

CENTER FOR COMMUNITY GROWTH AND CHANGE

BLUFFTON ANNEXATION STUDY

BUCK ISLAND AND SIMMONSVILLE ROAD ANNEXATION AREA



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INTRODUCTION

PURPOSE OF THE STUDY

The purpose of this report is to answer a relatively straightforward question: How much will it cost the Town of Bluffton to annex the Buck Island / Simmonsville Road area? The task at hand is to weigh the economic value of the Buck Island / Simmonsville Road Annexation in terms of its potential expenditures versus its potential revenues.

The objectives of this study are:

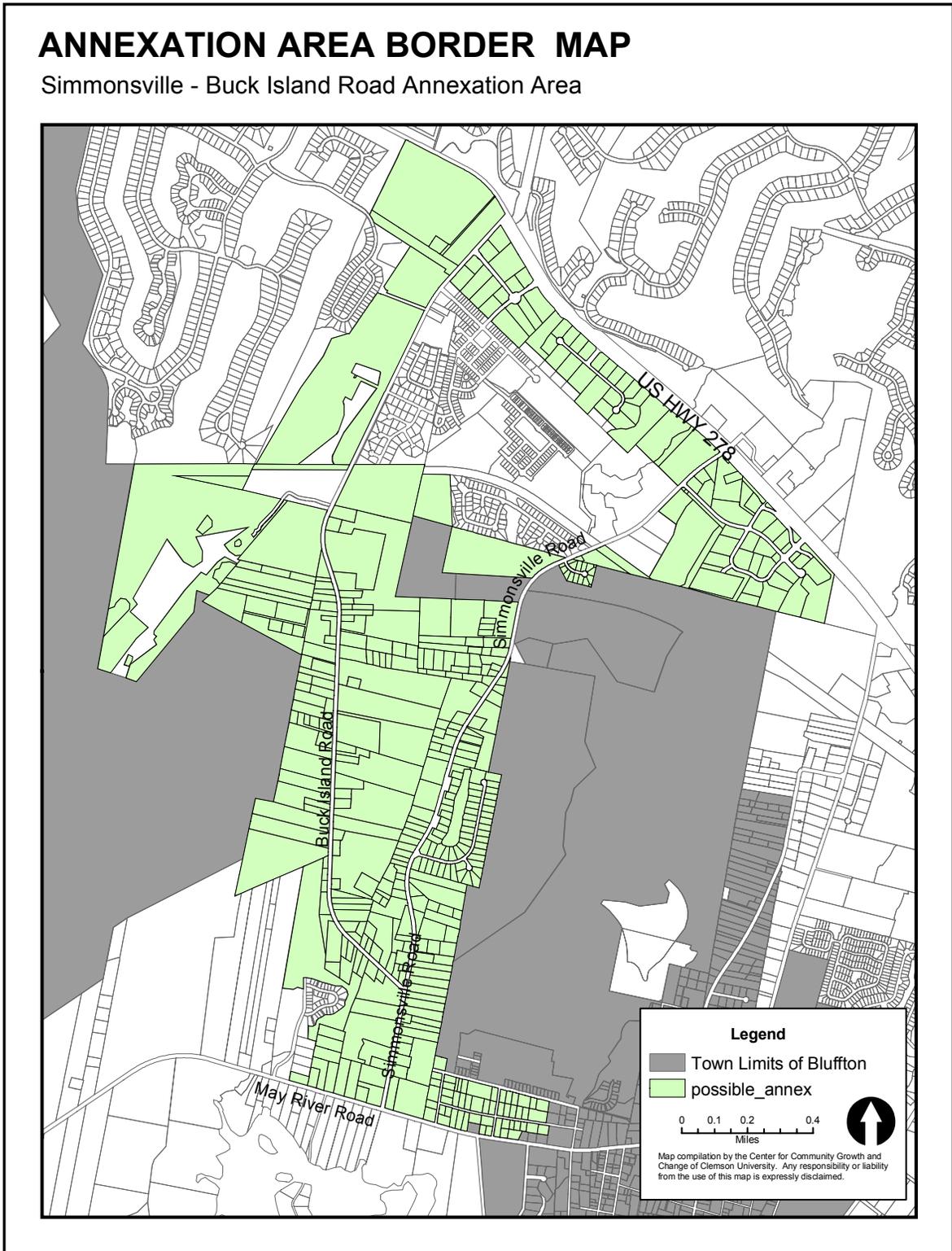
- To provide the Town of Bluffton with the necessary data to determine if annexation and the extension of services are feasible and within their economic capabilities; and
- To provide town planners and decision makers with a template for the analysis of future annexations that may help the Town examine the needs of residents as well as surrounding communities to provide for mutually beneficial growth strategies.

The first step in the analysis is to define the area by both geographical boundary (See Map 1), and by demographic profile, in order to gain a solid understanding of the study area's composition. This will be accomplished in the "Existing Conditions" chapter of the study.

As a cost-revenue analysis, this report will identify the pros and cons of the annexation in fiscal term. Such an analysis examines the basic economic factors affecting the decision; however, it does not address the possibility of other appropriate justifications for annexation (safety, growth control, community voice, etc.)



MAP 1: ANNEXATION AREA BORDERS



LEGAL ASPECTS OF ANNEXATION

Annexation must be an exercise in mutual benefit. Thus, one of the strongest guiding principles of annexation is citizen initiation. Consistent with South Carolina law, the Town of Bluffton regards annexation as a voluntary process and will only begin an annexation process if the property owners of the proposed annexation area show an earnest interest. According to the *Town of Bluffton Annexation Policy and Procedure* manual, annexation of privately owned property is authorized only after a certain percentage of the property owners petition an annexation. The percentage of petitions warrants one of three procedures of annexation:

- 1) 100 percent freeholder petition and ordinance method [§5-3-150(3)];
- 2) 75 percent freeholder petition and ordinance method [§5-3-150(1)]; or
- 3) 25 percent freeholder elector petition and election method [§5-3-300-315].

(Please refer to the Annexation Policy and Procedure manual for details.)

Commercial properties do not have a legal standing to oppose annexation even when they are a part of the annexation area. However, the commercial properties can be valued or assessed based on two approaches or methods:

- 1) Market Base Value Assessment: which the property is valued by the real estate value of the property; or
- 2) Economic Base Value or Income Based Assessment: which the level of income values the property it produces. In some cases this approach is more reflective of the true value of the property (The Old Carolina Golf Course is an example of commercial property within the proposed annexation that is valued based on an economic or income-based approach.).

The most common method is the market-value approach; however, the assessment method is chosen by the jurisdiction conducting the annexation. In regards to the current annexation, the standard market base value assessment is used for all properties except the Old Carolina Golf Course.

STRUCTURE OF REPORT

The basic structure of the report will follow the following agenda:

1. Existing Study Area
2. Impacts of Annexation
3. Recommendations

The report is followed by an appendix of the methodology of the research that can be used for consideration of future analysis of future annexations of other areas. It is important to note that this study is analyzing the costs and revenues that the annexation of Buck Island/Simmonsville Road annexation area will bring to the existing Town of Bluffton. This study bears no indication of how other growth within the community will simultaneously affect the level of service the Town will be able to provide.

THE TOWN'S RECENT HISTORY OF ANNEXATION

According to the U.S. Census, Bluffton's population increased by 73 percent, from 738 to 1275 residents, between 1990 and 2000. Bluffton's population grew noticeably during the past decade, as did its geographic area. Through several annexations, the Town of Bluffton grew from one square mile to approximately 47 square miles (or, from 640 to 30,402 acres).¹ The majority of the annexed acreage consists of four large, undeveloped tracts – Palmetto Bluff, the Jones Tract, the Buckwalter Tract. Smaller undeveloped annexations include Bluffton Village, Village at Verdier Plantation, and Willow Run.. In all four cases, the properties were owned by single landowners, which made them relatively easy to annex since they complied with the 100-percent freeholder petition and ordinance method. In addition, because the land was undeveloped, the developer and municipality were able to work together on a development agreement that

¹ Low Country Council of Governments. February 18, 2002. *Bluffton Community Strategic Plan*.

allowed a calculated and anticipated timeframe of municipal service implementation. See Table 1 for details of the annexed areas' development projections.

The first existing community that the Town of Bluffton annexed was the Schults/Goethe Road Annex in 2001. This annexation was comprised of a preexisting community of 125 households on 148 parcels of land. Due to existing annexation laws at that time, the process took longer than expected and cost the Town of Bluffton more money than had been anticipated. Because the delay caused a gap between the Town's ability to collect tax revenue and the implementation of municipal service to the newly annexed community, the Town experienced a financial shortfall. This gave the Schults/Goethe Road residents almost 2 years of tax-free service, such as garbage collection and police service before the taxation process was initiated. The Town Council has adopted a policy requiring a cost-benefit analysis to be performed on any area before it is considered for annexation.

Table 1: DEVELOPMENT PROJECTIONS OF ANNEXED AREAS WITHIN TOWN OF BLUFFTON

| | Year of Annexation | Number of Proposed Residential Units | Acres of Non-Residential* Development (as per Development Agreement) | Number of Years to Build Out |
|-----------------------------|--------------------|--------------------------------------|--|------------------------------|
| Palmetto Bluff | November, 1998 | 5,000 | 500 | 30 |
| Shults Tract | November, 1998 | 1,600 | 320 | 10 |
| Buckwalter | April, 2000 | 6,855 | 450 | 20-30 |
| Jones Tract | June, 2000 | 5,415 | 350 | 30 |
| Bluffton Village I | October, 2000 | 38 | 5 | 5 |
| Shults/Goethe Road** | 2001 | 0 | 0 | NA |
| Verdier Plantation | October, 2002 | 510 | 5 | 5 |
| Willow Run | February, 2003 | 500 | 11 | 15 |
| Total Units or Acres | | 19,918 | 1,641 | |

Source: Low Country Council of Governments. *Bluffton Community Strategic Plan*. February, 2002.

* Non-Residential Development includes Commercial, Office, Civic and Mixed Use Development

** Shults/Goethe Road development was a pre-existing community, which explains its lack of new

EXISTING CONDITIONS

INVENTORY OF URBAN SERVICES IN THE TOWN OF BLUFFTON

CONDITIONS IN THE STUDY AREA

DEMOGRAPHICS

Within the Buck Island/Simmons ville Road area, approximately 1,666 people reside in 574 housing units, according to the 2000 Census. In addition, the population is 47.9 percent non-white, compared with a non-white population of 36.8 percent for the current town as a whole. The average number of persons per housing unit, or average household size is 3.05, compared with the current Town household size of 2.68. Of the occupied housing units, 67 percent are owner-occupied, compared with the town's 83 percent. A summary profile of the area is presented in Table 2.

Table 2: ANNEXATION AREA CENSUS FIGURES VS TOWN OF BLUFFTON CENSUS FIGURES

| | BUCK ISLAND/ SIMMONSVILLE ROAD ANNEX AREA* | | TOWN OF BLUFFTON** | |
|--|--|---------|-----------------------|---------|
| | NUMBER | PERCENT | NUMBER | PERCENT |
| Total Population: | 1666 | | 1275 | |
| White alone | 865 | 51.9% | 806 | 63.2 |
| Black or African American alone | 684 | 41.1% | 414 | 32.5 |
| American Indian and Alaska Native alone | 0 | 0.0% | 6 | 0.5 |
| Asian alone | 4 | 0.2% | 5 | 0.4 |
| Native Hawaiian and Other Pacific Islander alone | 0 | 0.0% | 0 | 0 |
| Some other race alone | 91 | 5.5% | 40 | 3.1 |
| Two or more races | 18 | 1.1% | 4 | 0.3 |
| Average household size | 3.05 | | 2.68 | |
| Total Housing Units: | 574 | | 522 | |
| Vacant | 28 | 4.9% | 8 | 0.02% |
| Occupied | 546 | 95.1% | 514 | 98% |
| Owner occupied | 367 | 67.2% | 429 | 83% |
| Renter occupied | 179 | 32.8% | 85 | 16.5% |

Source: US Census 2000

* As defined by the 2002 US Census' "Block" category in geographic units of the annexation area.

** As defined by the 2002 Census' "Place" category for the "Town of Bluffton" in "Beaufort County." This type of geographic category is not as precise information as "Block" information for the annexation area. The "Place" of Bluffton includes parcels that are not part of the official boundaries of the Town of Bluffton municipality, but are within the general place.. More precise information is not available from the US Census.

VISUAL ANALYSIS



Fig. 4: The majority of parcels within the annexation area are residential, single-family homes.



Fig. 5: Mobile homes are common homes within the annexation area



Fig. 6: The Old Carolina Golf Course is part of the annexation area.



Fig. 7: A concrete factory currently operates within the bounds of the proposed annexation area.



Fig. 8: Office buildings are located within the new construction along the 278 corridor.



Fig. 9: This commercial development is one of the developments along the 278 corridor.

LAND USE

The Buck Island / Simmonsville Road annexation area – 516 parcels – is predominantly residential - 574 housing units; with a commercial development of 206 licensed businesses along the US Highway 278 corridor. Several light industrial developments also exist in the annexation area. The residential communities of Westbury Park and the Old Carolina Golf Course Community are within the vicinity, but are not considered part of the annexation area. (See Map 2)

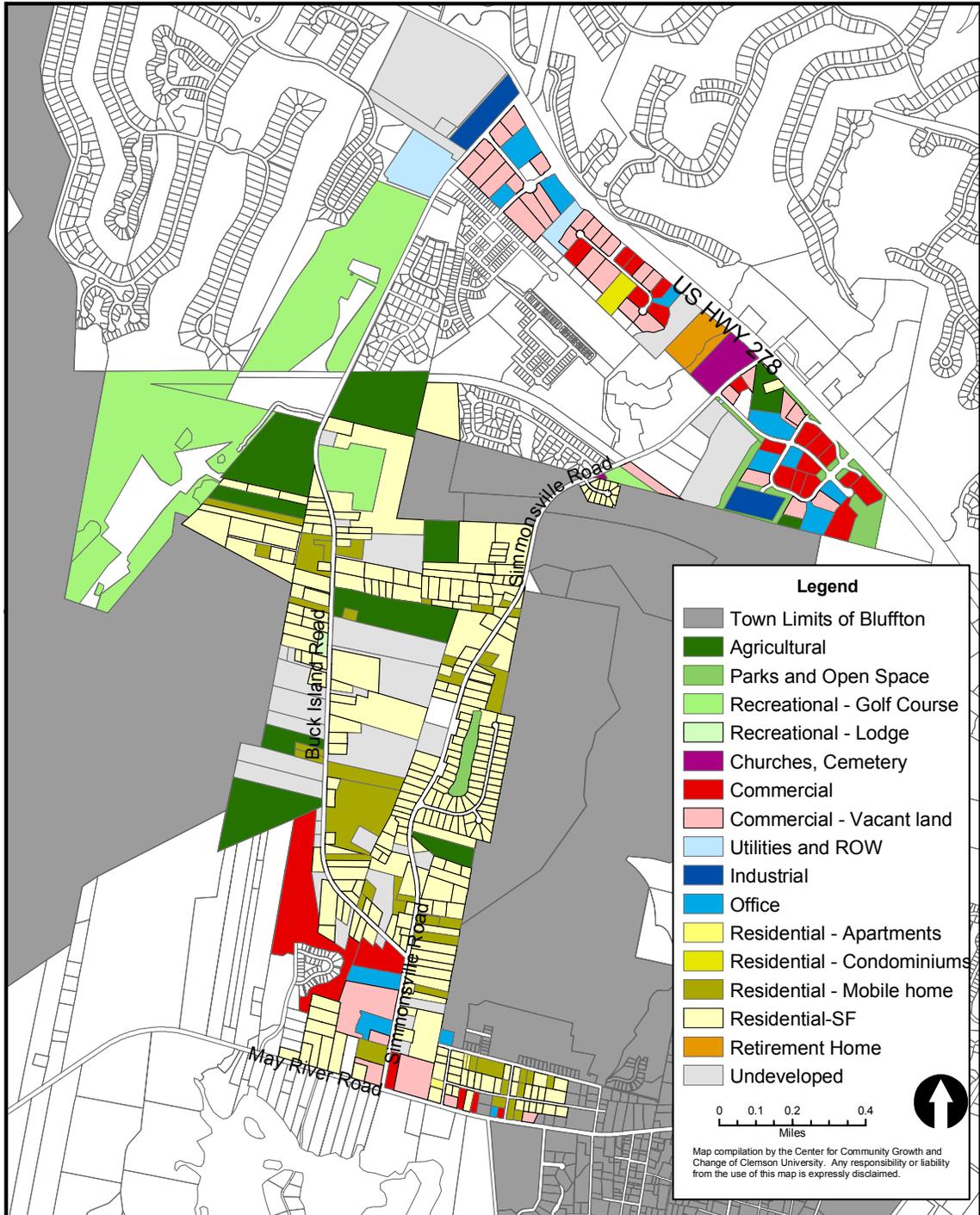
TAX RATES AND ASSESSMENT RATES

The Town of Bluffton charges an annual tax rate of 0.049 mils multiplied by the assessed value of residential and commercial properties. Assessment rates are 4% for occupied primary-residential and 6% for non-residential properties.

MAP 2: LAND USE OF ANNEXATION AREA

LAND USE MAP

Simmonsville - Buck Island Road Annexation Area



INVENTORY OF SERVICES

A typical Cost-benefit Analysis reviews all municipal services, and then classifies the associated changes that will result from the particular annexation being analyzed. Such common municipal services include:

- General government services;
- Planning, building, and land use regulatory services;
- Police protection;
- Fire protection;
- Schools;
- Hospitals;
- Water and sanitary sewer service;
- Road maintenance;
- Storm drainage improvements and maintenance;
- Sanitation service;
- Parks and recreation; and
- Street lighting.

The services are usually provided by the municipality, the county, the regional council of governments (COG), or a private organization. In the case of a cost-benefit analysis such as this study, it is important to pay close attention to the services that the municipality provided by the municipality. Of those services, the costs of service provisions will be calculated and considered an expense. For this proposed annexation, the urban services are provided as followed in Table 3:

Table 3: SERVICE PROVISION FOR THE PROPOSED ANNEX AREA

| TYPE OF SERVICE | PROVIDER OF SERVICE |
|---|--|
| General Government Services | Municipality, County, Regional Council of Government |
| Planning, Community Development, and Land Use Regulatory Services | Municipality, County, Regional Council of Government |
| Police Protection | Municipality |
| Street Lighting | Municipality |
| Fire Protection | County |
| Schools | County |
| Parks and Recreation | County |
| Stormwater Maintenance | County |
| Road Maintenance | County/State |
| Sanitation service | Private* |
| Hospitals | Private |
| Water and Sewer Service | Private |

* Sanitation services are billed by the municipality but are sub-contracted out to a private organization. It is the private firm that is responsible for staffing, salaries, truck fleet, etc.. There fore, for purposes of this study, sanitation services will be

GENERAL GOVERNMENT SERVICES

Some general government services, administrative functions, are provided at the local level handled by the Town staff.

Planning, Community Development, and Land Use Regulatory Services

The Town of Bluffton has a planning staff of four full-time employees with additional administrative and student intern support. That is a planner/citizen ratio of about 1:417. The annexation of Buck Island/Simmonsville Road Area would increase the ratio to 1:735. However, there will be increased planning activities that the planning staff will most likely need to undertake (i.e. increased zoning and codes enforcement, grant writing, environmental impact studies, and housing studies, etc.). A decision to increase planning staff would be a matter the Town Council would have to undertake.

Police Protection

Currently, the Bluffton Police Department has nine (9) full time employees, which includes one (1) police chief, one (1) school officer, five (5) patrolmen, one (1) victim's officers and one (1) detective. The department also maintains an additional five (5) reserve officers on staff. Currently there is no administrative employee for the department. Their responsibility extends to 1275 residents of an area of 47 square miles. The Capital Improvement Plan of the Town of Bluffton has implementation plans to hire an additional two (2) officers due to the protection needs of the current population.

Based on record of calls received by the Beaufort County Sheriff department, the majority of the total demand for police service in the Bluffton Area is from Buck Island / Simmonsville Road (See Table 4).

Table 4: BEAUFORT COUNTY SHERIFF DEPARTMENT CALLS FOR SERVICE IN THE BLUFFTON AREA IN 2002

| Date | Location | No. of Calls |
|-------------------------------|--------------------|---------------------|
| Jan. 3, 2002 – Jan. 24, 2003 | Simmonsville Road | 839 |
| Jan. 6, 2002 – Dec. 29, 2002 | Buck Island Road | 261 |
| Jan. 30, 2002 – Dec. 28, 2002 | Little Possum Lane | 18 |
| Jan. 1, 2002 – Sept. 26, 2002 | Goethe Road | 80 |
| Jan. 12, 2002 – Dec. 26, 2002 | Ballfield Road | 34 |
| TOTAL CALLS | | 1232 |

Source: Beaufort County Sheriff Department

According to Beaufort County Sheriff records, the Buck Island and Simmonsville Road area has reported 1,100 calls for service in 2002 and the general nature of the crimes is serious. The Bluffton police chief categorizes the top five types of crimes in the Buck Island and Simmonsville Road area as: 1) Domestic, 2) Drugs, 3) Vandalism, 4) Burglary, and 5) Shootings. Most of the crimes are reported from residential areas rather than commercial areas or businesses.

The police chief for the Town of Bluffton speculated that they currently receive an average of about 3000 calls for service per year. After annexation, the calls coming to the Town of Bluffton Police Office will approach 4,100 calls for service per year. A decision of whether or not there would be a need to increase the staff of the local police would need to be made by the Town Council.

Fire Protection

Fire protection in Bluffton is provided by the county and will consequently not be affected by the annexation of this area into the town boundary. Fire protection service relies on already existing township divisions.

School System

The Beaufort County School District provides school service for the Town of Bluffton and the proposed annexed area. The student population residing in the proposed annexation developments currently attends the Bluffton area schools. Thus, there would be no impact to the town budget, or in fact, the school district due to any per pupil cost estimates.

Hospital System

The hospital system consists of regional centers that would consequently have no impact on the local municipal budget. Additionally, emergency medical service is a county run service that does not factor into local expenditures or municipal service ratios.

Water and Sanitary Sewer Service

The Beaufort Jasper Water Sewer Authority provides water and sewer service to the annexation area and to all current town residents; therefore, annexation of the area will not change current costs to residents or to the municipality.

However, due to the rural nature of some properties, it is possible that some residents currently use a septic system for sewer needs. Although the responsibility to provide the infrastructure of water and sewer to a private residence is put on the property owner, potential environmental issues derived from improper septic tank use could burden the municipality.

Road Maintenance

The current road network within the annexation area consists of state and county roads with road maintenance provided by Beaufort County. In fact, aside from Calhoun Street, none of the streets within the municipality are maintained by the Town of Bluffton. A potential source of expenditures related to the local street system may include the future paving of roads within the annexation area, however, at this time and within the three-year scope of this study, no foreseeable improvements would fall within the control or responsibility of the Town of Bluffton, as all roads will continue to be County or state-maintained.

Storm Drainage Improvements and Maintenance



At present, the Beaufort County Public Works Department maintains storm drainage throughout the proposed annexation area. Bluffton officials and citizens have related concerns over the lack of a regular maintenance schedule for the storm water drainage system that results in areas of standing water due to clogged lines, etc.

Fig. 10: Example of standing water caused by a lack of regular maintenance of area drainage swales.

Sanitation Service

For residential uses, the Town of Bluffton contracts out solid waste pick-up to Waste Management Services. Direct private container service contracted under separate individual agreement is available to businesses.

All costs associated with residential pick-ups are included in Bluffton's tax millage. The Town of Bluffton will charge a monthly \$10.99 to all households of the annexation to them (a

\$131.88 annual expense to the household). This expense is included in the property taxes that are billed to each household.

Parks and Recreation

The Town of Bluffton has approximately 245 acres of land available for parks and recreational use¹, which calculates into a current ratio of 192 acres per 1,000 residents. Currently, Beaufort County maintains and designates park areas within the Town of Bluffton and the proposed annexation area. There is one exception in the Eagles Park, which is privately owned. The owners of the park have proposed to donate the park to the Town, which would create maintenance fees that the municipality would be responsible to pay. Exactly how much these fees would be are subject to the size of the park, the activities provided (playing fields, playground equipment, picnic areas, public restrooms, passive openspace, etc.). Further, these fees would need to be calculated before the negotiations of accepting the land.

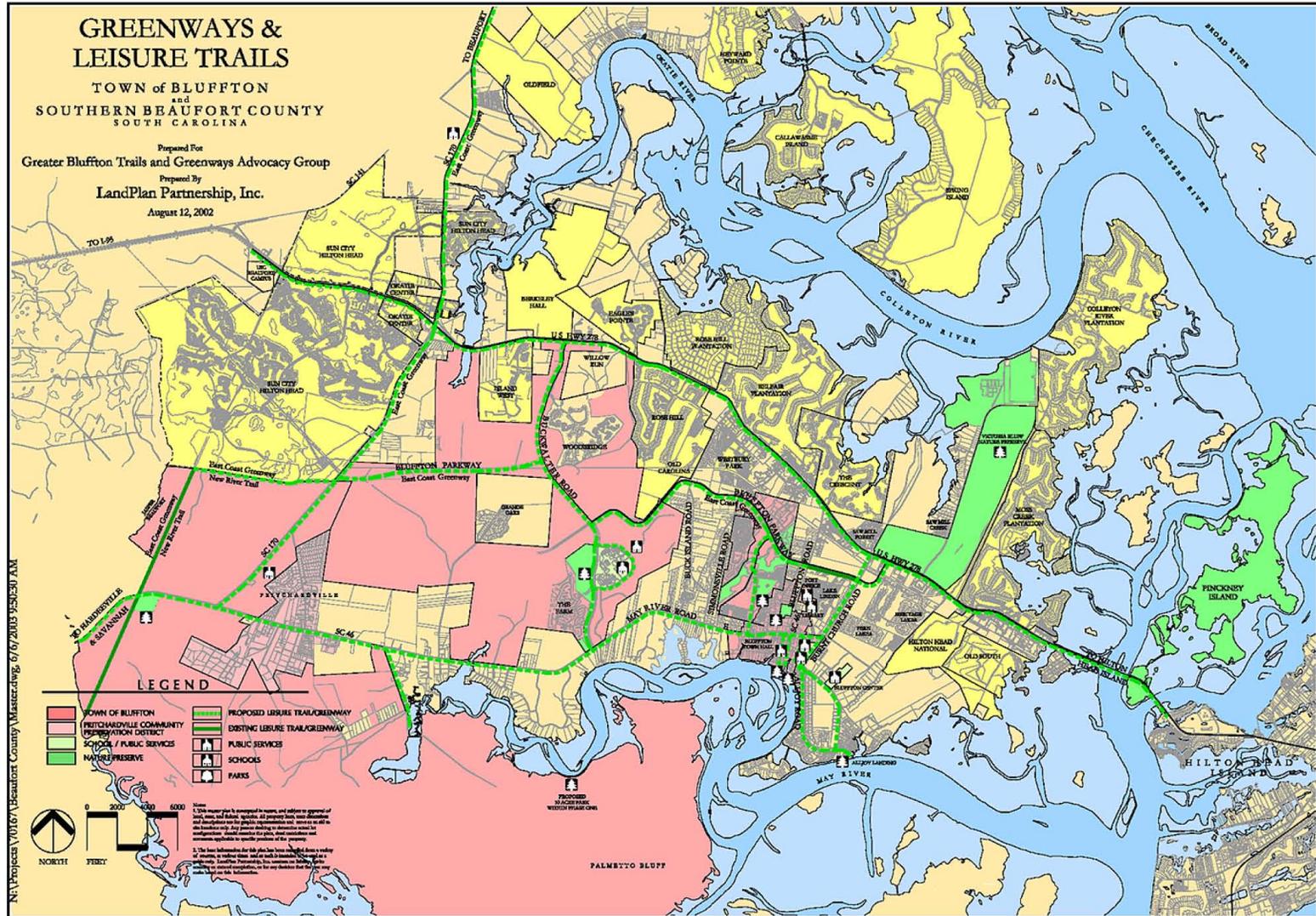
While not part of the three-year time frame of this study, the Town of Bluffton has a greenway plan which proposes two paths along Buck Island and Simmonsville Roads, with a proposed cost of \$25 per linear foot not including any right-of-way acquisition costs. Preliminary estimates suggest that according to the current plans; these paths would roughly total 26,750 linear feet (5.06 mi.) for a final cost of \$668,950. (This estimate does not include the costs of right-of-way procurement.) It is important to note that a considerable portion of the path construction could be potentially funded through federal grants. See Map 3 for details of plan.

Street Lighting

The Town of Bluffton recently put seven (7) streetlights on Goethe Road. The lights are financed at a monthly fee of \$8.47 per light. The current average operation and maintenance cost for this installation is \$6 per month per the light. Although streetlights are not immediate necessities, they should be considered a priority to be implemented within the near future for public safety concerns. In general, streetlights similar to the ones on Goethe Road should be installed at every intersection, curve, and every 200' thereafter. Preliminary estimates suggest that according to the current plans; approximately 135 lights would need to be installed within the study area. This would create a monthly charge of approximately \$1950.00.

¹ Total provided by Town of Bluffton

MAP 3: THE GREENWAYS AND LEISURE TRAILS OF THE TOWN OF BLUFFTON



Source: Community Development Dept. and Land Plan Partnership of the Town of Bluffton

IMPACTS OF ANNEXATION

ANALYSIS OF DEMOGRAPHIC CHANGES AND MUNICIPAL EXPENDITURES & REVENUES

DEMOGRAPHICS

The annexation of the Buck Island/Simmons ville annexation area will create a dramatic increase in population (57%), housing units (52%) and licensed businesses (X) for the Town of Bluffton. The following table shows the increase:

| Type of Growth | Existing | Annexation Area (Increase) | Growth (%) |
|----------------|----------|----------------------------------|---------------|
| Population | 1275 | 1666 | 131 |
| Housing Units | 522 | 574 | 110 |
| Businesses | 50 | 206 | 412 |

EXPEDITURES

Looking at the government services, police protection and solid waste protection are the only services that may have added expenditures due to the annexation of Buck Island/Simmons ville Road Area. The fiscal impacts of the provision of the services are described later in this chapter. See Tables 8 and 9 for details of the impacts of expenditures.

POLICE

There are two ways to factor a need for additional police protection within a community: level of service based on a per capita ratio of officers to population; and a level of workload based on calls and types of crimes within a community.

Currently the department is operating at a per capita ratio of 4.7 (officers): 1,000 (population)¹. With an addition of 1,666 persons in the Buck Island/Simmonsville annexation area, the ratio will change to 2.0:1,000. The goal of the Capital Improvement Plan is to increase the ratio, with the planned addition of two (2) police officers; if such action were taken, the service ratio would rise to 2.7: 1,000. The average ratio of officers to population for cities of comparable population size is 2.5:1,000. Based on per capita ratio calculations of the level of service/population ratio, there would be no immediate need for additional police officers due to annexation.

However, the level of service ratio does not reflect the level of workload that the annexation would contribute to the police forces responsibilities. As mentioned in the previous chapter, the police force should anticipate an increase of 1,100 calls from the annexation area, thus adding to the over 3,000 annual calls for service the police department already receives. The high number of calls from the annexation area as well as the severity of the types of crimes suggests a need to consider additional officers.

In addition, population levels during tourist season. Since the number of visitors fluctuates, it would be difficult to predict the ratio. This is an important detail since it is estimated that outsiders commit 80% of crimes. The following information is based on a hypothesized increase of two additional officers added to the police force due to annexation.

The estimated cost of the additional police force and equipment to patrol these areas is as follows:

¹ Calculated using total officer figure of 6, including 5 full-time patrolmen and 1 detective – see Chapter 1

Table 6: ESTIMATIONS OF THE COST OF ADDITIONAL POLICE OFFICERS

| | |
|---|-----------|
| Police officers , salary and benefits: 2 @ \$32,000 per year ¹ | \$64,000 |
| Officer equipment , including uniform, vest and revolver: 2 sets @ \$3,000 per set | \$6,000 |
| Vehicles , fully equipped: 2 @ \$30,000 per vehicle | \$60,000 |
| TOTAL | \$130,000 |

¹ average base salary of \$26,295/patrolman (uncertified) and \$28,500/patrolman (certified)

The annexation of Buck Island/Simmonsville Area will create additional burden upon the police department. The per capita ratio will still remain lower than the national standard, but this may not reflect the real performance level of the police department would the annexation occur. Being that the annexation area has higher crime statistics than the existing town, consideration of additional police officers should be considered. (See Recommendation 3 in the Recommendations section of this study.) It is up to the Town Council to decide if the current pressures of the police department, coupled with the population increase due to annexation may lead to the need for additional staff.

PLANNING, ECONOMIC DEVELOPMENT AND REGULATIONS

The per capita ratio of planners to population will increase from 1:417 to 1:735. Compared to other municipalities within the state of South Carolina, this per capita ratio would be considered quite good. However, it will almost double the per capita ratio. The annexation area will produce additional work on the planning and community development staff. Similar to the police department, a per capita analysis may not be the most accurate analysis to accurately portray the community's needs of the planning staff. The increase of additional population and workload of this annexation, combined with potential growth within other areas of Bluffton may warrant an increase of additional staff. It is up to the Town Council to decide if the future growth of Bluffton, coupled with the population increase due to the annexation of Buck Island/Simmonsville Road may lead to the need for additional staff.

SOLID WASTE COLLECTION

The significant issue facing the Town with regards to residential waste collection is a matter of timing. After annexation has occurred, the Town will immediately be responsible for the cost of collection without actually accruing any property tax revenue from the serviced properties. As stated earlier, Bluffton does not have its own Sanitation Department – a private provider, Waste

Management, under contract with the Town, handles garbage collection. As a consequence of this arrangement, the Town is not directly responsible for any capital expenditures relating to the addition of more trucks or staff¹.

Aside from capital outlays, the annual operating expense the Town will be taking on with the addition of this area must be calculated. Taking the conservative estimate from approximated census data, the estimated number of units proposed for annexation is 574². Factoring that by the monthly household unit bill of \$10.99³, the calculated total annual garbage collection cost is \$75,700.

It is important that Waste Management Services is informed of the timeframe of annexation in order to provide seamless service and billing.

REVENUES

The total projected property tax revenues⁴ from the various land uses within the proposed annexation area is approximately \$510,278. However, it is important to realize that a lag exists between the subsequent service responsibilities/costs and the actual revenue collection. In fact, it may take at least a year for the Beaufort County Tax Assessor's Office to legally process and administer the annexation procedure to add these properties to the Town tax rolls. Consequently, as a conservative approach, each funding timetable estimates a one (1) year lag between service provision and revenue generation.

In this analysis two scenarios are illustrated to allow for a clearer picture of the many variables affecting Town annexation. This multiple scenario summary will allow decision makers

¹ Rate increases due to increases in provider's capital and operating expenditures are not foreseen, at this time, due to current excess capacity as reported by Services representative

² Under the contract with the Town of Bluffton, Waste Management Services provides service for residential properties only. Businesses make their own contracts for waste collection

³ Household unit service fee reported by Town of Bluffton Planning Department

⁴ Total revenue calculations are based on projected assessed values for 2004 from Beaufort County Tax Assessor and provided by the Town of Bluffton

to review both conservative revenue estimates, as well as gain an understanding of the additional benefits that the annexation may offer. Costs for both scenarios remain constant.

Scenario One (See Table 8)

This scenario calculates the revenue stream generated only as a function of the additional property taxes produced by the annexation of the owner-occupied residential and commercial properties of the proposed annexation area. (Table 8) One-year lag in revenue is assumed. The calculated cost-benefit is as follows:

- Year 1: \$252,168 in costs with \$0 in revenue
 - Net (year 1): **-\$252,168**
- Year 2: \$507,336 in costs with \$438,798 in revenue
 - Net (year 2): **-\$68,538**
- Year 3: \$282,768 in costs with \$438,798 in revenue
 - Net (year 3): **+\$156,030**
 - **Net (Total): -\$164,716**

Scenario Two (See Table 9)

This scenario calculates town revenue as a combination of both property tax revenue and an estimate of several other population dependent Town revenue sources. (Table 9) This approach illustrates the additional revenue impacts the annexation may provide. Using budget estimates provided by the town of Bluffton, additional revenue figures (i.e. business license fees, police fines, etc.) were calculated for the annexation area based on the methodology described in Chapter 2.

- Year 1: \$252,168 in costs with \$64,174 in revenue
 - Net (year 1): **-\$187,994**
- Year 2: \$507,336 in costs with \$876,036 in revenue
 - Net (year 2): **+\$368,700**
- Year 3: \$282,768 in costs with \$876,036 in revenue
 - Net (year 3): **+\$593,268**
 - **Net (Total): +\$773,974**

Table 7: ANNEXATION REVENUE COMPUTATIONS

TABLE 10
COMMUNITY DEVELOPMENT DEPT'. PERSONNEL NEEDS

| POSITION ASSUMPTIONS | SALARY EXPENDITURES ¹ | | | | TOTAL COST |
|--------------------------------|----------------------------------|------------------|------------------|------------------|------------------|
| | FY 2003 | FY 2004 | FY 2005 | FY 2006 | |
| Code Enforcement Officer 1 | \$17,710 | \$17,710 | \$17,710 | \$17,710 | \$36,800 |
| Code Enforcement Officer 2 | | | | | |
| Business License Administrator | \$35,650 | \$35,650 | \$35,650 | \$35,650 | \$36,800 |
| Planning Technician | | \$36,800 | \$36,800 | \$36,800 | |
| Zoning Administrator | | \$32,200 | \$32,200 | \$32,200 | \$27,600 |
| Business License Clerk | | | \$27,600 | \$27,600 | |
| PERSONNEL TOTALS | \$53,360 | \$122,360 | \$149,960 | \$186,760 | \$512,440 |

NOTE: Planning Tech, 2nd COE and Bus. License Clerk currently included in Town's Five Year Personnel Projection; however, with annexation personnel will be needed sooner

1 Salary figures include a calculation of benefit package @ 15 percent

Table 8: ESTIMATED REVENUE SCENARIO ONE

TABLE 8
ESTIMATED NET REVENUE WITH ANNEXATION (Scenario One)

| EXPENDITURES | BUDGET REQUIREMENTS | | TOTAL COST Year 1 | TOTAL COST Year 2 | TOTAL COST Year 3 |
|---|---------------------|--------------------------------|---------------------------------|--------------------------------|------------------------------|
| | Capital Costs | First Year Operational Cost | | | |
| Departments | | | | | |
| Police Department | \$66,000 | \$64,000 | \$130,000 | \$64,000 | \$64,000 |
| Solid Waste Collection | \$0 | \$75,700 | \$75,700 | \$75,700 | \$75,700 |
| Community Development ¹ | | \$53,360 | \$53,360 | \$122,360 | \$149,960 |
| Payback to Reserve Fund | | | | \$259,060 | \$82,322 |
| TOTAL BUDGET EXPENDITURES | | | \$259,060 | \$521,120 | \$371,982 |
| REVENUE | | | | | |
| ESTIMATED PROPERTY TAX INCOME (1st year after annexation, Table 1) | | | \$0 | \$438,798 | \$438,798 |
| NET REVENUE TO TOWN (1st year) | | | (\$259,060) ² | (\$82,322) ² | \$66,816 ² |

¹ See Table 10, data provided by Town of Bluffton Community Development Dep't.

² Figures based on solely on property tax revenues, and do not include anticipated revenues from business license or franchise fees, police fines, etc.

Table 9: ESTIMATED REVENUE SCENARIO TWO

TABLE 9
ESTIMATED NET REVENUE WITH ANNEXATION (Scenario Two)

| EXPENDITURES | BUDGET REQUIREMENTS | | TOTAL COST Year 1 | TOTAL COST Year 2 | TOTAL COST Year 3 |
|---|---------------------|--------------------------------|----------------------|----------------------|----------------------|
| | Capital Costs | First Year Operational Cost | | | |
| Departments | | | | | |
| Police Department | \$66,000 | \$64,000 | \$130,000 | \$64,000 | \$64,000 |
| Solid Waste Collection | \$0 | \$75,700 | \$75,700 | \$75,700 | \$75,700 |
| Community Development ¹ | | \$53,360 | \$53,360 | \$122,360 | \$149,960 |
| Payback to Reserve Fund | | | | \$252,168 | |
| TOTAL BUDGET EXPENDITURES | | | \$259,060 | \$514,228 | \$289,660 |
| REVENUES | | | | | |
| ESTIMATED PROPERTY TAX INCOME (1st year after annexation, Table 1) | | | | \$510,278 | \$510,278 |
| Estimated business license revenue (1st year after annexation) | | | | \$259,873 | \$259,873 |
| Estimated franchise fee revenue | | | | \$41,711 | \$41,711 |
| Estimated fee/fine revenue | | | \$64,174 | \$64,174 | \$64,174 |
| ESTIMATED TOWN REVENUE | | | \$64,174 | \$876,036 | \$876,036 |
| NET REVENUE TO TOWN (1st year) | | | (\$194,886) | \$361,808 | \$586,376 |

¹ See Table 10, data provided by Town of Bluffton Community Development Dep't.

Table 10: COMMUNITY DEVELOPMENT DEPARTMENT REPORTED NEEDS

TABLE 10
COMMUNITY DEVELOPMENT DEP'T. PERSONNEL NEEDS

| POSITION ASSUMPTIONS | SALARY EXPENDITURES ¹ | | | | TOTAL COST |
|--------------------------------|----------------------------------|------------------|------------------|------------------|------------------|
| | FY 2003 | FY 2004 | FY 2005 | FY 2006 | |
| Code Enforcement Officer 1 | \$17,710 | \$17,710 | \$17,710 | \$17,710 | \$36,800 |
| Code Enforcement Officer 2 | | | | | |
| Business License Administrator | \$35,650 | \$35,650 | \$35,650 | \$35,650 | \$36,800 |
| Planning Technician | | \$36,800 | \$36,800 | \$36,800 | |
| Zoning Administrator | | \$32,200 | \$32,200 | \$32,200 | \$27,600 |
| Business License Clerk | | | \$27,600 | \$27,600 | |
| PERSONNEL TOTALS | \$53,360 | \$122,360 | \$149,960 | \$186,760 | \$512,440 |

NOTE: Planning Tech, 2nd COE and Bus. License Clerk currently included in Town's Five Year Personnel Projection; however, with annexation personnel will be needed sooner

1 Salary figures include a calculation of benefit package @ 15 percent

Table 11: COMPARATIVE SUMMARY OF RESIDENTIAL AND COMMERCIAL PROPERTY

TABLE 11
COMPARATIVE SUMMARY OF COSTS AND REVENUES
 RESIDENTIAL VERSUS COMMERCIAL PROPERTY

| RESIDENTIAL | YEAR 1 | YEAR 2 | YEAR 3 | TOTAL (3 YR Period) |
|--|--------------------|-------------------|-------------------|------------------------|
| Costs | | | | |
| Solid Waste Collection | \$68,808 | \$68,808 | \$68,808 | |
| Police Department ¹ | \$86,667 | \$42,667 | \$42,667 | |
| Government Administration ² | \$17,710 | \$52,210 | \$52,210 | |
| Total Costs | \$173,185 | \$163,685 | \$163,685 | |
| Revenues³ | | | | |
| Property Tax | \$0 | \$68,876 | \$68,876 | |
| Franchise Fees | \$0 | \$27,807 | \$27,807 | |
| Additional Fees and Fines | \$42,783 | \$42,783 | \$42,783 | |
| Total Revenues | \$42,783 | \$139,466 | \$139,466 | |
| NET TOTAL | (\$130,402) | (\$24,219) | (\$24,219) | (\$178,839) |
| COMMERCIAL | | | | |
| Costs | | | | |
| Police Department ¹ | \$43,333 | \$21,333 | \$21,333 | |
| Government Administration ² | \$35,650 | \$70,150 | \$97,750 | |
| Total Costs | \$78,983 | \$91,483 | \$119,083 | |
| Revenues³ | | | | |
| Property Tax | \$0 | \$369,922 | \$369,922 | |
| Franchise Fees | \$0 | \$13,904 | \$13,904 | |
| Business License Taxes | \$0 | \$259,873 | \$259,873 | |
| Additional Fees and Fines | \$21,391 | \$21,391 | \$21,391 | |
| Total Revenues | \$21,391 | \$665,090 | \$665,090 | |
| NET TOTAL | (\$57,592) | \$573,607 | \$546,007 | \$1,062,022 |

1 Police department costs calculated as a percent share of previous cost figures - 66.7% and 33.3% for residential and commercial, respectively

2 See Table 10 - positions directly attributable to specific land use were wholly assigned to the relative category (i.e. Business License Admin. to commercial); however, where position responsibilities were shared by both uses, the salary cost was calcu

3 Franchise fees and additional fine revenues calculated as percent share of previous revenue figures - 66.7% for residential and 33.3% for commercial

NOTE: The use of percent share calculations is based on methodological approach of calculating service population as 100% residential population and 50% employee population, thus resident population serves as a weighting factor of two-thirds (or 67.7%)

CHAPTER III

RECOMMENDATIONS

Both Cost-benefit scenarios analyzed regarding the Buck Island / Simmonsville Road Annexation area illustrate a positive net benefit. Within the scope of the financial considerations addressed in this study, the annexation of the study area will bring approximate net revenue to the town in the range of \$550,000 and \$1,300,00. Therefore, the annexation of this area is recommended as a mutually beneficial course of action for both the area residents and the Town.

Furthermore, the following issues need to be considered about the annexation area that cannot be evaluated by a Cost-benefit Analysis due to their qualitative nature. Recommendations thus further highlight the implications of these additional factors.

RECOMMENDATION 1:

CONDUCT ENVIRONMENTAL IMPACT STUDIES

Several locations within the Buck Island/Simmonsville Annexation Area are potentially damaging the wetland areas where they are located. Specific areas include (but are not limited to) industrial properties such as the cement plant and the auto yard. If these areas are annexed into the Town of Bluffton, the municipality could become responsible for their cleanup in the future. Environmental Impact Studies could benefit the Town of Bluffton by assessing the current conditions of these areas. An estimate of clean up costs should be viewed as long-term expenses in the consideration of annexation of these properties.



Fig. 5: Vacant property located along Simmonsville Road with sign describing it as industrial land

RECOMMENDATION 2:**DEVELOP A HOUSING PLAN**

A housing plan for the Town of Bluffton could create opportunities for additional federal financing options. A housing plan is a study that approaches the housing in a general area to address its particular problems (i.e. deterioration, affordability, design standards, etc.) The cost of a housing plan is dependent on the extent of study that will be performed, which can range from a quick “windshield survey” to a detailed market analysis. etc. A housing plan has two general phases: 1) To define the objectives, establish priorities, and identify resources regarding the housing in the study area; and 2) Determine the specific management of those resources including the development of the guidelines, regulations for the study area as well as the implementation of service delivery systems. Considering the general condition of the housing stock in the Buck Island/Simmonsville Annexation Area, a housing plan dedicated to improvements to the current housing stock could be a tremendous asset to the community.

RECOMMENDATION 3:**EVALUATE THE STAFFING NEEDS OF POLICE DEPARTMENT IN TERMS OF WORKLOAD**

Per capita ratios based on national multipliers have determined that the current staff levels can still be sufficient with the annexation of the Buck Island/Simmonsville Road annexation area. However, additional studies must be taken to determine the actual needs of the community. The annexation of the study area will double the Town’s population with a community that experiences higher crime than the existing town. This will increase the workload of the police staff and could have a negative effect on department’s abilities to respond and serve the community. In the case of the Town of Bluffton, a workload analysis could reveal more accurate results than this study’s per capita ratio analysis.

RECOMMENDATION 4:**EVALUATE THE STAFFING NEEDS OF THE COMMUNITY DEVELOPMENT AND PLANNING DEPARTMENT**

Although the annexation of Buck Island/Simmonsville Road area does not directly pose a large burden on the Community Development and Planning Department of the Town of Bluffton based on per capita multipliers, further studies should be conducted to determine the workload of the planning staff from the combination of permitting, development agreements, infrastructure needs and community development needs due to the growth and development of annexation of the past five years. The need for additional staff would be an asset in order to efficient permitting and development services and maintain preparedness for long-term planning.

RECOMMENDATION 5:**EVALUATE THE STAFFING NEEDS OF THE ADMINISTRATIVE DEPARTMENT**

The annexation of Buck Island/Simmonsville Road area will pose an immediate and large burden on the Business Licensing of the Town of Bluffton based on the amount of new businesses that would be annexed combined with the future needs of growth within the town. A Business License Administrator should be hired at the time of annexation. Other administrative staffing needs should be evaluated to determine if additional staff would be necessary within a 5-year horizon.

RECOMMENDATION 6:**CONSIDER LONG-TERM INFRASTRUCTURE REQUIREMENTS**

Long-term plans that are being implemented by the existing plan of Bluffton will have to be applied to the Buck Island/Simmonsville Annexation Area if annexed. The costs of implementation, though long-term (more than 3 years) need to be considered. Examples of long-term infrastructure requirements would be greenway paths in accordance to the greenway plan and street lighting. Street lighting should be especially considered for sooner implementation for public safety concerns. Estimations of these infrastructure costs are within the text of the report (See the *Existing Condition* section of the study).

RECOMMENDATION 7:

CREATE A TIMELINE FOR ANNEXATION

The creation of a timeline for annexation can be beneficial in order to minimize a costly lag time between the time the annexation occurs and the time that expenses will occur. Making sure that stakeholders, such as the Waste Management, are aware of the timeline with enough response time to provide service at the desired time will ensure a smooth implementation of services to the annexation area .

RECOMMENDATION 8:

UPDATE TOWN OF BLUFFTON'S BUSINESS LICENSE CODE FEE SCHEDULE

In order to make more accurate estimations of revenue that can be acquired through business fees, an update of the business code fee schedule would be necessary. Ideally, a schedule that reflects the codes of the Town of Hilton Head Island schedule would be the most beneficial update.

METHODOLOGY

A TEMPLATE FOR COST-BENEFIT ANALYSIS OF ANNEXATION

This report presents the methodology and general assumptions used in the Cost-Benefit Analysis of the Buck Island/Simmonsville Road Annexation. This analysis consists of a series of calculations that, based on certain assumptions, project the magnitude of increased Town service costs and offsetting revenues that can be expected as a result of an annexation.

This study uses 2003 values without any present value computation for either costs or benefits. This approach is a realistic assessment due to the short (3 yr.) time frame under review and the national economy's current low interest rates.

REVENUE CALCULATIONS

Property taxes are a significant source of General Fund revenue that will increase as a direct result of annexations into the Town of Bluffton. The cost of annexation is calculated by researching county tax records from the Beaufort County Tax Assessor's Office to determine:

- 1) The appraised value and use of all properties within the proposed annex area;
- 2) The assessment ratio for each of these parcels (based on commercial / non-commercial (owner occupied residential) use, 6% and 4% respectively); and
- 3) The assessed value of each parcel.

Once the assessed values are determined, the totals are factored by the Town's tax rate (0.049 mil) to determine the "annual unit tax bill."

As an example, the tax on a \$100,000 owner-occupied home is calculated as follows:

| | |
|---------------|-----------------------------------|
| \$100,000 | Appraised Value |
| <u>x 0.04</u> | Assessment Ratio (owner-occupied) |
| \$4,000 | Assessed Value |

| | |
|---------------|-------------------------------|
| \$4,000 | |
| <u>x .049</u> | Town of Bluffton Millage Rate |
| \$196 | Tax Bill to Town |

This calculation determines both the additional town revenue from annexation, as well as the additional cost to residents above the current unincorporated Beaufort County tax rate. (approx. 25 percent increase)

While slightly more involved, a similar process is followed with respect to personal property. Researching the appropriate tax records, an average appraised value of vehicles can be calculated for the district. This total can then be factored by an assessment ratio, which is an estimated share of personal property as a percent of real property value. This dollar amount is then run through the above calculations to compute total revenue from personal property taxes.

Since the millage rate for the Town consists of an additional 49 mil levy on real and personal property, real property taxes and personal property taxes can then be combined to determine the approximate cost of annexation to incoming property owners as well as establishing the projected revenues to the Town.

ADDITIONAL REVENUES

Some of the calculations of additional revenue require more approximate figures as an estimation of the impacts to Town revenue. An estimated number of the study area residents and employees is used to estimate the overall “service population.” This assessment uses the service population, as an indicator of the relative demand the proposed annex will create for certain municipal services. Unless otherwise noted, the service population is defined as 100 percent of project residents plus 50 percent of project employees, and is intended to account for the fact that local employment contribute to the City’s daytime population, and thus contribute to demand for services.

Counting local workers as equivalent to one-half of a resident is a commonly accepted practice in cost-benefit analysis to reflect the reduced demand for services created by workers as opposed to residents.¹

FRANCHISE FEE REVENUES

The Town of Bluffton collects fees from service providers who are granted franchises to provide services within the Town, including the gas, electric, and water and sewer. Franchise fees are calculated as a percentage of revenues (SCE&G pays five percent of gross electric and gas receipts, Beaufort Jasper Water Authority pays five percent of gross water/sewer receipts, and Hargray currently pays three percent for gross cable receipts); therefore, as the number of customers for these services grows, franchise fee revenues will also grow. Without the ability to directly estimate the amounts of revenues that the annex will generate for the franchise providers, this analysis uses average “per service population” figures to estimate increases in franchise fees. Based on population and employment estimates from the 2000 U.S. Census, the estimated franchise fee revenue is \$19.82 per service population (see preceding definition of service population).

BUSINESS LICENSE TAXES

Within the Town of Bluffton, businesses pay an annual tax, based on gross receipts. It is very difficult to accurately estimate future business license tax revenues, since gross receipts can vary greatly, depending not only on the size of a business establishment, but also on the types of activities that are undertaken within the Town. This analysis uses the current per employee Business License Tax revenue figure to project the future increase that might be attributable to the annexation, based on projected employment. Current revenues and estimated town employment yield average Business License Fee Revenue of approximately \$297 per employee.

BUILDING PERMITS

Examining the revenue stream generated by building permits also varies significantly depending on the nature of the annex area. Most significant is the percentage of vacant

¹ Bay Area Economics, *Livermore General Plan Update: Fiscal Impact Model Alternatives Analysis*. 2003

developable land within the area, the amount of growth pressure, and the condition of the housing stock. If a small amount of land were available for development, then one would assume no appreciable amount of building permit revenue would be accrued. The condition of the housing stock helps to identify the potential increase in renovation and redevelopment building permit applications.

ADDITIONAL FEES AND FINES

Local income from fines can be expected to increase as a proportionate share of the town population.¹ Accordingly, to gain an estimate on the additional revenue generated by the collection of fees and fines, an average costing method is a useful approach to establish existing per capita averages for the municipality. This average may then be factored by the estimated population influx to determine projected revenue increases attributable to these annexed residents. For example, dividing the 2003 budget year line item totals for the associated fees (application fees², and police fines³) by the total population figure as calculated by estimating 2002 town population from Census state projections⁴ produces an average per capita estimate for these fees at approx. \$38.52 per person.

COST CALCULATIONS

The cost calculations of this study rely mostly on the projections of those who are most acquainted with the service levels of the various municipal service providers: local officials and informed department heads. Accordingly, this fiscal impact analysis begins with interviews of the officials and service providers to create a case-study methodological approach. In this particular study, both the garbage collection service and initial police department costs draw from this method. After the data are gathered during interviews, the study's cost side examination

¹ Burchell, Robert W., David Listokin, et al. *Development Impact Assessment Handbook*. Washington, D.C.: ULI-the Urban Land Institute, 1994

² see Town of Bluffton 2003 Budget – detailed revenue

³ fine revenue factored by estimated 20 percent resident share

⁴ total population for SC as of July 2002 was projected as 4,107,183 with Bluffton proportionate total as 1298 persons

identifies all impacted systems, and then evaluates any deficiencies, as well as excess capacities, according to service level ratios and per capita figures. This form of average cost estimation was used particularly in examining open space and municipal personnel figures as related to planning standards. Consequently, within this study, a combination of the per capita and the case study method was used to project costs related to the proposed annexation. It is recommended that a similar approach be used for subsequent analysis of future annexations, so as to link perceived needs with actual existing and projected needs.

AVERAGE COST STANDARDS

FULL-TIME MUNICIPAL PERSONNEL (ADMINISTRATIVE AND PLANNING)

According to planning standards introduced in the Development Impact Assessment Handbook (The Urban Land Institute, 1994), a common ratio for general government personnel to population is 10.9 per 10,000 population for a municipality the size of Bluffton (less than 50,000). Factoring the current city staff (excluding public works and police) of 15 employees by the town population of 1275, the resulting service ratio exceeds the minimum standards with a comparative proportion of 118 per 10,000. It is important to note that a certain minimum level of personnel is needed to provide administrative support for any municipality. Due to the current small size of the Town, a ratio share analysis may provide a slightly amplified comparison. It is important to note that this analysis does not take into consideration the dramatic long-term population growth that will be occurring within the entire town beyond the four-year time span of this study. In this case, a cost-benefit analysis is limited to the annexation study area's potential for growth, costs and revenues and it only determines the per capita ratio change due to the annexation of Buck Island/Simmonsville Road area. A larger study would need to be conducted to evaluate the personnel needs of the Town due to the development of the other previously annexed areas. (See Recommendation 4 in the Recommendations section of this study.)

OPEN SPACE

According to the standards published in the "Recreation, Park and Open Space Standards and Guidelines," a park system, at a minimum, should be composed of a "core" system of parklands, with a total of 6.25 to 10.5 acres of developed open space per 1,000 population. The size and amount of "adjunct" parklands will vary from community to community but must be taken into

account when considering a total, well-rounded system of parks and recreation areas. The various types of parkland components that may be found in a community or region are found in Table 5.

Currently, the Town of Bluffton has approximately 245 acres of land available for parks and recreational use¹, which calculates into a current ratio of 192 acres per 1,000 residents. Much of these acres are parts of large developments that have included openspace with the anticipation of future growth within twenty years' time. Therefore, the acres/residents ratio is not reflective of the population growth that the Town of Bluffton will be experiencing in a relatively short amount of time.

Table 5: NRPA Open Space Standards

| Component | Use | Service Area | Desirable Size | Acres/1,000 Pop. |
|--------------------------------|--|--|----------------|------------------|
| Mini-Park | Specialized facilities that serve a concentrated or limited population or specific group such as children or senior citizens. | Less than 3-mile radius | 1 acre or less | .25 to .5 acres |
| Neighborhood Park / Playground | Area for intense recreational activities, such as field games, court games, crafts, playground apparatus area, skating, picnicking, wading pools, etc. | 3 to 2-mile radius to serve a population up to 5,000 | 15+ acres | 1.0 to 2.0 acres |
| Community Park | Area of diverse environmental quality. May include areas suited for intense recreational facilities, such as athletic complexes, large swimming pools. May be an area of natural quality for outdoor recreation, such as walking, viewing, sitting, picnicking. May be any combination of the above, depending upon site suitability and community need. | Several neighborhoods, 1 to 2-mile radius | 25+ acres | 5.0 to 8.0 acres |

Source: National Recreation and Park Association. "Recreation, Park and Open Space Standards and Guidelines", 1983.

¹ Total provided by Town of Bluffton.