

**RESEARCH OUTLINE  
FOR THE ANALYSIS OF  
TOWN - COUNTY  
VOLUNTARY SETTLEMENT AGREEMENTS  
WHICH INCLUDES A BOUNDARY CHANGE  
(§15.2-3400, et seq, Code of Virginia)**

**STAFF  
COMMISSION ON LOCAL GOVERNMENT  
COMMONWEALTH OF VIRGINIA  
December 13, 2000**

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## PREFACE

In the utilization of this research outline the following ~~points~~ should be noted

1. In initiating a request for the Commission on Local Government to review a proposed agreement defining annexation rights, local governments are guided principally by the Commission's Rules of Procedure, 1984 Edition. While those rules anticipate that the submission by the local governments will be fully responsive to relevant matters, the local governments are permitted to submit such data, exhibits, documents, or other supporting materials as they deem appropriate (Rules 3.11 and 3.13) Thus, local governments are afforded latitude in their collection and submission of data for the Commission's review.
2. The data required by this research outline will be derived from submissions presented by both of the affected localities.
3. While the initial submissions by the parties should be as comprehensive as possible, they are not required to address all of the data elements included in this research outline. Localities may submit supplemental filings "where such are deemed necessary or appropriate by the Commission for the provision of current and complete data." (Rule 3.28) Thus, supplemental filings may be utilized for the submission of data not available at the time of the initial filing.
4. The research outline was developed over the course of a number of years as a tool to assist the staff of the Commission on Local Government to evaluate proposed agreements defining town annexation rights. The elements contained therein are examples of data the Commission's staff has requested to be provided by parties initiating reviews of such agreements in the past.
5. It is understood that capacity of a town to respond to any or all of the data elements in the research outline is directly related to a number of factors, such as the population of the locality, size of its municipal staff and budget, services offered to its citizens, etc.
5. The research outline is not intended to be all encompassing of every possible factor available for the evaluation of agreements defining annexation rights. Every agreement has unique aspects that cannot be captured in a standardized outline.
6. It is not required that a town respond to data elements in the outline that would be more appropriately addressed by the affected counties.
7. In this outline, a "\*" indicates data or information requested may not be available for any or all towns.
8. If you have any questions concerning the content of the research outline or the meaning of specific items, you are encouraged to contact the staff of the Commission on Local Government at 804-786-6508.

Issue: \_\_\_\_\_

I. PROCEEDINGS OF COMMISSION

[SECTION I IS FOR USE BY COMMISSION STAFF ONLY]

- A. Date of Official Filing:  
(give date of receipt of notice)
- B. Scope of Action Filed:  
(give nature of action and amount of territory involved)
- C. Preliminary Action by Commission:  
(give date of initial Commission meeting on issue and action taken)
- D. Original Schedule for Review:  
(give original review schedule established by Commission)
- E. Changes of Schedule (if any):  
(note any changes made after by Commission and give reason for changes)
- F. Mediation Effort:  
(did Commission appoint mediator; when)
- G. Affected Jurisdictions Notified/Invited to Testify:  
(give number of jurisdictions given notice of action by initiating party)
- H. Public Hearing
  - 1. Location and Date
  - 2. Number of Persons Attending and Testifying:
- I. Date of Closing of Record:
- J. Other Relevant Factors:  
(cite any other factors relevant to the Commission's review)

II. GENERAL CHARACTERISTICS OF LOCALITIES AND AFFECTED AREAS

A. Annexing Town

1. Founding and History:  
(give date of founding and initial incorporation; briefly list major political and economic events affecting development)
2. Population
  - a. Number  
(give current population; give change and percent of change during decade preceding last census; show change and percent of change since last decennial census)
  - b. Age Distribution:  
(give median age and percent of population 65 and over at last census; compare with same data for preceding decennial census; compare with Statewide data)\*
  - c. Income  
[give median family income; give per capita adjusted gross income (AGI); compare with Statewide data]\*
3. Land Area  
(give area of locality in square miles)
4. Density of Population:  
(give population density of locality in persons per square mile based on latest population estimate)
5. Land Use Data
  - a. Distribution of Land Among Use Categories:  
(give acreage and percent of land in each land use category)

Acreage

Percent

Residential

Commercial

Industrial

Public and  
Semi-public

Vacant

Other (List)

- b. Analysis of Vacant Land:  
(give gross amount vacant land; identify amount and percentage of vacant land restricted in development potential by each environmental factor; list other properties restricted in development potential and state reason)
  - 6. Annexation History:  
(review annexation history; identify the two most recent annexations and specify amount of land area and population incorporated into the town as a result of each)
- B. Affected County
- 1. Founding and History:  
(give date of founding; briefly list major political and economic events affecting development)
  - 2. Population
    - a. Number:  
(give current population; give change and percent of change during decade preceding last census; show change and percent of change since last decennial census)
    - b. Age Distribution:  
(give median age, percent of population 18 and under, and percent 65 and over at last census; compare with same data for preceding decennial census; compare with Statewide data)
    - c. Income:  
(give median family income; give per capita AGI; compare with Statewide data)
    - d. Towns  
(list incorporated communities in county and population of each at time of last decennial census)
  - 3. Land Area:  
(give area of locality in square miles)
  - 4. Density of Population:  
(give population density in persons per square mile based on the latest population estimate; give population density for unincorporated portion of county in persons per square mile based on last decennial census and latest population estimate)

5. Employment Profile

- a. Nonagricultural Wage and Salary Employment:  
(give most recent data; give data for the fifth previous year; note change during period)
- b. Nonresident Workers/Commuting Patterns:  
(give data on nonresidents working in county; identify top three localities of such nonresident workers)
- c. County Residents Working Outside County/Commuting Patterns:  
(give data on county residents working in other jurisdictions; identify top three localities of such employment)

6. Land Use Data

- a. Distribution of Land and Use Categories:  
(give acreage and percent of land in each land use category)

	<u>Acreage</u>	<u>Percent</u>
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Residential

Commercial

Industrial

Public and  
Semi-public

Vacant

Other (List)

7. Agricultural Operations:  
(give data on number of farms in county, aggregate acres farmed, and value of most prominent agricultural product)
8. Forestral Operations:  
(give data on size and significance of forestal activities in county)

C. Area Proposed for Annexation (APA)

1. Land Area:  
(give geographic size of APA; indicate percentage of county's total land area in APA)
2. Population:  
(give population of APA; indicate percentage of county's total population in APA; indicate date of population estimate)

3. Density of Population:  
(give population density of APA in persons per square mile)
4. Property Assessables:  
(give total of assessed values ~~each~~ each major category of property in APA; indicate the percentage of county total of each category of property in the APA; indicate date of assessed values estimate)

5. Land Use Data

- a. Distribution of Land Among Use Categories  
(give acreage and percent of land in each land use category)

	<u>Acreage</u>	<u>Percent</u>
Residential		
Commercial		
Industrial		
Public and Semi-public		
Vacant		
Other (List)		

- b. Analysis of Vacant Land:  
(give gross amount of vacant land; identify amount and percentage of vacant land restricted in development potential by each environmental factor; list other properties restricted in development potential and give reason)

6. Nature of Current Development:  
(describe the major development in area, listing major industries, commercial areas, subdivisions, county-owned facilities, and municipally-owned facilities)

### III. BEST INTEREST OF THE TOWN

#### A. Need Of Town For Land For Development

##### 1. Vacant Land

- a. Gross Vacant Land:  
(give gross amount of vacant land in town in acres; state as percent of total land area in town)
- b. Net Developable Vacant Land:  
(give amount of vacant land restricted in development potential by each major environmental constraint; cite other vacant property restricted in development potential by other specified factors; give total vacant land suitable and available for development)

##### 2. Land for Industrial Development

- a. Gross Vacant Property Zoned for Industrial Development:  
(give amount of vacant property in town zoned for industrial usage)
- b. Net Developable Vacant Property Zoned for Industrial Development:  
(give amount of vacant property in town zoned for industrial activity but restricted in development potential by specified factors; give net developable vacant property zoned and suitable for industrial usage)
- c. Premium Industrial Property:  
(give number of sites and aggregate acreage of developable vacant property located on parcels of ten acres or more zoned for industrial usage)
- d. Industrial Development Adjacent to Town:  
(cite available data regarding extent of and potential for industrial growth in areas adjacent to the town)

##### 3. Land for Commercial Development

- a. Gross Vacant Property Zoned for Commercial Development:  
(give amount of vacant property in town zoned for commercial development)
- b. Net Developable Vacant Property Zoned for Commercial Development:  
(give amount of vacant property in town zoned for commercial development but restricted in development potential by specified factors; give net developable vacant property zoned and suitable for commercial development)
- c. Premium Commercial Property:  
(give the number of sites and aggregate acreage of developable vacant property on parcels of three acres or more zoned for commercial usage)

- d. Commercial Development Adjacent to Town:  
(cite available data regarding extent of and potential for commercial growth in areas adjacent to the town)

4. Land for Residential Development

- a. Gross Vacant Property Zoned for Residential Development:  
(give amount of vacant property in town zoned for each zoning category of residential development)
- b. Net Developable Vacant Property Zoned for Residential Development:  
(give amount of vacant property in town zoned for each zoning category of residential activity which is restricted in development potential by specified factors; give net developable vacant property zoned and suitable for development in each residential zoning category)
- c. Residential Development Adjacent to Town:  
(cite available data regarding extent of and potential for residential development in areas adjacent to the town)
- d. Subdivision Lots Platted:  
(give the number of subdivision lots platted in town, APA, and county generally during the current and each of the preceding five calendar years)

B. Fiscal Assets

1. Real Estate and Public Service Corporation Properties

- a. True Values:  
(give current true values in town and county; give 1990 true values for both jurisdictions; compare percent growth in true values for jurisdictions from 1990 to current ~~if true values are not available, give taxable/assessed/fair market~~) values
- b. Tax Rates:  
(give current effective true real property rate for town and county; compare change for the two jurisdictions since 1990; compare current municipal true rate with rates for other municipalities of comparable size; if true rates are not available for town, calculate using affected county's assessment sales ratio)

2. Fiscal Effort

- a. Local-Source Revenue from Principal Sources:  
(calculate for town and county for most recent fiscal year total local-source tax revenue per capita)

3. Fiscal Stress

- a. Bond Rating:  
(give most recent bond ratings for town and county)
- b. General Obligation Indebtedness:  
(list outstanding general obligation indebtedness of town and county; calculate on a per capita basis; compare town's per capita debt to set of comparably sized municipalities)\*

4. Anticipated Revenues from the APA

- a. Local Revenue Receipts:  
(give total of anticipated general fund revenue receipts from the APA following annexation)
- b. Intergovernmental Aid:  
(give total anticipated intergovernmental aid and estimate the additional receipts from other sources which will be received by the town as a result of the annexation)

C. Public Service Liabilities

1. Cost of Facilities and Services to Accommodate Annexation

- a. Capital Costs
  - 1) General Fund Projects:  
(give total cost of general fund capital projects proposed for construction/purchase during the period following annexation for the purpose of serving the APA; indicate the manner by which the various capital costs will be funded)
  - 2) Water and Sewer Fund Projects:  
(give total cost of water and sewer fund capital projects proposed for construction during the period following annexation for the purpose of serving the APA; indicate the manner by which the various capital costs will be funded)
- b. Operational Cost
  - 1) General Fund:  
[give total operational cost for extension of general governmental services to the APA (e.g., education, law enforcement, fire services, recreation, public works, etc.)]
  - 2) Water and Sewer Fund:  
(give increased operational cost for extension of municipal utility services to the APA)

2. Funding of Facilities and Services for APA  
(if the anticipated revenues from the APA are inadequate to support the construction of facilities and extension of services for that area, indicate how the town will cover the deficiency in its general fund and/or water and sewer utility fund)
  3. Impact of Annexation on Enterprise Funds  
[give the impact of the annexation on the town's enterprise funds (e.g., water, sewer, and/or solid waste) from the equalization of utility rates; state all assumptions and indicate where data is projected]
- D. Other Provisions Of Interlocal Agreement
1. Other Provisions:  
[describe other provisions of interlocal agreement (e.g., moratorium on county to city transition, collaboration on planning or provision of public services, revenue sharing, etc.) that can be cited as being in the best interest of the town]

#### IV. INTERESTS OF THE AREA PROPOSED FOR ANNEXATION

##### A. Community Of Interest

##### 1. Town and Area Proposed for Annexation (APA)

###### a. Urban Services:

(describe those urban services provided directly by town to APA; indicate those services provided pursuant to interlocal cooperative agreement; delineate specific areas provided each service; give number of APA/County residents using services/facilities provided by town)

###### b. Employment

###### 1) Employment Centers:

(identify five largest employers in town and county; give number of employees of each)

###### c. Retail Trade:

(describe importance of retail establishments in town to the economy of general area; give location of any major retail trade centers in town)

###### d. Financial Institutions

###### 1) Number

(give number of banks and savings and loan institutions in town)

###### e. Medical Facilities

###### 1) Hospitals

(give number of hospitals or medical clinics in town)

###### 2) Medical Profession:

(give number of doctors, dentists and other medical professionals who maintain offices in town)

###### 3) Pharmacies

(give number of pharmacies or drug stores located in town)

###### f. Other Professional Services:

(give number of attorneys, accountants, architects, psychologists, or other professionals who maintain offices in town)

###### g. Religious Facilities:

(give number of churches or other religious facilities in town which serve general area)

- h. Service and Social Clubs and Organizations:  
(give number of service and/or social clubs and social service organizations in town which draw membership from general area; give examples of various types)
- i. Governmental Services
  - 1) State  
(list those State governmental offices or facilities in town serving general area)
  - 2) Federal:  
(list those federal governmental offices or facilities in town serving general area)
  - 3) Local  
(list those local governmental offices or facilities in the town serving general area)
- j. Development Factors
  - 1) Density:  
(compare population density of town to that of APA)
  - 2) Land Use Patterns:  
(identify land use patterns which extend from within town into APA)
  - 3) Barriers  
(identify any natural or man-made barriers which promote ties between town and APA)
- k. Other Factors
  - 1) Schools:  
(list those county or private schools in town and in APA that serve the general area)
  - 2) Other Institutions or Facilities:  
(identify any other large public or private institutions or facilities in town, such as colleges or military bases, which impact on community of interest)
  - 3) Usage of Municipal Facilities:  
(give number of residents of county or APA who utilize municipal facilities such as recreation centers, etc.)

2. County and Area Proposed for Annexation (APA)
  - a. Urban Services:  
(describe those urban services provided directly by county to APA; indicate those services provided pursuant to interlocal cooperative agreement; delineate specific areas provided each service)
  - b. Retail Trade:  
(give location of any major retail trade centers in county)
  - c. Agricultural Operations:  
(describe relationship between agricultural properties located in outlying portions of county and APA)
3. Area Proposed for Annexation (APA)
  - a. Employment  
(identify five largest employers in APA; give number of employees of each)
  - b. Retail Trade:  
(give location of any major retail trade centers in APA)
  - c. Financial Institutions:  
(give number of banks and savings and loan institutions in APA)
  - d. Medical Facilities
    - 1) Hospitals  
(give the number of hospitals or medical clinics in APA)
    - 2) Medical Profession:  
(give number of doctors, dentists, and other medical professionals who maintain offices in APA)
    - 3) Pharmacies:  
(give number of pharmacies or drug stores located in APA)
  - e. Other Professional Services:  
(give number of attorneys, accountants, architects, psychologists, or other professionals who maintain offices in APA)
  - f. Religious Facilities:  
(give number of churches or other religious facilities in APA)
  - g. Service and Social Clubs and Organizations:  
(give number of service and/or social clubs and social service organizations in APA which draw membership from general area; give examples of various types)

- h. Governmental Services  
(identify those local, State, and federal governmental offices or facilities in APA)
- i. Other Institutions or Facilities:  
(identify any other large public or private institutions or facilities in APA such as colleges or military bases, which impact on community of interest)

B. Need For Urban Services

1. Sewerage

a. Town

1) Treatment Facilities

- a) Description of Facilities:  
(list each treatment facility serving the town; give location, type, and level of treatment of each)
- b) Construction and Past Expansions:  
(give date of construction and major expansion of each facility)
- c) Capacity of Facilities:  
[give State approved capacity of each in million gallons per day (MGD)]
- d) Current Utilization of Facilities:  
(give average daily flow in MGD for most recent calendar year at each facility; calculate current excess capacity of each)
- e) Proposed Expansions or Upgrading:  
(discuss any propose expansion or upgrading of treatment facilities; give proposed improvement schedule and projected cost)
- f) Problems with Treatment Process:  
(identify any problems with treatment plant process at any facility occurring within last five calendar years)

2) Collection System

- a) Size of System:  
(give total miles of municipally-owned collection lines in entire system; give total miles of municipally-owned lines in town, in other jurisdictions, and in APA specifically)

- b) Connections Served:  
(give total number of sewer connections to municipal lines; give total number of such connections within town, in other jurisdictions, and in APA specifically)
- 3) Municipal Population Served:  
(give approximate percentage of town's population connected to central sewage treatment facilities)
- 4) Municipal Areas Not Served:  
[identify areas within town not served by central sewerage service; indicate any areas designated by Department of Health (DOH) as health hazard areas]
- 5) Pump Stations:  
(give number of pump stations serving municipal system)
- 6) Proposed Improvements to Collection System:  
(describe any planned or proposed improvements to collection system; give improvement schedule and projected cost of each)
- 7) Infiltration and Inflow Problems:  
(discuss any infiltration of groundwater and inflow of storm water problems experienced by collection system; discuss actions undertaken or planned to address infiltration and inflow problems, including amount of locality's funds used to correct existing problems in each of the previous five fiscal years)
- 8) Connection Policy:  
(describe town's mandatory connection policy)
- 9) Fees and Charges:  
(list sewer connection fees, availability fees, and service charges for each category of user)
- 10) Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting sewage collection and treatment system of town)
- 11) Municipal Plans to Serve Area Proposed for Annexation:  
(describe town's plans to serve APA; list all projects, their anticipated costs, and implementation schedule)

- b. County (includes Independent Authority)
  - 1) Treatment Facilities
    - a) Description of Facilities:  
(list each treatment facility serving the APA; give location, type, and level of treatment of each)
    - b) Capacity of Facilities:  
(give State approved capacity of each facility serving the APA in MGD)
    - c) Current Utilization of Facilities:  
(give average daily flow in MGD for most recent calendar at each facility; calculate current excess capacity of each)
    - d) Problems with Treatment Process:  
(identify any problem with treatment plant process occurring at any facility within last five calendar years)
  - 2) Collection System
    - a) Size of System:  
(give total miles of county/authority-owned collection lines in each component of the APA)
    - b) Connections to System:  
(give total number of sewer connections to county/authority-owned lines in each component of the APA)
  - 3) Fees and Charges:  
(list connection fees, availability fees, and service charges for each category of user)
- c. Area Proposed for Annexation
  - 1) Public/Private Treatment and Collection Facilities  
(describe any public or private central sewage collection and treatment facilities located in APA or which serve the APA; identify subdivisions and communities served by such systems)
  - 2) Health Hazard Area:  
(identify any portion of APA designated by DOH as health hazard area)

- 3) Septic Tank Suitability:  
(identify any portion of APA where soil conditions or lot sizes restrict the installation, repair, replacement, or expansion of septic tank drainfields)

2. Water

- a. Town

- 1) Water Sources

- a) Raw Water Sources:  
[give name and location of each raw water source utilized; give DOH approved capacity in MGD of each source; give average daily flow in MGD for most recent calendar year at each source]
- b) Potable Water Sources:  
[give name and location of each potable water source (e.g., wells, springs, etc.) utilized; give DOH approved capacity of each in MGD; give average daily flow in MGD for each during most recent calendar year]

- 2) Treatment Facilities

- a) Number and Description:  
(give number and location of each treatment facility utilized; give date of construction and major expansions of each)
- b) Treatment Capacity and Water Flow:  
(give DOH approved capacity in MGD of each treatment facility; give average daily flow in MGD for most recent calendar year experienced at each)
- c) Proposed Expansion or Upgrading of Sources and Treatment Facilities:  
(discuss any proposed expansion or upgrading of raw or potable water sources and/or treatment facilities; give proposed improvement schedule and projected cost)

- 3) Distribution System

- a) Storage Facilities for Potable Water:  
(give location, type, and capacity of each storage facility used for potable water)

- b) Size of System:  
(give total miles of municipally-owned water distribution lines in municipal system; give total miles of municipally-owned water distribution lines within the town, in other jurisdictions, and in APA specifically)
  - c) Connections Served:  
(give total number of connections served by municipal water lines; give total number of connections served within the town, in other jurisdictions, and in APA specifically)
  - d) Proposed Improvements to Distribution System:  
(describe any planned or proposed improvements to the municipal water distribution system; give improvement schedule and projected cost)
  - e) Problems With Distribution System:  
(indicate magnitude and significance of water loss in distribution system; describe problems resulting from low pressure in lines and any fire flow concerns; identify all areas subject to such problems; give location and extent of all water lines in system with diameter of two inches or less)
- 4) Municipal Areas Not Served:  
(identify areas within town not served by central water distribution system)
  - 5) Well Contamination Problems:  
(describe any well contamination problems in town)
  - 6) Connection Policy:  
(describe town's mandatory connection policy)
  - 7) Fees and Charges:  
(list water connection fees, availability fees, and service charges for each category of user)
  - 8) Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting the water system of town)
  - 9) Municipal Plans to Serve APA:  
(describe town's plans to serve APA; list all projects, their anticipated costs, and implementation schedule)

- b. County (includes Independent Authority)
- 1) Water Sources  
(give name and location of each raw or potable water source utilized to serve APA; give DOH approved capacity in MGD of each source; give average daily flow in MGD for most recent calendar year at each source)
  - 2) Treatment Facilities
    - a) Number and Description:  
(give number and location of each treatment facility utilized to serve each component of APA; give date of construction and major expansions of each)
    - b) Treatment Capacity and Water Flow:  
(give DOH approved capacity in MGD of each treatment facility; give average daily flow in MGD for most recent calendar year experienced at each)
  - 3) Distribution System
    - a) Storage Facilities for Potable Water:  
(give location, type, and capacity of each storage facility used for potable water to serve APA)
    - b) Size of System:  
(give total miles of lines in county/authority water distribution system; give total miles of county/authority water distribution lines in each component of APA )
    - c) Connections Served:  
(give total number of connections served by county/authority water lines; give total number of connections to county/authority lines in each component of APA)
  - 4) Areas Not Served in APA with Water Problems:  
(describe any portions of APA not served by central water distribution; identify any communities in such portion of APA with failing wells or contaminated water supply)
  - 5) Fees and Charges:  
(list water connection fees, availability fees, and service charges)

- c. Area Proposed for Annexation
  - 1) Public/Private Treatment and Collection Facilities  
(describe any public or private central sewage collection and treatment facilities located in APA or which serve the APA; identify subdivisions and communities served by such systems)
  - 2) Population Not Served by Central Systems:  
(identify any portion of APA not served by central water systems; estimate percentage of population in APA living in such areas)
  - 3) Problems in Central Systems Serving APA:  
(describe any low pressure or fire flow problems in the various systems serving APA; identify areas with such problems; give location and extent of all water lines in systems serving the APA with diameter of two inches or less)
  - 4) Well Contamination Problems:  
(identify any well contamination problems in APA)
- 3. Solid Waste
  - a. Town
    - 1) Municipal Collection System
      - a) Description of System:  
(describe frequency and nature of municipal collection service for residential, commercial, and industrial properties; describe any special solid waste collection services offered by locality, e.g., leaf collections, large item pick-up, bulk-container collections)
      - b) Funding of Municipal Service:  
[identify source of funding for municipal service (i.e., user charges or general fund revenue); if user charges subsidize service, give annual magnitude of subsidy]
    - 2) Private Collection Systems
      - a) Description of Systems:  
(give number of private collection firms engaged in solid waste collection in town)

- b) Service Areas, Collection Schedules, and Fee Structure:  
[delineate the service areas assigned to the private collection firms, their collection schedules, number of customers (if residential service is provided) and their fee structure]
  - 3) Municipal Refuse Disposal:  
[give location of all Department of Health (DOH)-approved disposal sites/landfills utilized by town or its residents; give remaining life-span of each]
  - 4) Proposed Expansion of Disposal Sites or Services:  
(discuss any proposed expansion of disposal site or services; give proposed improvement schedule and projected cost)
  - 5) Interlocal Agreements:  
(describe nature and significance of each interlocal agreement affecting the solid waste collection or disposal services of town)
  - 6) Municipal Plans to Serve APA:  
(describe town's plans to serve areas annexed; cite number of proposed new employees; indicate equipment to be acquired, and funds to be expended for extension of service)
- b. Area Proposed for Annexation
- 1) Collection Service in APA
    - a) Entities Serving APA:  
[list all public and private entities serving APA; describe areas served by each; describe frequency, nature of service, and charges imposed by each entity; cite all special services (e.g., leaf collections, large item pick-ups) and any additional charges for such]
  - 2) Bulk Containers:  
(give number and location of all publicly-funded bulk containers in or within five road-miles of APA)
  - 3) Disposal Sites:  
(give location of all DOH-approved disposal sites in or readily accessible to residents of APA)

#### 4. Planning, Zoning, and Subdivision Regulation

##### a. Town

##### 1) Planning

- a) Planning Commission:  
(give date of establishment of planning commission)
- b) Comprehensive Plan:  
(give date of adoption of comprehensive plan; give date of last formal review of comprehensive plan by planning commission since adoption, as required by Section 15.2-2230, Code of Virginia)
- c) Subsidiary Planning Instruments:  
(list, describe, and give dates of adoption of all subsidiary planning instruments such as capital improvement plan, official map, thoroughfare plan, parks and recreation plan, etc.)
- d) Planning Staff:  
(give number and type of employees on locality's planning staff)
- e) Evaluation of Planning Instruments and Activities:  
(identify any deficiencies in comprehensive plan, in other planning instruments, or in planning activities; describe strengths of municipal planning instruments and effort)
- f) Participation on Planning District Commission:  
(if town is currently a member of planning district commission, state name of commission and give date town became a member)

##### 2) Zoning

- a) Adoption and Amendment of Ordinance:  
(give date of adoption of zoning ordinance; give date of last major revision of ordinance)
- b) Administration of Ordinance:  
(give number of employees administering municipal zoning ordinance; note if separate from planning staff)
- c) Evaluation of Ordinance:  
[list deficiencies in ordinance (e.g., protection of agricultural operations, sign control, etc.); cite notable attributes]

3) Subdivision Ordinance

- a) Adoption and Amendment of Ordinance:  
(give date of adoption of subdivision ordinance; give date of last major revision of ordinance)
- b) Breadth of Coverage:  
(list types of subdivisions exempted from ordinance)
- c) Curbs, Gutters, Sidewalks, and Stormdrains:  
(cite provisions in subdivision ordinance related to curbs, gutters, sidewalks, and stormdrains)
- d) Private Streets:  
(cite provisions in subdivision ordinance related to private roads or streets)
- e) Administration of Ordinance:  
(give number of employees administering municipal ordinance; note if separate from planning staff)
- f) Evaluation of Subdivision Ordinance:  
(list deficiencies in ordinance, e.g., subdivisions exempted from review process; cite notable attributes)

b. County

1) Planning

- a) Planning Commission:  
(give date of establishment of planning commission)
- b) Comprehensive Plan:  
(give date of adoption of comprehensive plan; give date of last formal review of comprehensive plan by planning commission since adoption, as required by Section 15.2-2230, Code of Virginia)
- c) Subsidiary Planning Instruments:  
(list, describe, and give dates of adoption of all subsidiary planning instruments such as capital improvement plan, official map, thoroughfare plan, parks and recreation plan, etc.)
- d) Planning Staff:  
(give number and type of employees on county's planning staff)

- e) Evaluation of Planning Instruments and Activities:  
(identify any deficiencies in comprehensive plan, in other planning instruments, or in planning activities; describe strengths of municipal planning instruments and effort)
- f) Participation on Planning District Commission:  
(if county is currently a member of planning district commission, state name of commission and give date county became a member)

2) Zoning

- a) Adoption and Amendment of Ordinance:  
(give date of adoption of zoning ordinance; give date of last major revision of ordinance)
- b) Administration of Ordinance:  
(give number of employees administering county zoning ordinance; note if separate from planning staff)
- c) Evaluation of Ordinance:  
[list deficiencies in ordinance (e.g., protection of agricultural operations, sign control, etc.); cite notable attributes]

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- d) Private Streets:  
(cite provisions in subdivision ordinance related to private roads or streets)
- e) Administration of Ordinance:  
(give number of employees administering county ordinance; note if separate from planning staff)

- f) Evaluation of Subdivision Ordinance:  
[list deficiencies in ordinance (e.g., subdivisions exempted from review process); cite notable attributes]

5. Crime Prevention and Detection

a. Town

- 1) Law Enforcement Personnel:  
(give total number of full- and part-time sworn personnel serving the municipal law enforcement agency; give structure, e.g., types of positions, of law enforcement agency staff)
- 2) Patrol Services
  - a) Patrol Personnel:  
(give number of sworn officers assigned patrol responsibility; give ratio of patrol officers to population of locality)
  - b) Description of Patrol Structure:  
(describe patrol structure of locality; give shift hours, patrol officer distribution; give ratio of patrol officers per shift to land area of locality)
  - c) Calls for Service:  
(give number of calls for service received from town, and APA for current year; give ratio of patrol officers to calls for service)
  - d) Response Times:  
(give average response times for each category of emergency and non-emergency calls)
- 3) Crime Prevention:  
(give number of full-time and part-time personnel assigned to crime prevention activities; describe notable crime prevention programs of locality)
- 4) Emergency Dispatching Services:  
(describe emergency dispatching services available to law enforcement agency)
- 5) Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting law enforcement services of town)

- 6) Municipal Plans to Serve Area Proposed for Annexation:  
(describe law enforcement services to be provided to the APA subsequent to annexation; indicate the projected cost for the extension of such services)
- b. County
- 1) Law Enforcement Personnel:  
(give total number of full- and part-time sworn personnel serving the county's law enforcement agency; give structure of law enforcement agency staff)
  - 2) Patrol Services
    - a) Patrol Personnel:  
(give number of sworn officers assigned patrol responsibility; give ratio of patrol officers to population of locality)
    - b) Description of Patrol Structure:  
(describe patrol structure of locality; give patrol areas, shift hours, patrol officer distribution; give number of specialists on duty during each shift; give ratio of patrol officers per shift to land area of locality)
    - c) Calls for Service:  
(give number of calls for service received for current year; give ratio of patrol officers to calls for service)
- c. Area Proposed for Annexation
- 1) Patrol Services:  
(describe county's current patrol structure for APA)
  - 2) Calls for Service:  
(give number of calls for service received by county from APA for current year)
  - 3) Criminal Activity:  
(give location of those portions of APA with greater than average criminal activity)
  - 4) Municipal Law Enforcement Services:  
(describe any municipal law enforcement services provided on a regular basis to APA)

6. Fire Prevention and Protection

a. Town

- 1) Fire Suppression  
(describe the fire suppression services available in the town)
- 2) ISO Rating:  
[give date of most recent Insurance Services Office (ISO) of Virginia review; delineate the different ISO fire protection classification areas in the locality]
- 3) Emergency Dispatching Services:  
(describe emergency dispatching services available to fire department)
- 4) Interlocal Agreements:  
(describe nature and significance of each interlocal agreement or contract affecting fire services in locality)
- 5) Funding Sources:  
[if fire department is funded by more than one jurisdiction, give amount of funds (exclusive of intergovernmental aid) or services each participating locality has contributed to the operating and capital expenses of the fire department for the current and previous five fiscal years]
- 6) Municipal Plans to Serve Area Proposed for Annexation:  
(describe town's plans to be extend fire services to areas annexed; list all projects, their anticipated costs, and implementation schedule)

b. Area Proposed for Annexation

- 1) Fire Response:  
(give location of each fire station with first-run response responsibility for APA)
- 2) Funding Sources:  
(for each fire company serving APA, give amount of funds or services the town and/or county has contributed to the operating and capital expenses of the fire department for the current and previous five fiscal years)
- 3) ISO Rating:  
(delineate the different ISO fire protection classification areas in APA)

- 4) Fire Hydrants:  
(give number of fire hydrants connected to water distribution lines in APA; identify ownership of water lines)

7. Public Recreation

a. Town

- 1) Recreational Facilities  
(list each municipally-owned recreation site serving the locality; give location and total acreage of each site; list the recreational facilities and major equipment located at each recreational site)
- 2) Other Recreational Facilities:  
(list and describe other notable public or private recreational sites or facilities in locality)
- 3) Recreation Staff:  
(give number of full-time, part-time, and seasonal employees on town's recreation staff)
- 4) Recreational Programs:  
(generally list the public recreational programs offered by town)
- 5) Fees and Charges:  
(list fees assessed residents and nonresidents for participation in town's recreational programs or for use of its recreational sites or facilities)
- 6) Participation in Recreational Programs:  
(give number of resident and nonresident participants in each program or utilizing town's recreational facilities during previous calendar year)
- 7) Municipal Plans to Serve Area Proposed for Annexation:  
(describe town's plans to serve APA; list all projects, their anticipated costs, and implementation schedule)

b. Area Proposed for Annexation

- 1) Description of Sites:  
(describe all public recreation sites located in or within five road-miles of APA; give location, ownership, and total acreage; list the recreational facilities and major equipment located at each recreational site in or within five road-miles of the APA)

8. Curbs, Gutters, Sidewalks, and Storm Drains

a. Town

- 1) Installation Policy:  
(describe town's policy for the installation of each of the following facilities in new developments; describe policy for handling citizen-requested installation of each of the following facilities; give cost sharing formula for the installation of citizen-requested facilities as follows)
  - a) Curbs and Gutters
  - b) Sidewalks
  - c) Storm Drains
- 2) Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe town's plans to install each of the following facilities in APA; list all projects, their anticipated costs, and implementation schedule)
  - a) Curbs and Gutters
  - b) Sidewalks
  - c) Stormdrains

b. County

- 1) Installation Policy  
(describe county's policy for the installation of each of the following facilities in new developments; describe policy for handling citizen-requested installation of each of the following facilities; give cost sharing formula for the installation of citizen-requested facilities as follows)
  - a) Curbs and Gutters
  - b) Sidewalks
  - c) Storm Drains

c. Area Proposed for Annexation

- 1) Presence of Curbs and Gutters:  
(give location of public streets in APA containing publicly maintained curbs and gutters)

- 2) Presence of Sidewalks:  
(give location of public streets in APA containing publicly maintained sidewalks)
- 3) Drainage Problems:  
(give location of developed areas in APA with existing drainage problems)

9. Street Lighting

a. Town

- 1) Installation/Operation Policy:  
(describe town's policy for the installation/operation of publicly funded street lights in new developments or along new thoroughfares; describe policy for handling citizen-requested installation/operation of street lights)
- 2) Municipal Plans to Serve Area Proposed for Annexation:  
(describe town's proposal to extend street lighting services to the APA; list all projects, their anticipated costs, and implementation schedule)

b. Area Proposed for Annexation

- 1) Number of Street Lights:  
(give number of publicly funded street lights in APA)
- 2) Installation/Operation Policy:  
(describe county policy for the installation/operation of publicly funded street lights in new developments or along new thoroughfares; describe policy for handling citizen-requested installation/operation of street lights)
- 3) Street Lighting Problems:  
(identify locations in APA with distinct need for street lights)

10. Street Maintenance

a. Town

- 1) Total Road Mileage:  
(give total linear miles and/or lane-miles of primary and other public roadway in town)
- 2) State Maintained Roads:  
(give total linear miles and/or lane-miles of primary and other public roadway in town maintained by State or eligible for State maintenance payments)

- 3) Street Maintenance Funding:  
[give total of funds provided by State to town for maintenance of primary and other public roadway (exclusive of snow removal) for past five fiscal years; give total local funds expended by town for maintenance of primary and other public roadway (exclusive of snow removal) for past five fiscal years]
  - 4) Municipal Plans to Serve Area Proposed for Annexation:  
(describe town's street maintenance and improvement plans to serve APA; list all projects, their anticipated costs and implementation schedule)
- b. Area Proposed for Annexation
- 1) Total Road Mileage:  
(give total linear miles and/or lane-miles of primary and secondary roadway in APA)
  - 2) State Maintained Roads:  
(give total linear miles and/or lane-miles of primary or secondary roadway maintained by State or eligible for State maintenance in APA)
  - 3) Private Roads:  
(give total linear miles and/or lane-miles of privately maintained roads in APA)
  - 4) Unpaved Roads  
(give total linear miles and/or lane-miles of unpaved public and unpaved private roads in APA)

## V. BEST INTEREST OF THE COUNTY

- A. Land Area:  
(give geographic size of area proposed for annexation; indicate percentage of county's total land area in APA)
- B. Population  
(give population of APA; indicate percentage of county's total population in APA)
- C. Property Assessables:  
(give total assessed values in each major category of property in APA; indicate percentage of county's total of each category of property in APA)
- D. Local Source Revenue:  
(give total amount of local source revenue from APA for most recent fiscal year; indicate percentage of county's total local source revenue collections during that fiscal year)
- E. Intergovernmental Revenue:  
(give total amount of intergovernmental revenue from State sources derived in APA for most recent fiscal year; indicate percentage of county's total)
- F. Industrial Impact:  
(list those industrial operations in APA employing 50 or more persons)
- G. Retail Trade Impact  
(give location of any major retail trade centers in APA)
- H. Impact on County Facilities (Includes Independent Authority)
  - 1. Water Supply and Distribution
    - a. Water Supply and Treatment Facilities:  
(list each county or authority-owned water supply or treatment facility located in APA)
    - b. Distribution System:  
(give total miles of county/authority-owned water distribution lines in APA; give total number of connections to county/authority-owned water lines in APA; indicate percentage of county's total water lines and connections in APA)
    - c. Storage Facilities:  
(give number and aggregate capacity of county/authority-owned storage facilities in APA)
    - d. Ability to Serve Remaining Portion of County:  
(if the town proposes acquisition of county/authority's water supply and distribution facilities in APA, describe impact of loss of such facilities on ability of county/authority to serve remaining portion of county)

2. Sewage Collection and Treatment

a. Treatment Facilities:

(list each county/authority-owned sewage treatment facility located in APA)

b. Collection System:

(give total miles of county/authority-owned sewage collection lines in APA; give total number of connections to county/authority-owned collections in APA; indicate percentage of county's total collection lines and connections in APA)

c. Ability to Serve Remaining Portion of County:

(if town proposes acquisition of county/authority's sewage collection and treatment facilities in APA, describe impact of loss of such facilities on ability of county/ authority to serve remaining portion of county)

3. Other County Facilities:

[list each county/authority-owned facility (such as libraries, parks, solid waste disposal sites) located in APA; if acquisition of any facility is proposed by the town, describe the impact of the loss of such facilities on county/authority's ability to serve the remaining portion of county; if proposed annexation involves a town, describe impact on such county facilities resulting from any prospective increase in intensity of development in APA due to annexation]

4. Acquisition of County Facilities:

(if town proposes to acquire any county/authority-owned facility in APA, give the cost for such purchase; give methodology how the acquisition cost of county/authority-owned was determined)

I. Other Provisions:

[describe other provisions of the proposed agreement (e.g., moratorium on future annexations or town to city transition, revenue sharing, collaboration on planning or governmental services, etc.) that can be cited as being in the best interest of the affected county]

VII. OTHER FACTORS FOR CONSIDERATION

A. Agricultural Land Preservation

1. Comprehensive Planning:  
(describe provisions in town's comprehensive plan and land use regulations which protect or preserve agricultural lands)
2. Use Value Assessment:  
(give date of adoption of use value assessment by town; give categories of uses subject to use value assessment)
3. Agricultural and Forestal Districts:  
(give date of establishment of agricultural and forestal districts program by town; give number and total acreage of agricultural and forestal districts in town)
4. Area Proposed for Annexation  
(give the acreage of property in APA that qualify for use value assessment; give number and total acreage of agricultural and forestal districts in APA)

B. Housing

1. Housing Authority:  
(give date of establishment of town or county redevelopment and housing authority; describe services provided by redevelopment and housing authority; give number of housing units owned or managed by redevelopment and housing authority; describe other assisted housing programs administered by redevelopment and housing authority)
2. Other Public Housing Efforts:  
(give number of publicly funded but privately administered assisted housing units in town by program type; identify any located in APA)

C. Public Transportation

(describe any non-school public transportation services offered by locality; describe any public transportation services available to residents of APA)

D. Interlocal Cooperation

(give examples of services or programs provided by cooperative agreement between town and county)

**VI. DOCUMENTS**

- A. One copy of the below listed documents are to be provided by the municipality and county:
1. Audit reports for most recent fiscal year available and each of the four preceding fiscal years.
  2. Current adopted budget.
  3. Adopted Comprehensive Plan.
  4. Most recently adopted capital improvements plan.
  5. Current adopted zoning and subdivision ordinances.
  6. Waterworks operating permit from the Virginia Department of Health for the municipal or county/authority water system; include Engineering Description Sheet and any correspondence exchanged with State officials concerning deficiencies in that water system.
  7. The Virginia Pollution Discharge Elimination System permit from the Virginia Department of Environmental Quality for the municipal or county/authority sewerage; include any correspondence exchanged with State officials concerning deficiencies in that sewer system.
  8. Any plans for improvements to either the water or sewer systems (e.g., preliminary engineering report); give the current status of the recommendations contained in any such plans.
  9. Any interlocal agreements which have bearing on the proposed agreement.
  10. Any study which examines the fiscal impact of the proposed agreement.
  11. Any other plans, document, or subsidiary planning instruments which the municipality or county determines to bear upon the proposed agreement.