10-1-1997

Doing An Annexation Study: A How-To Guide

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Doing An Annexation Study

A How-To Guide

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Municipal Technical Advisory Service
A statewide agency of
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Institute for Public Service
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Doing An Annexation Study

A How-To Guide

By Harold Yungmeyer
Former Municipal Management Consultant

April 1992
October 1997 (revised & reprinted)

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The Tennessee Municipal League
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To keep city officials current on annexation studies, this guide updates two earlier MTAS reports. The first one, *Outline for Making an Annexation Study*, was published in 1976, and the second, *How to Make an Annexation Study*, came out in 1984. Although the basic annexation statutes haven’t changed since 1955, there have been some amendments and court decisions that affect how an annexation study is conducted.

In addition to those developments, there is the problem of constant turnover in elected and appointed municipal officials. New officials may be unfamiliar with annexation laws and with the inherent problems in the annexation process.

This publication isn’t a complete guide to all Tennessee’s annexation information. For additional information, two other MTAS publications are recommended: *The Tennessee Annexation Law and Other Changes in Municipal Boundaries* (as amended in 1984) and *Annexation Handbook For Cities and Towns in Tennessee*, which may be of particular interest to city attorneys.

Most likely, every city in the state will sometime consider an annexation. The best way to thoroughly determine if it’s feasible is to conduct an annexation study.

A study is important for two reasons. It will provide information needed to conduct a plan of services, which is required by *Tennessee Code Annotated Section 6-51-102* (b) if a municipality is annexing by ordinance and the additional territory will add more than one-fourth square mile (160 acres) or more than 500 people within any 12-month period. An annexation study will also come in handy if the annexation is challenged in court, since a 1974 amendment put the burden of proving the need for an annexation on the annexing city.

In a 1979 case involving a Johnson City annexation, the court ruled that the plaintiffs could demand a jury trial and that the jury would determine the need for the annexation. If an annexation study had been conducted, a basis would have been laid to justify the annexation.

Obviously, there are studies and then there are studies. In his 1985 publication, Gene Puett, former MTAS attorney, stated:

*Even when not required, it is desirable that some study precede annexation action. The study may be no more than personal visits to a small area on the edge of a city by members of the legislative body, and subsequent consultation among them as to the factors to be considered: costs of extending city services to the area, taxes from the area, need to control development, and so forth. However, if the area is substantial in size or population, a more thoroughgoing study should be undertaken.*

This report is just what city officials need to conduct a more thoroughgoing study of a proposed annexation area.
Who Makes The Study?

The responsibility of conducting the annexation study will be determined by the resources available to the municipality. The planning commission should be involved in the process, although primary responsibility might be assigned to the planning staff or under contract to personnel from the Local Planning Office.

T.C.A. Section 6-51-107 provides that "the governing body of a municipality shall, if its charter so provides, and otherwise may, refer any proposed annexation to the planning agency ... for study of all pertinent matters ..." According to T.C.A. Section 6-51-102(b), a plan of service must be submitted to the planning commission, if there is one, for study. (And what better way to get approval of the planning commission than to have its members involved in the study?)

If there is no planning commission, then the mayor, the governing body and/or administrative staff members must assume responsibility for the study. MTAS consultants are always available for assistance.

Keep The Public Informed

When beginning annexation activities, we should remember the importance of keeping the public informed. The chances of the property owners in the annexed area accepting their inclusion into the city are increased if they understand the reasons for the annexation. In "A Less Painful Union," from Tennessee Town & City, Jackie Kersh, former MTAS municipal information consultant, said: A public information program won't guarantee a successful annexation ... but you're sure to have trouble without one. Before plunging ahead with annexation, consider these ideas from the article:

Is there any easy way to annex? Not very often. Can all those affected be persuaded, by weight of logic, that the action is for their own good? No, never all of them.

But with a carefully planned, long-term program of public information, it is possible to persuade those outside the hard core of opposition that annexation is not all bad. You may even, in some cases, keep that hard core from ever forming.

Note the emphasis on long-term, careful planning. A crash program won't have any marked effect; you would be wasting time better spent in preparing your case for court. But if you're willing to begin early and have patience, you will get favorable results in many instances.

... Discuss with them (citizens in proposed areas) some of the reasons the city is interested in annexing their area:

1. To legally recognize urban growth that already has taken place and to provide open space for future development;
2. To provide planning and a system for orderly future growth, thus preventing substandard fringe area development; and

3. To spread the cost of local government among all those already enjoying many of the benefits of a city, such as a place for employment, shopping facilities, and cultural and recreational opportunities.

Up to now you've been speaking in generalities. If the feasibility report is favorable and you decide to annex, you must change immediately to specifics. What will it cost, in dollars and cents, to be annexed? What will the new resident gain in dollars and cents, and when, by annexation? And what must the city spend to give them service?

Give them the facts on:
- city fire protection. (Will annexation reduce their insurance premiums?)
- city police protection.
- street maintenance, cleaning, and lighting.
- water service. (Will rates be lower if they are residents?)
- a voice in the city government.
- sanitary sewage collection and disposal.
- zoning, subdivision, and building inspection regulations to protect property values and eliminate substandard structures.
- planned recreation programs.

Give them an average total, if you can, of what it's costing them now, per family, to live outside the city and what services they receive for that amount. Then give them a total of what they will pay as residents and the services this would include.

Again, give them specific facts on city taxes. A city, like any other organization, can't provide something for nothing. But ask them to weigh carefully the services they will receive against the taxes they will pay and see if they won't come out on the right end of the deal. Remind them, too, that city taxes are a deductible expense when computing their federal income tax.

Some sample public information materials are included as Appendices K, M, and O of this report.
Starting An Annexation Study

Assuming the public is being informed, the planning commission has been consulted, and any major crises are under control, what’s the next step? Former MTAS engineering and public works consultant A.C. Lock has 25 years experience making annexation studies. He says:

All dwellings, businesses, industries, streams, bridges, culverts, and anything else of significance should be located accurately. These sites can be estimated closely enough with the automobile odometer by reading to the nearest 0.1 mile. It is doubtful that an error of more than 150 feet will be made, and this range is acceptable for this type of survey.

Do not attempt, at this time, to identify the areas for the detailed study. However, some judgment might be required to determine where to stop the survey. It isn’t unusual to drive down the highway for a couple of miles and observe 15 to 20 houses per mile, skip one-half a mile or mile and

start back with a count of 15 to 20 houses per mile. Obviously you can’t study the whole countryside.

The next step is to plot this information on a map, with a scale no larger than 1 inch = 2,000 feet. Maps may be obtained from the city, Corps of Engineers, Tennessee Valley Authority, State Department of Transportation, Tennessee State Planning Office, State Board of Equalization, or the county soil conservation office.

The county assessor’s property maps, showing property parcel numbers and acreage, and individual subdivision lots, with lot numbers and dimensions, are especially useful in an annexation study. They are available at a scale of 1 inch = 400 feet, and 1 inch = 100 feet (for subdivisions and other detailed areas) from your county assessor’s office, or from the State Board of Equalization map division in Nashville.

Identifying Annexation Areas

Now you have some preliminary data on a map. How do you select areas for further study?

Although it would be ideal to annex vacant tracts of land that would develop in accordance with zoning, subdivision, and building regulations and codes, it’s not usually possible. But the city can look for areas which have the potential to become urban.

Commercial growth is one sign of urban development. Population density is another indicator. Two to four families per acre certainly is within the urban density category and would require sanitary sewers and a public water supply. One to two families per acre may be considered suburban density, and would require public water supply and sanitary sewers within five years. Soil conditions will dictate exceptions to such rules of thumb.
Density of less than one family per 10 acres may be considered rural, and providing urban services to such areas would likely be quite costly. But areas with one family per 10 acres to one family per acre are probably in transition from rural to suburban, and may need to be considered for annexation.

MTAS senior management consultant Mike Tallent offers this list as a guide to identifying desirable areas for annexation:

1. areas where municipal utilities exist,
2. areas where utility district services exist,
3. industrial areas,
4. commercial areas,
5. fully developed and occupied subdivisions,
6. high density residential areas,
7. potential industrial areas, and
8. potential commercial areas.

While a favorable financial feasibility study can identify preferred annexations, human, environmental, and health factors may stress the need to annex areas requiring more expenditures than the revenues the areas can generate.

Lock continues with his recommended procedure:

It usually makes the study much simpler if the land under study is divided into several areas, even though they may be contiguous. This separation might be because of existing land use, population density, different watershed, flooding problems, availability of utilities, and other reasons. Sketch these areas on a map, and identify them as Areas A, B, C, or I, II, III, etc.

Some place along the way, a description of the land to be annexed must be written. Don’t order a survey unless it is absolutely necessary to describe the areas by metes and bounds. Simply describe the areas by features that can be seen and that are permanent, such as roads, culverts, streams, etc.

Property lines and fences are better than nothing, but are not as permanent as the features just mentioned.

Always try to extend the annexation 300 to 400 feet beyond the center line of a road. Using the center line of a road as a boundary can cause problems, especially for police when responding to wrecks. If the city side of the right-of-way is used, people living in the city will be taxpayers served by a county-maintained road. If the opposite right-of-way is used, people in the county will be using a city-maintained road without contributing anything to its maintenance.

Remember that the final map must define it enough to meet the requirement in T.C.A. Section 6-51-101 that the public notice of the annexation hearing include a "map which includes a general delineation of the area to be annexed by the use of official road names and or numbers, names of lakes and waterways, or identifiable landmarks as appropriate."
An outline is useful in obtaining and organizing the data for an annexation study. The following outline was developed initially by former MTAS consultant Lewis Gorham. If you’ve divided the study into several areas, you can do a separate outline for each area, or tabulate all on one outline using a separate column for each area. There may be large capital expenditures, such as a load-packing garbage truck or an additional fire station, whose costs can be prorated among the various areas on some equitable basis.

The outline’s first form is called “planning” because it provides general information that is further developed in other portions of the outline (see Appendix A for the 13 sample forms).

Most of the data required for this part of the study are necessary for revenue and expense estimates. The population estimate sometimes can be made best by multiplying the number of dwelling units by the average number of persons per unit, as determined by the latest U.S. Census. When preparing data for streets, list state and federal highways separately from local streets.

Form 2 of the outline is the “revenues” portion. Get assessed values for each study area from the county property assessor’s office. This is basically a time-consuming clerical job. Applying the city tax rate to the assessed value will produce the property tax revenue for each area.

The Tennessee Regulatory Authority (TRA) assesses public utilities, which include all privately owned telephone systems, natural gas systems, water and electric systems, electric cooperatives, and railroad, truck, and bus lines. It may be necessary to contact the TRA for help in calculating public utility taxes in the annexation study areas. Payments in lieu of taxes are usually from a municipally owned electric or gas system or housing authority. The managers of these facilities should be able to help figure up any additional payments.

Sales tax estimates may be obtained by submitting a list of businesses and their state sales tax numbers to the state Department of Revenue. The department won’t provide sales tax figures for individual businesses, but will provide a lump sum total for all businesses on the list.

The local beer tax revenue source applies only if you have beer sales outlets in the annexation areas. The amount of the 17 percent wholesale beer tax which changes from county to city revenue upon annexation can be obtained from either the beer wholesalers or the individual retail outlets.

Permits, fines, and other miscellaneous revenue will have to be your own best estimate, based on present receipts.

State-shared taxes vary each year depending on the economy, the governor’s budget, and legislative action. Most are allocated on a per capita basis. However, the state-shared income tax on earnings from out-of-state stocks and bonds is returned to where it was collected, making it difficult to estimate accurately. A figure based on present revenue from the source is about the best you can do.
A word of caution about the timing of an annexation and the receipt of revenues: The assessment date for property to be placed on the tax rolls is Jan. 1, and no revenue will be received until the fall of the year after the property is on the rolls. State-shared taxes become eligible for distribution to an annexing city June 30, and only after a certification of the annexed population has been submitted to the state. Since 1988, local option taxes are shifted only on June 30.

Forms 3-10 of the study outline are work sheets to get cost estimates for services provided by your municipality. To match current revenues with current expenditures, it's suggested capital outlay costs be amortized over the expected life of the equipment or over the length of a bond issue for a major structure or improvement. This will help get an annual cost (principal and interest divided by number of years).

Each department head should be required to complete expense estimates for providing services in the proposed annexation areas at the same level as in the existing city. Like any budget, the department estimates need to be carefully reviewed and, in some cases, adjusted.

A summary of the revenue and expenses for a typical annexation study is in Appendix B. No distinction is made between the general fund and the state street aid fund in the summary. The revenues and expenditures of both funds are put together. They would be separate in an annual budget document.

The revenue and expense estimate doesn't try to project future revenues or expenditures based on future development. Although this may be a somewhat conservative approach, it would be an easy matter to always come out with a favorable revenue-expense picture by using unrealistic projections of future development.

On the other hand, just because an area may show a deficit at present, future growth may very well turn it into a city asset. An adjoining rundown area with no hope of improvement is a liability to your city. Annexing the area and providing city services often will be in the best interest of the community as a whole.
Forms 11, 12, and 13 of the outline are work sheets for your utilities. These services are separated from the tax-supported services since it’s assumed they will be operated on a self-sustaining basis. Frequently, the cost of extending utilities into an annexed area can’t be justified on the basis of the number of potential customers. However, these newly annexed citizens may expect almost instantaneous utility service. Because of this, the feasibility of a proposed annexation may be determined by the cost and timing of utility extensions alone.

If any of the annexation area is served by a utility district, a rural electric authority, or another city, you may be forced to acquire those portions of the utility systems within the area. If the utility system is inadequate, for example the water distribution system is too small for fire protection purposes, you may be forced to acquire it to serve the area.

In addition, although the city has the right to take over utility services in annexed areas under T.C.A. Section 6-51-111, that right may be limited by federal law. If the utility district has issued FmHA bonds, it can probably successfully resist the takeover. For that reason, attempt to determine before the annexation the city’s prospects for success in that area.

Even if your utility funds have enough retained earnings to cover the costs of utility extensions or buy-outs, you’ll still need cash. If the cash isn’t available, then bond issues or capital outlay notes must be used, along with their accompanying interest costs.
The annexation study is finished or perhaps the city has decided to annex without a formal study. What next?

The Tennessee Annexation Law (T.C.A. Sections 6-51-101 through 6-51-113) provides two basic methods of annexation: annexation by ordinance and annexation by referendum. Look at Appendices B and C for the steps needed for each method.

As mentioned before, annexation by ordinance requires a plan of service if the move will add land totaling more than one-quarter square mile (160 acres) or a population of more than 500 people within any 12-month period. Following final passage of the ordinance, there is a 30-day waiting period during which time any owner of property lying within the annexation territory may challenge the annexation in Chancery Court.

Annexation by referendum doesn’t require a service plan, but does need to be voted on by citizens living in the area proposed for annexation. The municipality also may submit the proposal to a referendum of existing residents of the municipality. In this case, both referendums must pass. Again, there is a 30-day waiting period, but no provision for court challenge. Other appendices contain sample resolutions and ordinances, a work sheet for recording real property assessments, a list of officials to notify after completed annexation, and several sample releases for citizens.

One final word of caution: Don’t forget to follow provisions of the Sunshine Law during the proceedings. An annexation court decision went against a city because the citizens weren’t notified properly in accordance with T.C.A. Sections 8-44-101 through 8-44-108, even though the local newspaper made the mistake. Public notice, not media notice, is what counts under the Sunshine Law.
After The Annexation Becomes Effective

When an annexation becomes effective, city officials should be prepared to begin certain services, such as police and fire protection, codes administration, waste collection, and other activities. Some cities have found it good public relations to make such services visible to newly annexed areas on that first day. For example, a patrol car could drive through the area frequently.

Of course, the plan of service may have predicted delays in getting new equipment, and the extension and/or enlargement of water lines and sewers can take many months to complete. Except in several counties, an annual report is required by T.C.A. Section 6-51-108 (b) to be published in the local newspaper, and a public hearing held on progress made in the preceding year on the extension of services in the service plan (see Appendix M for details).

Another good public relations idea is to send a welcome letter to residents (see Appendix N for an example) giving useful information. The letter can also help give the community confidence in the new city government. Be sure to notify officials and agencies of the completed annexation to ensure receipt of designated revenues (see Appendix P).

The city governing body must give close attention to zoning. There can be a gap in zoning coverage from the effective date of annexation to the time when the city has established zoning in the area. Some cities provide in their zoning ordinances this type of statement: All territory which may hereafter be annexed to the city shall be considered to be in the R-1 Low Density Residential District until otherwise classified.

Other cities include the designation in the annexation ordinance itself: The property herein annexed shall be zoned M-1, General Industrial District.

However, under T.C.A. Section 13-2-208 some pre-existing, non-conforming land uses, may be protected regardless of how the city zones the annexed territory.

Cities should urge their planning commissions to meet before the day of annexation to determine what zoning designation would be appropriate.
Study Area: ________________________________
Function: Planning
Form 1

1. Population estimate:

2. Land area, density per acre:

3. Number of dwelling units — homes, trailers, apartments, etc.:

4. Names and types of businesses, manufacturing plants, beer taverns, etc.:

5. Miles of streets with classification as to type, width, and condition (streets and highways maintained by the Department of Transportation should not be included):

6. What services are now available in the area, who provides them, and at what cost (not including county taxes)?

7. Do planning, zoning, codes, and subdivision regulations exist and are they enforced?

8. Is any part of the area in a designated flood plain?

9. Comment on the overall impact of annexation on the growth and development of the city:
## Appendix A

**Study Area:**

**Function:** Revenues

**Form 2**

### Assessed Valuations

- Residential and farm properties
- Commercial and industrial properties
- Public utilities

### Revenue Estimates (Examples)

- Property taxes
  - Real and personal
  - Public utility taxes
  - Payments in lieu of taxes

- Other local taxes
  - Local option sales tax
  - Business tax
  - 17 percent wholesale beer tax

- State-shared taxes
  - Sales ($__/capita)
  - Gasoline and motor fuel ($__/capita)
  - Special tax on petroleum products ($__/capita)
  - Beer ($__/capita)
  - TVA in lieu ($__/capita)
  - Income

- State Street Aid

- Permits, fines, etc.

- Refuse collection fees

### Total Revenue

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Doing An Annexation Study: A How-To Guide
Appendix A

Study Area: ________________________________
Function: General Government
Form 3

(Include all expenses not considered elsewhere — administrative, finance, code enforcement, planning, legal, etc.)

1. Additional personnel cost, including fringe benefits

2. Office expenses

3. Transportation

4. Insurance

5. Contractual services (include Local Planning Office)

6. Capital outlay — additional space, equipment
   (amortize to obtain annual cost)

Total General Government

Comment on the overall impact of annexation on city general government:
Appendix A

Study Area: ____________________________
Function: Police Protection
Form 4

1. Additional personnel needed, by rank

2. Total additional personnel cost, including fringe benefits $ __________

3. Additional cars and equipment
   (amortize to obtain annual cost) $ __________

4. Increased operating expenses
   (supplies, gas, repairs, etc.) $ __________

5. Other miscellaneous expenses $ __________

Total Annual Expense $ __________

Comment on the overall impact of annexation on the police operation:

In calculating annexation costs, estimate total needs to provide police protection to all the annexation study areas, and then prorate this cost to each area.
Appendix A

Study Area: ________________________________________________________________
Function: Fire Protection
Form 5

1. Additional personnel needed, by rank

2. Total additional personnel cost, including fringe benefits

3. Additional engines and equipment
   (amortize to obtain annual cost)

4. Increased operating expenses
   (supplies, gas, repairs, etc.)

5. Hydrant rental (______hydrants at $_______per year)

6. Fire station (amortize to obtain annual cost)

7. Cost of maintaining and operating station

8. Other miscellaneous expenses

Total Annual Expense

$__________________________

Comment on the overall impact of annexation on the fire operation:

In calculating annexation costs, you may wish to estimate total needs to provide fire protection to all the annexation study areas and prorate this cost to each area.
Appendix A

Study Area:__________________________________________________________
Function: Public Works
Form 6

Refuse Collection

1. Additional personnel needed

2. Total additional personnel cost, including fringe benefits

3. Additional trucks (amortize to obtain annual cost)

4. Increased operating expenses (supplies, gas, repairs, etc.)

5. Additional landfill cost

Total Annual Expense

To get a total expense, you can estimate in terms of a unit cost per pickup.
### Appendix A

**Study Area:**

**Function: Public Works**

**Form 7**

**Street Maintenance**

1. Additional personnel needed

2. Total additional personnel cost, including fringe benefits

3. Additional trucks and other equipment needed
   (amortize to obtain annual cost)

4. Annual cost per mile of maintaining various types of streets and roads in the area times number of miles of each type for total cost
   (include all applicable programs — patching, sweeping, snow removal, etc.)

5. Cost of street paving or resurfacing where total cost is borne by city
   (amortize to obtain annual cost)

6. Annual cost of city’s portion of street paving projects (where special assessments are used)

7. What special street problems exist in the area? Narrow or antiquated bridges, especially steep grades, wash-outs from surface drainage, railroad grade crossings? Amortize costs of corrective action.

### Total Annual Expense

$
Appendix A

Study Area: 
Function: Public Works
Form 8

Street Lights

1. Number and cost of street lights $ 
2. Total annual street lighting cost $ 

Traffic Signs and Signals, Street Name Signs, Etc.

1. Operating and maintenance cost $ 
2. Capital outlay (amortize to obtain annual cost) $ 

Total Annual Expense $ 

Comment on the overall impact of annexation on the public works operation with the exception of water and sewer:
Appendix A

Study Area: 

Function: Parks, Recreation, and Cemeteries

Form 9

1. Annual cost of providing recreation program in each area (deduct from this cost any revenue from fees to obtain net cost to city) $____________________

2. Number of acres of public parks that would be acquired through annexation ____________________________

3. Number of acres of public cemeteries that would become a responsibility of the city to maintain, upon annexation ____________________________

Comment on the overall impact of annexation on the recreation program:
Appendix A

Study Area: ____________________________________________
Function: Education
Form 10

Estimate the additional cost to the city to provide education in city school systems for pupils in each study area on an annual basis (indicate local city contribution only).

$________________________

Comment on the overall impact of annexation on the city school system:
Appendix A

Study Area: 
Function: Utilities
Form 11

Water and Sewer Service

The city may want to hire a consulting engineer to determine the cost of providing utility services to the areas of study, the effect on the present utility plan, the adequacy of the service of the utility districts in the utility area, etc. In any event, these questions should be considered:

1. Number of water consumers now served by the city in the area. Estimate revenue loss, if any.

2. Utility district boundaries in the area and the number of their customers:

3. Do the utility districts serving the area have any outstanding FmHA bonds? (It may not be possible to take over utility services under Tennessee Code Annotated Section 6-5-111 if a district has such bonds outstanding.)

4. Is there an adequate water supply for extension to the area?

5. Would many of the existing water lines have to be replaced with larger lines for fire hydrants? Can you give a rough estimate of the cost of water line extension and replacement? Financing method?

6. Estimate (with fire chief) the number and cost of fire hydrants to be installed in the area.

7. Are the soil characteristics generally suited for individual sewage disposal?

8. What are the present sanitation problems in the annexation area? Special industrial wastes?

9. Is there a need for a public sewerage system? If so, within what period of time? Immediate? 5-10 years? 10-15 years?

10. Can the sewage treatment plant absorb the load that would be added by extending sewers into these areas?
11. If possible, outline a feasible plan for extending sanitary sewer service to the area in the time frame indicated. Include a rough estimate of the cost and method of financing (existing rate structure, grants, tap fee, special sewer construction, service charge, or special assessment).
Appendix A

Study Area: ________________________________
Function: Utilities
Form 12

Natural Gas Service

1. Can the city’s natural gas system afford to extend gas mains into the annexation area to serve new customers without rate increases?

2. Are any of the people in the annexed area served gas by a utility district?

3. Does the utility district have any outstanding FmHA bonds? (It may not be possible to take over gas services under Tennessee Code Annotated Section 6-5-111 if the district has such bonds outstanding.)
Appendix A

Study Area: _____________________________________________________________

Function: Utilities

Form 13

Electric Service

1. Is any part of the annexation area served by an electric membership corporation?

2. What would be the total cost of acquiring the lines and other facilities in the annexation area?


4. Would such acquisition require an electric rate increase for city customers?
Appendix B

Typical Summary of Revenues and Expenditures
(for an annexation area with a population of 500)

Revenues:

Property tax ($3 per $100 of assessed value)  $65,700
Payments in lieu of taxes  3,300
Local option sales tax  1,500
Business tax  200
State-shared taxes*
Sales ($39.99 per capita)  19,950
  Beer (46 cents per capita)  230
  TVA gross receipts ($5.45 per capita)  2,725
  Income tax  100
  Special tax on petroleum ($2.60 per capita)  1,300
  Gasoline and motor fuel ($25.33 per capita)  12,665
Refuse charges  7,500
Miscellaneous revenue  200

Total Revenue  $115,370

Expenses:

General government  $ 500
Police protection  35,000
Fire protection  12,000
Refuse collection  15,000
Street maintenance  30,000
Street lights  5,000
Traffic signs and signals  1,000
Recreation  500

Total Expenses  $ 99,000

*These per capita figures are estimated each year by MTAS after the state budget passes.
Appendix C

Suggested Schedule for Annexation by Ordinance
(References are sections of Tennessee Code Annotated)

<table>
<thead>
<tr>
<th>Enter Suggested or Required Dates</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obtain appropriate property and topographic maps.</td>
<td></td>
</tr>
<tr>
<td>Tour annexation areas. Determine boundaries of annexation areas. Develop map of areas.</td>
<td></td>
</tr>
<tr>
<td>Draft a plan of service if required. (For sample, see Appendix F.)</td>
<td></td>
</tr>
<tr>
<td>Estimate costs of serving annexation areas.</td>
<td></td>
</tr>
<tr>
<td>Estimate revenues to be derived from annexation areas.</td>
<td></td>
</tr>
<tr>
<td>Prepare annexation report and distribute to city governing body, which reviews report and determines whether to pursue annexation, change proposed boundaries of annexation area, and modify proposed plan of service.</td>
<td></td>
</tr>
<tr>
<td>City governing body refers plan of service to planning commission, and passes resolution authorizing placement of newspaper notice of public hearing on proposed annexation and on plan of service. Notice must state three locations where plan can be examined. T.C.A. Section 6-51-102(b) (See Appendices G and H.)</td>
<td></td>
</tr>
<tr>
<td>Publish newspaper notice of public hearing on annexation and on plan of services. Notice must be published at least seven days prior to the hearing. The notice of the annexation ordinance must include a map of the annexed area that meets the requirements of T.C.A. Sections 6-51-101 and 6-51-102(b) (See Appendix H.)</td>
<td></td>
</tr>
<tr>
<td>Planning commission reports on plan of service in writing to the city governing body (within 90 days of receipt of plan of service, unless governing body by resolution grants a longer time). T.C.A. Section 6-51-102(b)</td>
<td></td>
</tr>
<tr>
<td>a. Public hearing on proposed annexation and plan of services may be held together or separately. T.C.A. Section 6-51-102(b)</td>
<td></td>
</tr>
<tr>
<td>b. Pass resolution adopting plan of service, after making any changes agreed on by the city governing body. (See Appendix F.)</td>
<td></td>
</tr>
<tr>
<td>c. First reading of annexation ordinance. Second and third readings of annexation ordinance depending on charter requirements.</td>
<td></td>
</tr>
</tbody>
</table>
### Appendix C

**Suggested Schedule for Annexation by Ordinance**  
(References are sections of *Tennessee Code Annotated*)

<table>
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<tr>
<th>Enter Suggested or Required Dates</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Start of 30-day appeal period. <em>T.C.A.</em> Section 6-51-102(a)(1)</td>
</tr>
<tr>
<td></td>
<td>Last day of 30-day appeal period. If a quo warranto suit is filed within the 30-day appeal period, then the annexation is suspended and the case is heard according to law. <em>T.C.A.</em> Section 6-51-103</td>
</tr>
<tr>
<td></td>
<td>Take census of annexation area, using city employees, volunteers, or other people, in accordance with regulations of the Tennessee State Planning Office. If time is short, the census could be taken during the 30-day waiting period.</td>
</tr>
<tr>
<td></td>
<td>Local Planning Office officials spot-check the census (at a fee of 10 cents per person in the annexation area) and certify the count to the Tennessee Department of Revenue.</td>
</tr>
<tr>
<td><strong>January 1</strong></td>
<td>Annexed property is placed on the city tax roll on the assessment date (January 1) after the effective date of annexation.</td>
</tr>
<tr>
<td><strong>July 1</strong></td>
<td>Date of recalculation of total Tennessee municipal population for purposes of allocating tax revenues that are shared on a per capita basis.</td>
</tr>
<tr>
<td></td>
<td>Notify the necessary officials and agencies of completed annexation to ensure receipt of designated revenues. (See Appendix P.)</td>
</tr>
</tbody>
</table>
### Appendix D

**Suggested Schedule for Annexation by Referendum**
(References are sections of *Tennessee Code Annotated*)

<table>
<thead>
<tr>
<th>Enter Suggested or Required Dates</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Obtain appropriate property and topographic maps.</td>
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<tr>
<td></td>
<td>Tour annexation areas. Determine boundaries of annexation areas. Develop map of areas.</td>
</tr>
<tr>
<td></td>
<td>Estimate costs of serving annexation areas.</td>
</tr>
<tr>
<td></td>
<td>Estimate revenues to be derived from annexation areas.</td>
</tr>
<tr>
<td></td>
<td>Prepare annexation report and distribute to city governing body, which reviews report and determines whether to pursue annexation, and whether to change proposed boundaries of annexation areas.</td>
</tr>
<tr>
<td></td>
<td>City governing body, when petitioned by interested people or on its own initiative, passes resolution calling for an annexation referendum and describing the territory. Copies of the resolution shall be posted in at least three public places in the proposed annexation territory, and in a like number of public places in the present city. At or about the same time, a newspaper notice should be published. A map of the area to be annexed that meets the requirements of <em>T.C.A.</em> Section 6-51-101 must be included in the notices. <strong>No plan of services is required.</strong> <em>T.C.A.</em> Section 6-51-104 (See Appendix J.)</td>
</tr>
<tr>
<td></td>
<td>a. Within 30-60 days of last publication, County Election Commission holds election on the question for qualified voters residing in annexation area. A majority vote carries. <em>T.C.A.</em> Section 6-51-105</td>
</tr>
<tr>
<td></td>
<td>b. Within 30-60 days of last publication, County Election Commission holds election on the question for qualified voters residing in annexation area, and (at the city’s request) also holds election on the question for those residing inside city. A majority vote of each group is required to carry. <em>T.C.A.</em> Section 6-51-105</td>
</tr>
<tr>
<td></td>
<td>After a 30-day waiting period, annexation is final. <em>T.C.A.</em> Section 6-51-105</td>
</tr>
<tr>
<td></td>
<td>Take census of annexation area, using city employees, volunteers, or other people in accordance with regulations of the Tennessee State Planning Office (TSPO). If time is short, the census could be taken during the 30-day waiting period.</td>
</tr>
</tbody>
</table>
## Appendix D

**Suggested Schedule for Annexation by Referendum**  
(References are sections of *Tennessee Code Annotated*)

<table>
<thead>
<tr>
<th>Enter Suggested or Required Dates</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 1</td>
<td>TSPO officials spot-check the census (at a fee of 10 cents per person in the annexation area) and certify the count to the Tennessee Department of Revenue.</td>
</tr>
<tr>
<td>July 1</td>
<td>Annexed property is placed on the city tax roll on the first assessment date (January 1) after the effective date of annexation. Date of recalculation of total Tennessee municipal population for purposes of allocating tax revenues that are shared on a per capita basis. Notify the necessary officials and agencies of completed annexation to ensure receipt of designated revenues. (See Appendix P.)</td>
</tr>
</tbody>
</table>
Appendix E

Work Sheet for Real Property Assessments

Annexation Study Area: ________________ City of ___________________ (___________ County)

Year of Assessment: 19____  Page_______

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Map Number</td>
<td>Tax Parcel Number</td>
<td>Owner</td>
<td>Assessed Value of Parcel and Structures</td>
<td>Number of acres inside annex area</td>
<td>Property class (R, F, C, I) (check if structure)</td>
<td></td>
</tr>
<tr>
<td>If total parcel is inside annex area</td>
<td>If parcel is split, estimate value inside annex area</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes on Use of This Form

Cols. 1 & 2: Map and parcel numbers refer to Tennessee State Board of Equalization property maps, available from the State Board of Equalization or from the county assessor.

Col. 3: List owner as shown in county assessor’s records.

Col. 4: If the total parcel is inside the annexation area, insert the assessed value of the land and structures.

Col. 5: If the parcel is split by the city’s boundary line and/or the annexation boundary line, insert only the value of land and structures within the annexation area. In estimating this partial value, consider the location of residences and other structures and whether some of the property abuts public roads.

Col. 6: Inserting the number of acres inside the annexation area (which will have to be estimated in the case of split parcels) will enable you to reach a total acreage for the area.

Col. 7: Identify by letter whether property classification is residential, farm, commercial, or industrial. Check (x) if a structure is in parcel. This information will aid in counting number of residences, thus estimating population for computing amounts of state-shared taxes. If a “commercial” structure, indicate in Col. 3 or Col. 7 the type of business conducted there. This will give a clue to certain potential tax revenues, such as 17 percent wholesale beer tax, local option sales tax, business tax, etc.
Appendix F

Sample Plan of Service for Annexed Area

A RESOLUTION ADOPTING A PLAN OF SERVICE FOR THE ANNEXATION OF (general description of area) BY THE CITY (TOWN) OF _____________, TENNESSEE.

WHEREAS, Tennessee Code Annotated Section 6-51-102 as amended requires that a plan of service be adopted by the governing body of a city prior to passage of an annexation ordinance if any territory or territories totaling more than one-fourth square miles (160 acres) or having a population of more than 500 persons may be annexed within any 12-month period; and

WHEREAS, the City (Town) of _____________ contemplates exceeding one (or both) of these minimum conditions by the proposed annexation of an area described as follows:

NOW, THEREFORE, BE IT RESOLVED BY THE (designation of governing body) OF THE CITY (TOWN) OF _____________, TENNESSEE:

Section 1. Pursuant to the provisions of T.C.A. Section 6-51-102, there is hereby adopted, for the area bounded as described above, the following plan of service:

A. Police

1. Patrolling, radio responses to calls, and other routine police services, using present personnel and equipment, will be provided on the effective date of annexation.

2. Within approximately _____ months, _____ additional police personnel and _____ patrol car(s) will be added to continue the present level of police services throughout the city, including the newly annexed area.

3. Traffic signals, traffic signs, street markings, and other traffic control devices will be installed as the need is established by appropriate study and traffic standards.

B. Fire

1. Fire protection by the present personnel and the equipment of the firefighting force, within the limitations of available water and distances from fire stations, will be provided on the effective date of annexation.

2. Within approximately _____ months, _____ fire engines (and auxiliary equipment) and _____ personnel will be added to the firefighting force to maintain present standards in the expanded city.

3. Within approximately _____ months (years), _____ additional fire station(s) will be constructed to serve the annexed area.

C. Water

1. Water for domestic, commercial, and industrial use will be provided at city rates, from existing city lines, on the effective date of annexation, and thereafter from new lines in accordance with the current policies of the city.
Appendix F

Sample Plan of Service for Annexed Area

2. Water for fire protection will be available within approximately _____ months (years), the time estimated to be required to install adequate water lines and fire hydrants in the annexed area.

3. In those parts of the annexed area presently served by utility district(s), the above time periods will begin with acquisition by the city of such district(s) or parts thereof, which may be delayed by negotiations and/or litigation.

D. Sanitary Sewers

1. The necessary intercepting and trunk sewers to serve the substantially developed annex area(s) should be completed within approximately _____ years.

2. Construction of collection sewers in the substantially developed annex area(s) should be completed within approximately _____ years. Residences and commercial and industrial properties will then be connected to those sewers in accordance with current policies of the city.

E. Refuse Collection

The same regular refuse collection service now provided within the city will be extended to the annex area (within one week after the effective date of annexation). This will take place as soon as additional personnel and equipment can be obtained, estimated to require about _____ months.

F. Streets

1. Emergency maintenance of streets (repair of hazardous chuck holes, measures necessary for traffic flow, etc.) will begin on the effective date of annexation.

2. Routine maintenance, on the same basis as in the present city, will begin in the annexed area when funds from the state gasoline tax based on the annexed population are received (usually July 1, following the effective date of annexation).

3. Reconstruction and resurfacing of streets, installation of storm drainage facilities, construction of curbs and gutters, and other such major improvements will be accomplished under current policies of the city.

4. Cleaning of streets having curbs and gutters will begin within _____ week(s) after the effective date of annexation on the same basis as the cleaning of streets within the present city.

G. Schools

County schools in the annexed area will become a part of the city school system as soon as necessary negotiations and arrangements with the county can be completed. Usually, this change will take place at the beginning of the school year following the effective date of annexation. Thereafter, the curriculum will be offered in the annexed areas as in other schools of the city system.
Appendix F

Sample Plan of Service for Annexed Area

H. Inspection Services

Any inspection services now provided by the city (building, electrical, plumbing, gas, housing, weights and measures, sanitation, etc.) will begin in the annexed area on the effective date of annexation.

I. Planning and Zoning

The planning and zoning jurisdiction of the city will extend to the annexed area on the effective date of annexation. City planning will thereafter encompass the annexed area. (Some study will be required before specific zoning can be adopted, which should be completed within approximately ______ months after the effective date of annexation.) The property herein annexed shall be zoned ____________ District.

J. Street Lighting

Street lights will be installed in substantially developed commercial and residential areas within approximately _____ months after the effective date of annexation, under the standards currently prevailing in the existing city.

K. Recreation

Residents of the annexed area may use all existing recreational facilities, parks, etc., on the effective date of annexation. The same standards and policies now used in the present city will be followed in expanding the recreational program and facilities in the enlarged city. Approximately _____ acres of land as parks, playgrounds, etc., will be developed within the annexed area.

L. Miscellaneous

1. Where they’re needed, street name signs will be installed within approximately _____ months after the effective date of annexation.

2. (Any other service not classified under foregoing headings.)

Section 2. This resolution shall be effective from and after its adoption.
Appendix G

Sample Resolution for a Public Hearing on Plan of Service

A RESOLUTION CALLING A PUBLIC HEARING ON THE PLAN OF SERVICE FOR PROPOSED ANNEXATION.

WHEREAS, a plan of service for the proposed annexation has been prepared and has been referred to the planning commission for review; and,

WHEREAS, three copies of said plan of service are available for public inspection during regular business hours in the office of the city recorder (or another official), at __________, and at__________;

NOW, THEREFORE, be it resolved by the (designation of governing body) of the City (Town) of__________, Tennessee:

That the city recorder (or other official) be hereby required to have published in the (name of newspaper) of general circulation in the (city or town) on the _____ day of__________, 19___, a notice that a public hearing before this body will be held on the (at least seven days after publication of notice) ___ day of__________, 19___, at (time and place)____________________, to consider the plan of service for the following described area proposed for annexation:

Embracing that certain part of civil district(s) no(s). ______ of ____ County, Tennessee, and more fully described, to-wit:

(NOTE: Use the same description of the area as contained in the plan of service.)
Sample Resolution for a Public Hearing on Proposed Annexation

A RESOLUTION CALLING A PUBLIC HEARING TO DETERMINE WHETHER CERTAIN TERRITORY SHOULD BE ANNEXED TO THE CITY (TOWN) OF ________________, TENNESSEE.

WHEREAS, it appears that the prosperity of this city (town) and of the territory herein described may be materially retarded and the safety and welfare of the inhabitants and property thereof endangered if such territory is not annexed; and,

WHEREAS, the annexation of such territory may be deemed necessary for the welfare of the residents and property owners of the said affected territory and this city (town) as a whole; and,

WHEREAS, the annexation of such territory appears to be for the overall well-being of the communities involved;

NOW, THEREFORE, be it resolved by the (designation of governing body) of the City (Town) of ________________, Tennessee:

That the city recorder (or other official) be hereby required to have published in the (name of newspaper) of general circulation in the (city or town) on the ______ day of ____________, 19____, a notice that a public hearing before this body will be held on the (at least seven days after publication of notice) ______ day of ____________, 19____, at (time and place) ______________, to determine whether the following described territory adjoining the present corporation boundaries should be annexed:

Embracing that certain part of civil district(s) no(s). ______ of ____________County, Tennessee, and more fully described, to wit:

(NOTE: Use the same description of the area as in plan of services. In addition, include a map of the territory to be annexed that meets the requirements of T.C.A. Section 6-51-101.)
Appendix I

Sample Notice of Public Hearing

A public hearing on a proposed annexation, and on a plan of service therefore, of (general description of area) by the City (Town) of ___________, Tennessee, will be held in the__________City Hall at ______ p.m. on ________, _________, 19____.

Copies of the plan of service will be available for public inspection during business hours in the office of the city recorder at ____________, and at ________________.

The annexation area embraces that certain part of civil district(s) no(s). _______ of ____________County, Tennessee, and is more fully described and reflected on the attached map:

(Insert here the boundary description and include a map of the territory to be annexed that meets the requirements of T.C.A. Section 6-51-101.)

Signed ____________________________
Mayor

Attest ____________________________
City Recorder

NOTE: As this notice provides, the hearings on the proposed annexation and on the plan of services may be held at the same time.
Appendix J

Sample Resolution Calling for Annexation Referendum

A RESOLUTION CALLING FOR A REFERENDUM OF ANNEXATION OF CERTAIN TERRITORY TO THE CITY (TOWN) OF ____________, TENNESSEE.

Be it resolved by the (designation of governing body) of the City (Town) of ____________, Tennessee:

Section 1. As provided in Tennessee Code Annotated Sections 6-51-104 and 6-51-105, it is proposed to annex the following described territory adjoining the present corporate boundaries:

Embracing that certain part of civil district(s) no(s). ________ of ____________ County, Tennessee, and more fully described, and reflected on the attached map, to wit:

Section 2. The city recorder (or other official) is hereby directed to have copies of this resolution posted in three public places in this city (town) and in three public places in the above described territory, and to have this resolution published in the (name of newspaper of general circulation in the city of town) on the _____ day of ________, 19__. All copies of this resolution shall be so posted on or before the date of publication in said newspaper. The city recorder (or other official) shall immediately file with this body and with the county election commission a certificate showing the date(s) on which such posting and publication took place.

Section 3. The county election commission of ____________ County is hereby requested to hold an election in said territory proposed for annexation and in this city (town) [add this if the governing body chooses to exercise its option of calling for an election in the city], at least 30 days and not more than 60 days after the foregoing date of newspaper publication.

Attach map of the area that meets the requirement of T.C.A. Section 6-51-101.
Appendix K

Sample Citizens Fact Sheet on Plan of Service

1. **What is a plan of service?**

   It's the city’s formal commitment to residents of newly annexed areas to let them know about what services they’ll receive and when. Adoption of the plan is required by state law. It was prepared by the planning commission in consultation with various city department heads and officials.

2. **What's this hearing all about?**

   To discuss the plan in detail with residents of the area and then for the city council to adopt it by resolution.

3. **What services would new residents receive and when?**

   Let's take them one by one:

   - **Police Protection** - The newly annexed areas will receive all services now available to city residents once the annexation is effective.

   - **Fire Protection** - Same as above, plus the fact there would no longer be any charge. All additional fire hydrants needed would be installed within seven years.

   - **Water and Sewers** - If you're on a city line, your rate would drop to what city residents pay when the annexation becomes effective. New lines would be built on a basis of need, following the city’s established policy.

   - **Garbage and Brush Collection** - Service city residents receive would be extended to the annexed areas within a month after annexation. The slight delay is needed to plan routes.

   - **Streets** - Emergency repairs (traffic hazards) and routine maintenance would begin at once. Reconstruction, resurfacing, and other major improvements would be done as needed, according to city policies.

   - **Schools** - We’re recommending students in annexed areas stay where they are this school year. But there would no longer be tuition charges for those enrolled in city schools. Students could transfer from county to city schools beginning next year.

   - **Inspection Services** - All those the city provides (building, plumbing, electrical, sanitation, etc.) would be available at once.

   - **Planning and Zoning** - Your property would be protected at once. Until a study could be made to learn specific zoning needs (within six months), all property would be classified Residential I.

   - **Street Lighting** - If lights are needed, they would be installed in well-developed areas as quickly as possible, according to regular city policies.
Appendix K

Sample Citizens Fact Sheet on Plan of Service

Recreation - All city facilities and programs would be open to you at once. The standards and policies now in use in the city would apply to expanding activities.

Street Signs - If needed, these would be installed within seven years.

If you have further questions or a specific problem, please contact city hall. We’re all here to help you.
Appendix L

Sample Ordinance to Annex Territory

AN ORDINANCE TO ANNEX CERTAIN TERRITORY AND TO INCORPORATE SAME WITHIN THE CORPORATE BOUNDARIES OF THE CITY (TOWN) OF____________________, TENNESSEE.

WHEREAS, a public hearing before this body was held on the ______ day of __________, 19____, pursuant to a resolution adopted on _____(date)______, and notice thereof published in (name of newspaper) on____ (date) ____; and,

WHEREAS, it now appears the prosperity of this city (town) and of the territory herein described will be materially retarded and the safety and welfare of the inhabitants and property thereof endangered if such territory is not annexed; and,

WHEREAS, the annexation of such territory is deemed necessary for the welfare of the residents and property owners thereof and of the city (town) as a whole; and,

WHEREAS, a plan of service for this area was adopted by resolution of ___(date)____ as required by Tennessee Code Annotated Section 6-51-102 [omit if area and population minimums are not being exceeded];

NOW, THEREFORE, Be it ordained by the (designation of governing body) of the City (Town) of______________, Tennessee:

Section 1. In accordance with T.C.A. Sections 6-51-101 to 6-51-113, there is hereby annexed to the City (Town) of ________________, Tennessee, and incorporated within the corporate boundaries thereof, the following described territory adjoining the present corporate boundaries:

Embracing that certain part of civil district(s) no (s). __________ of ________________ County, Tennessee, and more fully described, and reflected on the attached map which is incorporated by reference as if fully set out here in to wit:

Section 2. This ordinance shall be effective from and after its passage, the public welfare requiring it. (This section should conform to the provisions of the city’s charter governing effective dates of ordinances.)

NOTE: A smaller part of the territory for which public hearings were held may be annexed by this ordinance, but not a greater area.
Appendix M

Sample Citizens Fact Sheet - You and Annexation

There's a big YOU in the proposed annexation by the City of __________. There's a lot in it for you and for the community — now and in the future. We don't promise you'll get more service and convenience for nothing. We DO believe you'll see you're coming out ahead when you look at the facts:

1. What will annexation mean for the city?

   It will mean additional state and county money you already pay out but for which you receive little or nothing in return (about $________ in state sales, gas, and beer taxes and county sales and beer taxes). State funds are returned on a per capita basis.

2. How will YOU benefit from annexation?

   This additional money would allow the city to expand police service and improve street maintenance, repair, and lighting. We also hope to establish fire protection and a sanitary sewerage system. The new services probably would mean lower insurance rates and a healthier living environment.

   Another benefit is the orderly, planned growth that can only take place in a city. This area will grow, whether we want it to or not. Keeping the quality in the community as it grows will depend on careful, long-range planning. It's something we must do together.

3. How much will annexation cost YOU?

   Nothing. ___________ has no city property tax or other special tax you aren't paying already. We don't claim this will always be true in the future, of course, but you'll share in the benefits as well as in any costs.

4. What can YOU expect?

   Tennessee law requires a city to formally adopt a schedule for extending its services to an annexed area. We've done this after a public hearing. Check our plan and you'll know what to expect.

   These are facts we're presenting for your judgment, without any rosy pictures or false promises. These are the reasons your neighbors in the city want you to join them. You'll probably hear some rumors about what annexation involves and how much more it will cost you. Don't believe what you hear until you've checked it out carefully.

Remember: The city needs U and U need the city. Annexation will add an S to your U to make an unbeatable combination: US!

City of ____________________________
Appendix N

Annual Review of Plan of Service

Tennessee Code Annotated Section 6-51-108(b)

(b) Except in counties having a population of not less than 65,000 nor more than 66,000 and counties having a population of 400,000 or more according to the federal census of 1970 or any subsequent federal census and except in counties having a metropolitan form of government, upon the expiration of a year from the date any annexed area for which a plan of service has been adopted becomes a part of the annexing municipality, and annually thereafter until services have been extended according to such plan, there shall be prepared and published in a newspaper of general circulation in the municipality a report of the progress made in the preceding year toward extension of services according to such plan, and any changes proposed therein, and the governing body of the municipality shall publish notice of a public hearing on such progress reports and changes, and hold such hearing thereon.

Any changes in the plan of service shall be incorporated in a resolution approved by the governing body of the municipality. Any owner of property in an annexed area to which such plan and progress report are applicable may file a suit for mandamus to compel the governing body to comply with the requirements of this subsection.
TO: All Residents of the Newly Annexed Areas

WELCOME — officially — into the City of _____________. You’ve been our neighbors, and now it’s good to have you as part of the family. There’s a lot in this new relationship for you and for the city, both in a long-range sense and right away. We’ve never said you’d get added conveniences and services for nothing, but we do believe you’ll find, in most cases, these services will cost you less than you’ve been paying.

This information is to help you fit into your new role as a _____________ resident as quickly as possible:

**Police Protection**
You are now protected by the _____________ Police Department. The number to call is _____________.
We have a permanent force of _____________ full-time officers ready to serve you.

**Fire Protection**
The _____________ Fire Department will respond whenever you need it without charge; just call _____________. We have well-trained firefighters equipped with _____________ pumbers (_____, _____, and ___________ gallons respectively). In addition to their regular duties as firefighters, department members provide other services such as inspections of property for fire hazards. If your commercial or industrial operation has some unusually hazardous areas, please advise the Fire Department at once. We like to look at these things in advance and plan control measures before they’re needed.

**Fire Insurance**
___________ has a class 6 fire insurance rating. Your premium should decrease by approximately 30 to 35 percent now that you’re part of the city.

**Refuse Collection**
Garbage in residential areas is collected twice weekly (presently _______ and ________) at the curb. To prevent costly injuries to workers, city regulations require use of standard garbage containers no larger than 30 gallons (maximum weight 70 pounds); use of oil drums is prohibited. If you experience any delays or have other problems, call _____________. Practically any type of trash will be picked up, at your request, for disposal in the sanitary landfill. Call _____________ for service.

Commercial schedules, containers, and rates are separately established. We’ll be pleased to answer any questions you have.

**Streets**
All streets in the newly annexed areas are now the responsibility of the city. We will do everything possible to provide good maintenance, but if you want to report a particular problem, contact the street superintendent, ____________.
Appendix O

Sample Welcome Letter (City Letterhead)

Water and Sewer Service
Now that you’re part of the city, your water and sewer rates will be 33 percent less than they were before annexation. If you have any questions about service or if an emergency occurs, call the Water Department, ____________.

Property Taxes
The city tax rate is $1.40 per $100 based upon 25 percent of the appraised value. For example, if your property has a $20,000 appraised value, your tax would be $20,000 x 25% X $1.40 divided by 100 = $70. You will not pay any taxes until 19____. Bills will be mailed next October.

Elections
The next city election is in _____________. If you’re registered to vote in the county, you are eligible to vote in the city. If you aren’t registered, do so as soon as possible at ________________________________________________________________________.

City Government
Your local legislature is the ________________ City Council. Meetings are the second Monday of each month at 8 p.m. at the municipal building. Special meetings are announced in the paper. You’re invited to attend.

Let me repeat how pleased we are to have you as a citizen of ____________. We need you and we believe you’ll find that you need us, too. Cities either grow or decline — they never stand still. ________________ is growing how a city should — in an orderly, planned way. With your help it will continue.

If and when you need service or information, you’ll find us listed under “Government” in the phone book. Our departments want to help you any way they can. We’re very happy to have you with us!

Sincerely,

__________________________
(Signature of Mayor)
Appendix P

Officials and Agencies to Notify after Annexation

1. Obtain a listing (names and addresses) of beer wholesalers from the annexed beer retailers, if any. All wholesalers should be mailed an affidavit describing the area annexed and the effective date of annexation. This assures the city of added 17 percent wholesale beer tax revenues, beginning July 1, following the annexation.

2. Send a list of businesses in the annexed area subject to the local option sales tax, and notification of the effective date of the annexation to:

   Director of Taxpayer Services
   Tennessee Department of Revenue
   Andrew Jackson State Office Building
   500 Deaderick Street, Third Floor
   Nashville, TN 37242

   This will facilitate the proper allocation of local option sales tax revenues to the city.

3. Send a certified copy of the annexation ordinance and a map to the Tennessee Department of Transportation:

   Tennessee Department of Transportation
   Cartography Section
   James K. Polk State Office Building
   505 Deaderick Street, Suite 1000
   Nashville, TN 37219

   This will give the Department of Transportation information needed to prepare a new map of the city, or to amend the existing map.

4. Send a certified copy of the annexation ordinance and a map to the county assessor.

   This will help the assessor to count the annexed properties as part of the city in preparation for future city assessment and tax rolls.
Appendix P

Officials and Agencies to Notify after Annexation

5. Mail certification to:

Office of State Assessed Properties
Tennessee Regulatory Authority
460 James Robertson Parkway, Suite 200
Nashville, TN 37243-0505

The Assessment Division should be sent:
• a legal description of areas annexed,
• a map of areas annexed, and
• names of public utilities serving the annexed areas, including mention of any localized property, such as substations.

This certification will assure the city of the added public utility assessments for the annexed areas.

6. Send a certified copy of the annexation ordinance and a map to the county election commission.

This will aid the commission in correcting its voter registration lists.
The University of Tennessee does not discriminate on the basis of race, sex, color, religion, national origin, age, handicap, or veteran status in provision of education opportunities or employment opportunities and benefits.

The University does not discriminate on the basis of sex or handicap in its education programs and activities, pursuant to requirements of Title IX of the Education Amendments of 1972, Public Law 92-318, and Section 504 of the Rehabilitation Act of 1973, Public Law 93-112, and the Americans With Disabilities Act of 1990, Public Law 101-336, respectively. This policy extends to both employment by and admission to the University.

Inquiries concerning Title IX, Section 504, and the Americans With Disabilities Act of 1990 should be directed to Gary W. Baskette, director of business services, 109 Student Services and Administration Building, Knoxville Tennessee 37996-0212, (423) 974-6622. Charges of violation of the above policy should also be directed to Mr. Baskette.

Authorization No. E14-1050-00-006-98