

REQUEST TO ESTABLISH DOCKET
(Please Type)

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02 MAR 18 PM 3:15
COMMISSION
CLERK

Date: 03/18/2002 Docket No. 020247-WU

1. Division Name/Staff Name: ECONOMIC REGULATION/BIGGINS

2. OPR: BIGGINS

3. OCR:

4. Suggested Docket Title: REQUESTING A TARIFF INCREASE FOR THE PORTION OF THE TARIFF THAT APPLIES TO THE CITY OF OCALA IMPACT FEE.

5. Suggested Docket Mailing List (attach separate sheet if necessary)

A. Provide NAMES OR ACRONYMS ONLY if a regulated company.

B. Provide COMPLETE NAME AND ADDRESS for all others. (Match representatives to companies.)

1. Parties and their representatives (if any):

VENTURE ASSOCIATES UTILITIES CORPORATION	
2661 NORTHWEST 60 TH AVENUE	
OCALA, FL 34482	

2. Interested persons and their representatives (if any):

6. Check one:

Documentation is attached.

Documentation will be provided with recommendation.



March 08, 2002

Troy Rendell
Florida Public Service Commission
Division of Commission Clerk and
Administrative Service
2540 Shumard Oak Blvd.
Tallahassee, FL 32399-0850

Re: Venture Associates Utilities Corp - Certificate # WU-512
Tariff increase for City of Ocala Impact Fee

Dear Mr. Rendell:

Venture Associates Utilities is hereby requesting a tariff increase for the portion of our tariff that applies to the City of Ocala Impact Fee.

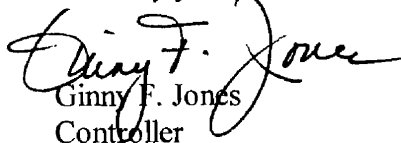
The City of Ocala Impact fee has increased for the period beginning April 2001. Our Tariff allows us to collect the fee of \$600.00 per home, which is not adequate for the current fee schedule charge by the City of Ocala. The new fee schedule is based upon the ERU factor of square footage. Attached please find documentation to confirm this change.

Also affixed is the Fifth Revised Sheet No. 38.0, which cancels the fourth revised tariff sheet number 38.0. There are four copies of all necessary paperwork enclosed for your office.

Please contact me at 352-732-9898 if the enclosed information is lacking in any way.

Thank you for your assistance.

Sincerely yours,


Ginny F. Jones
Controller

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COMMUNICATIONS SECTION
APR 11 2002

02-0028

VENTURE ASSOCIATES UTILITIES CORPORATION

WATER TARIFF

SCHEDULE OF FEES AND CHARGES

<u>Description</u>	<u>Palm Cay</u>	<u>Ocala Palms</u>	<u>Sheet No.</u>
Main Extension Charge			31.0
Residential-per ERC (350 gpd)	\$ 417.00	\$ 715.00	31.0
All Others-per gallon	\$ 1.19	\$ 2.0429	
Off-site Facilities			31.0
Refer to Rule 7.0 & 7.1	Actual Cost	Actual Cost	
Refundable Advances			35.0
Refer to Rule 16.0	Actual Cost	Actual Cost	
Plant Capacity Charge			29.0
Residential-per ERC (350 gpd)	\$ 300.00	N/A	29.0
All Others-per gallon	\$.86	N/A	
Meter Installation Fees			33.0
5/8 X 3/4"	\$ 75.00	\$ 100.00	33.0
1"	\$ 105.00	Actual Cost	33.0
1 1/2"	\$ 155.00	Actual Cost	33.0
2"	Actual Cost	Actual Cost	33.0
Over 2"	Actual Cost	Actual Cost	33.0
Customer connection (Tap-in) Charge			34.0
Refer to Rule 13.0	Actual Cost	Actual Cost	
Plan Review and Inspection Fees			32.0
Refer to Rule 9.0	Actual Cost	Actual Cost	
Inspection Fee			32.0
Refer to Rule 8.1	Actual Cost	Actual Cost	
City of Ocala Impact Fee			36.1
Refer to Rule 19.0			
Residential-per ERU 0-1,499 sq. ft.	N/A	\$ 503.00	
Residential-per ERU 1,500-2,499 sq. ft.	N/A	\$ 629.00	
Residential-per ERU 2,500-3,499 sq. ft.	N/A	\$ 838.00	
Residential-per ERU 3,500 sq. ft.	N/A	\$1,048.00	
All Others-Per Gallon	N/A	N/A	

EFFECTIVE DATE - Billing Period beginning May 17, 2002

TYPE OF FILING - Certificate Amendment

Arthur F. Tait, Jr.
 President & General Manager

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Wastewater. The term "wastewater" is interchangeable with the term "sewage" as defined in this section.

Water impact fee means the portion of the impact fee assigned by the city for the utilization by the user of portions of the city's water system.

Water system means the water system owned, operated and maintained by the city, together with all extensions and expansions thereof and replacements thereto. It shall include the water distribution system, supply wells, treatment plants, storage facilities, pumping stations, elevated tanks and all other related facilities required for the proper operation, maintenance, extension and expansion of the city's water system. (Code 1961, § 21-53; Code 1985, § 24-21; Ord. No. 1810, § 1, 11-19-85; Ord. No. 2756, § 1, 8-19-97; Ord. No. 4050, § 2, 5-8-01)

Cross reference—Definitions generally. § 1-2.

Sec. 70-502. Impact fee imposed.

(a) Findings and background.

- (1) The city council finds and declares as follows:
 - a. The city is committed to providing adequate water and sewer facilities for the residents of the city and surrounding areas served or to be served by the city's water and sewer systems department.
 - b. New development imposes increased and excessive demands upon the water and sewer systems.
 - c. Planning and studies project that new development will continue and will place ever-increasing demands on the city to provide adequate water and sewer.
 - d. To the extent that new development places demands upon the water and sewer systems, those demands should be satisfied by shifting the responsibility for financing the expansion of the systems from the public to the users creating the demands.
 - e. The city council has considered adequate information, including the Wa-

ter and Wastewater Rate Study, prepared by Public Resources Management Group, Inc., and dated April 17, 2001 (the "2001 Rate Study").

- f. The use of impact fees has become an accepted method of paying for public improvements that must be constructed to serve new growth.
 - g. The imposition of impact fees hereunder to finance the extension or expansion of the water and sewer systems is in the interest of the public including the residents of the city and surrounding areas served by the water and sewer department, and does not impose an unfair burden on new development or users.
 - h. The evidence reviewed by city council, including the 2001 Rate Study, demonstrates a reasonable connection between the need for additional facilities for the water and sewer systems and the growth and population generated by new development and users, and a reasonable connection between the contemplated expenditures of impact fees collected and the benefits accruing to such development and users.
- (2) Division 2 of article V of Chapter 70 of the Code of Ordinances of the City of Ocala previously established water and sewer system development charges. Those charges were impact fees but confusion was created by reference to them under a term other than impact fees.
 - (3) Further, the sewer system development charges were imposed throughout the entire area served by the water and sewer department. Based upon the 2001 Rate Study, however, the city council has determined that sewer impact fee zones should be created to more accurately allocate the cost of expanding and extending the sewer system within particular areas that benefit by the expansion and extension.

(4) The city council has determined to amend division 2 of article V of chapter 70 to refer to the charges imposed thereby as impact fees, to divide the area served by the sewer system into sewer impact fee zones and to assess impact fees accordingly, and otherwise to revise the provisions of the Code concerning impact fees.

(b) *Basis for impact fee.*

- (1) There is hereby imposed a impact fee, based on the equitable portion of the cost of financing the extension or expansion of the water and sewer systems, on the equivalent single-family residential unit (ERU) responsible for creating the need for additional financing of the water and sewer systems.
- (2) The sewer impact fee shall vary based upon the location of the property being serviced. For purposes of the impact fee, the potential and existing area to be served by the city has been divided into three sewer impact fee zones ("SIF Zones"). The impact fee for each SIF Zone has been calculated based upon the cost of providing the SIF Zone or expansion of the city's sewer system in that particular zone.

(c) *Adoption of sewer impact fee zones.* The city hereby adopts, for purposes of calculating the impact fees under this section, the City of Ocala Sewer Impact Fee Zone Map dated April 2001, prepared by the city water and sewer department

Copies of the map shall be maintained in the water and sewer department and building and zoning department. References herein to a particular SIF Zone corresponds to the area depicted on the map for such zone.

(d) *Time of payment for existing structures.* For existing structures situated inside the corporate limits of the city, the obligation for payment of the impact fee shall occur at the time the plumbing permit is issued by the building official, except as noted in section 70-506. For existing structures situated outside the corporate limits of the city, the obligation for payment of the impact fee shall occur at the time application for water service or sewer service is made to the city.

(e) *Time of payment for new structures.* For new structures situated inside the corporate limits of the city, the obligation for payment of the impact fee shall occur at the time the building official issues the certificate of occupancy for single-family residences or duplexes; or, for all other structures, the building permit. For new structures situated outside the corporate limits of the city, the obligation for payment of the impact fee shall occur at the time application for electric service or water service or sewer service is made to the city.

(f) *Amount.*

- (1) Impact fee per equivalent residential unit. The impact fee shall be as follows for each equivalent single-family residential unit (ERU):

Equivalent Single-Family Residential Units (ERU)	Water	Sewer		
		SIF Zone 1 (purple)	SIF Zone 2 (blue)	SIF Zone 3 (yellow)
1.0	\$838.00	\$1,740.00	\$2,245.00	\$2,640.00

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- (2) Impact fee per residential uses. The impact fee shall be as follows for the following uses each equivalent single-family residential unit with an ERU based on 2,500—3,499 square feet of living space.

Description	ERU Factor	Water Impact Fee	Sewer Impact Fee		
			SIF Zone 1	SIF Zone 2	SIF Zone 3
Single Family (sq. ft.)					
0—1,499	\$0.60	\$503.00	\$1,044.00	\$1,347.00	\$1,584.00
1,500—2,499	0.75	629.00	1,305.00	1,684.00	1,980.00
2,500—3,499	1.00	838.00	1,740.00	2,245.00	2,640.00
3,500+	1.25	1,048.00	2,175.00	2,806.00	3,300.00
MultiFamily					
Duplex	1.20	1,006.00	2,088.00	2,694.00	3,168.00
Triplex	1.80	1,508.00	3,132.00	4,041.00	4,752.00
Quad	2.40	2,011.00	4,176.00	5,388.00	6,336.00
Apartment, Townhouse or Condominium					
1 BR	0.50	419.00	870.00	1,123.00	1,320.00
2 BR	0.70	587.00	1,218.00	1,572.00	1,848.00
3 BR	0.85	712.00	1,479.00	1,908.00	2,244.00

- (3) Residential and commercial impact fee schedule – Out of city service. Impact fees for all customers located outside the territorial limits of the city shall equal the in-city rates, as calculated pursuant to subsection (e)(2) or (4) of this section, multiplied by 125 percent.

- (4) Calculation for commercial and other connections.

- a. Table 1 of this section provides the basis of calculation for the equivalent single-family residential unit (ERU) and impact fee for any given connection.
- b. The figures shown in table 1 are listed for the sole and express purpose of calculating equivalent single-family residential units and impact fees and shall be used for that purpose regardless of the actual water and sewer requirements of the individual connection.
- c. Regardless of the calculation of the ERU as determined by table 1, in no event shall the ERU for any nonresidential, commercial or industrial customer be less than 1.0 for the water impact fee and 1.0 for the sewer impact fee.
- d. Where ERUs are calculated in table 1 based upon a base number of units (e.g., per 100 seats), and the number of units of the actual building use exceeds the base number of units used in table 1, the ERU shall be calculated by dividing the number of units of the actual building use by the base number of units, and then multiplying that result by the number under the ERU column in table 1. Example: A bar has 2,000 square feet. The ERU's shall be calculated as ((2,000 divided by 525) times one) which equals three and eight-tenths ERU's.

TABLE 1

Building Use	Equivalent Single-Family Residential Units (ERU)
Motel and hotel (per room)	0.5
Church, auditorium, theater (per 100 seats)	1.0
Beauty salon, barbershop (per chair)	0.9

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OCALA CODE

<i>Building Use</i>	<i>Equivalent Single-Family Residential Units (ERU)</i>
Laundromat (per washing machine)	1.1
Office, retail store, warehouse (per 19 fixture units)	1.0
Gas station	1.5
Nursing home (per bed)	0.4
Hospital (per bed)	0.6
School, toilets and kitchen (per 35 students)	1.3
School, toilets, kitchen and gym (per 35 students)	2.0
School, toilets only (per 35 students)	1.0
Restaurant (per seat)	.15
Funeral home	1.5
ACLF (per bedroom)	.55
Bar or lounge (per 525 square feet)	1.0
Irrigation (per 19 sprinkler heads)	1.0
Recreational vehicle park (per rental space)	0.5
¹ Shopping center	Per individual use
² Factory or industry	As determined by city
² Public institutions other than above	As determined by city
² Other uses not described above	As determined by city
³ Related facilities	As determined by city
⁴ Combination accounts	As determined by city
⁵ Groundwater remediation	As determined by city

¹ The impact fee for shopping centers shall be imposed at the time the individual units in the shopping center obtain certificates of occupancy from the building official and shall be based on the building use for the individual unit as listed in table 1. The number of equivalent single-family residential units for the common facilities in shopping centers, including such facilities as public restrooms, drinking fountains and water fountains, and the number of equivalent single-family residential units for the office and warehouse space utilized by or reserved for shopping center staff and management, shall be calculated in the following manner:

$$\text{Total number of fixture units}/19 \times 1.0 = \text{Number of ERUs}$$

² The impact fee for these building uses shall be based on any and all information deemed relevant by the city. The prospective customer will be entitled to submit any plans, specifications or other information to substantiate projections of water consumption or sewage flows, and may be

required by the city to submit such substantiating information. If deemed necessary by the city, the city and the prospective customer shall enter into a written agreement formalizing the various terms and conditions to be complied with by the respective parties thereto. Such terms and conditions may include provisions for the metering and sampling of sewage flows for an appropriate period of time and the monitoring of water consumption. Such metering, sampling and monitoring would be compared with original projections of water and sewer demands and appropriate adjustments made to the impact fee.

² The impact fee for laundromats, restaurants, barbershops, beauty salons and other individual uses listed in table 1 which may be contained in or associated with a motel, hotel, retail store, office, apartment complex, condominium complex, mobile home park or other multifamily development shall be determined by using the ERU established for such individual use by table 1 and shall be in addition to the impact fee determined for the

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motel, hotel, retail store, office, apartment complex, condominium complex, mobile home park or other multifamily development.

⁴ Accounts that contain both residential and commercial facilities served through a common meter or common sewer service may be treated as either residential or nonresidential, whichever method of computation results in the larger impact fee

⁵ When plant capacity permits, as determined by the director of water and sewer or his designee, groundwater from remediation projects, not to exceed five years, may be accepted into the sanitary sewer system. Impact fees for remediation projects will be assessed according to the following method:

The impact fee for temporary projects (referred to in this subsection as "Impact Fee(T)"), will be subject to two reduction factors as follows:

H (hours), i.e., the reduction factor for hours of discharge of project

= 0.50 for discharge exclusively from 11:00 p.m. to 7:00 a.m.

= 0.75 for 24-hour-per-day discharge

= 1.00 for all other discharge conditions

F (time), i.e., the reduction factor for length of project discharge

= (Length of time of project discharge (in years)) divided by 35

Impact Fee(T) = Impact Fee × H (hours) × F (time)

Impact Fee(T) shall not be less than 1 ERU.

The timeframe of the project will be estimated at the time the sewer permit is obtained. If the temporary discharge exceeds the original estimate, subsequent fees will be due and payable on an annual basis.

(Code 1961, § 21-54; Code 1985, § 24-22; Ord. No. 1733, §§ 3, 5, 2-26-85; Ord. No. 1810, § 2, 11-19-85; Ord. No. 2181, § 1, 10-2-90; Ord. No. 2349, § 1, 2-2-93; Ord. No. 2413, §§ 1, 2, 10-19-93; Ord. No. 2756, § 2, 8-19-97; Ord. No. 4000, § 1, 11-13-00; Ord. No. 4050, § 3, 5-8-01)

Sec. 70-503. Sewer impact fee to be related to strength of sewage.

The sewer impact fee as set forth in this division shall be based on the user of the sewer

system generating standard strength wastewater, defined as 300 milligrams per liter of five-day biochemical oxygen demand (BOD₅) and 300 milligrams per liter of total suspended solids (TSS). For those users generating wastewater having strengths exceeding that of standard strength wastewater, the sewer impact fee shall be increased by a factor, the numerator of which is either the estimated average monthly five-day biochemical oxygen demand (BOD₅) or total suspended solids (TSS) in milligrams per liter, whichever is greater, with the denominator being 300 milligrams per liter.

(Code 1961, § 21-55; Code 1985, § 24-23; Ord. No. 1810, § 3, 11-19-85; Ord. No. 4050, § 4, 5-8-01)

Sec. 70-504. Applicability; review.

(a) The impact fee imposed by this division shall be imposed on every new equivalent single-family residential unit for which a building permit was issued by the building official after February 2, 1982, and which is served by the existing sewer and water system or which will be served by any extension of the water or sewer system. The impact fee shall also be imposed on every existing equivalent single-family residential unit for which a plumbing permit was issued after February 2, 1982, and which is served by the existing sewer or water system or which will be served by any extension of the water or sewer system.

(b) The impact fee is comprised of two separate services, i.e., water and sewer, and shall be imposed accordingly. For those building units which utilize only one of these services, the applicable impact fee shall be that established for the service utilized. The applicable impact fee for the other service will become due in accordance with the terms of this division when that service is utilized.

(c) The amount of the impact fee shall be reviewed by the city council in September of every year for the purpose of determining the appropriateness of the amount of the current impact fee. (Code 1961, § 21-56; Code 1985, § 24-24; Ord. No. 4050, § 5, 5-8-01)