay, lift, wharf, or other structure for receiving boats and other water craft allowable under existing regulations.
- Standard unit for assessment calculation as a proxy for the estimated special benefit provided to each parcel.

Assignment of Water Access Units

- Assigned in accordance with Sections 6-6(c) and 6-6(j) of the City Code.
- Maximum number of existing or permitted, whichever is greater.
- Condo water access units divided among all tax parcels served thereby.

Assessments

- Project costs, financing, administration, collection, and statutory discount
- Payable over a term of years, not the exceed the useful life of the project
- Project Cost updated
- Permits
- Water Access Unit Assignment

Questions?