

**MINUTES  
PLACIDA AREA STREET & DRAINAGE  
MUNICIPAL SERVICE BENEFIT UNIT (MSBU)**

**ADVISORY BOARD REGULAR MEETING  
WEDNESDAY, APRIL 12, 2023**

**1:30 pm – 3:38 pm**

**Mac V. Horton, West County Annex, Room 120  
6868 San Casa Drive, Englewood, Florida**

**Members Present:** Jim Zwetzig, Chair  
Arthur Hanson, Vice Chair  
Tom Rice  
Thomas Rice  
Bob Howell

**Members Absent:** None

**County Staff:** Kimberly Kelley, Community Liaison  
Robert Fakhri, Transportation Engineer  
Ray Slade, Project Manager  
Jeff Litherland, Project Engineer

**Guests:** Sign-in sheet attached

**Call to Order / Roll Call:**

The meeting was called to order at 1:30 p.m. A roll call was taken, and a quorum was present.

**Agenda / Motion to Approve Changes:**

None

**Traffic Safety- Transportation Engineer:** Mr. Fakhri reviewed the recent data collected on Cape Haze Drive which indicated the average speed was 33 miles per hour (mph) and he recommends double solid yellow lines to be placed in specific areas. He addressed the crosswalk request in the Winward Community and removal of the curbing near the gas station on Placida Road.

**Citizen Input on Agenda Items Only (3 Minute Limit):**

- Charlie Laurie recommended additional signage as the sidewalk is close to the road and noted orange cones are effective.
- Rex Holdback asked what equipment was used to collect speed data.
- Roseann Nikolic pointed out an edge of pavement repair needed near the entrance at Placida Harbor Club.
- David Hunter expressed the community concern of the Australian pines along Gaspar Drive, noting a fire hazard and safety during the recent hurricane; he asked the MSBU to consider expending funds for trees to be removed. He also mentioned their community providing a buffer.
- Dr. Jim Wilson explained the original letter from the law firm requesting the trees to be removed and the legal obligation to remove the Australian pines. He mentioned that county staff and now the Advisory Board have been informed and to help foreseeable hazards, he requested the Advisory Board to recommend expending the funds to remove the trees on Gaspar Drive.
- Jim Pierce explained the need for a sidewalk on Gasparilla Pines Boulevard.

**Approval of Minutes:**

The minutes from February 1, 2023, were unanimously approved as submitted.

**Unfinished Business:**

- a) Bridge Maintenance Plan: Mr. Litherland provided an update on the bridge rehabilitation noting the slopes would need to be replaced, removal of vegetation and no road closure; anticipating the work to begin in June.
- b) Sidewalk Project/Gasparilla Pines: Mr. Slade stated the design is at ninety percent, indicating the sidewalk to be placed on the northside of Gasparilla Pines Boulevard, the increased cost and reviewed cost options of construction. Ms. Kelley provided fiscal scenarios indicating a rate increase would be needed to continue with construction of the sidewalk.
- c) Maintenance of Streets and Drainage: The Advisory Board discussed the Australian pines and invoice; Mr. Howell motioned to move forward with removing the Australian pines with a cost not to exceed \$125,400, there was no second and the motion failed. Mr. Rice indicated a conflict of interest, and he would need to abstain from voting on the Australian pines. Mr. Smith recommended prioritizing projects: paving, bridge, trees and then sidewalks, fulfilling their fiscal responsibility to the MSBU. After continued discussion, Mr. Howell motioned to remove the Australian pines with a cost not to exceed \$120,384, seconded by Mr. Smith and unanimously approved, 4:0.

**New Business:**

- a) Financial Reports: The preliminary fiscal year (FY) 24/25 budget reports and assessment rate scenarios were provided for review. The Advisory Board discussed increasing the assessment rate versus the current economical anguish of increased costs since the pandemic and hurricane events. Mr. Rice motioned to approve the FY24/25 budget, extending the sidewalk construction to possibly FY26 and not in favor of increasing the assessment rate, seconded by Mr. Smith and the motion passed, 4:1.

**Citizen Input on MSBU Items (3 Minute Limit):**

- Jim Pierce conveyed the safety need for the sidewalk as there are many elderly and handicapped residents and recommended other options for construction location.

**Advisory Board Open Discussion:**

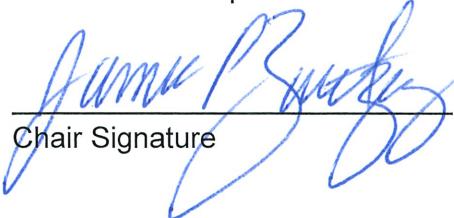
Mr. Rice conveyed he will be relocating to another state, and this would be his last meeting; His expertise, time served, and knowledge was recognized, and his absence will be known.

**Schedule Meetings / Items for Next Agenda:**

Future meetings are scheduled at 1:30 p.m. in the West County Annex conference room as follows:

- Wednesday, August 16, 2023
- Wednesday, November 8, 2023

Submitted by Kimberly Kelley  
Public Works Department

  
Chair Signature

  
Date



**Placida Area Street & Drainage  
Municipal Service Benefit Unit**

Advisory Board Meeting Attendance  
1:30 p.m., Wednesday, April 12, 2023

Location: West County Annex 6868 San Casa Drive, Englewood, Florida

**INFORMATION SUPPLIED ON THIS FORM  
BECOMES PUBLIC RECORD**

NAME (please print)	Email Address	Phone Number
Kimberly Kelley	<a href="mailto:Kimberly.Kelley@charlottecountyfl.gov">Kimberly.Kelley@charlottecountyfl.gov</a>	575-3613
Jim Zwitzyg	zwitzyg@zwitzyg.com	970-768-0819
James T. Wilson, MD	jtmaine@yahoo.com	207-653-3191
Tom Rice	ricefom@aol.com	941-268-5514
Bob Howell	RHOWELL4@msn.com	813-340-3710
William Smith	WJSMITH47@GMAIL.COM	248-412-7805
Ron Thomas	RONALDTHOMAS28@Comcast.net	781-706-7135
Tom Vashaw	Tom Vashaw, 31 Wilder Floor	508-208-7289
David Hunter	ddhunter@att.net	231-633-1451
Ron Coghlin	rcoghlin@mfs1ta.ca	941-830-8918
Chai McCullough	touchbelize@yahoo.com	920-843-8908
Dave McCullough	dmcc1945@yahoo.com	920-901-4818
Scott Turner	STURNER51439@GMAIL.COM	586-610-0435
Jim Pierce	JIPierce57@gmail.com	715-379-4607
Rae Lukan	raelukan@gmail.com	585-739-2928
Shelley Shutes	shshutes@comcast.net	612-308-6267



NAME (please print)	Email Address	Telephone Number
ARTHUR HANSON		941-528-7447
Ray Slade	Raymond.Slade@charlottesvilleVA.gov	941-575-3185
DIANE B. BETTS	LAURANCEBETTS@COMCAST.NET	941-214-8098
Rose Ann Nikolich	nikolichd@aol.com	941-697-1533
Anna Harley	naxosdk@aol.com	
Charles Lawrie	clawrie2017@gmail.com	248-224-4444
REX COLBECK	REXCOLBECK@AOL.COM	517-449-0002
LYNN COLBECK	LYNNCOLBECK@AOL.COM	517-285-5793
Joe Bellman	JBellman@yahoo.com	578-536-0968
Paul Bellman	"	578-536-0968



**AGENDA**  
**PLACIDA AREA STREET & DRAINAGE**  
**MUNICIPAL SERVICE BENEFIT UNIT (MSBU)**

**ADVISORY BOARD REGULAR MEETING**  
**WEDNESDAY, APRIL 12, 2023**

**1:30 p.m., Mac V. Horton, West County Annex, Room 120**  
**6868 San Casa Dr., Englewood, Florida**

**BOARD MEMBERS:** Jim Zwetzig, Chair  
Arthur Hanson, Vice Chair  
Thomas Rice  
William Smith  
Bob Howell

**COUNTY STAFF:** Kimberly Kelley – Community Liaison

**PURPOSE:** Regular Meeting

1. Call to Order / Roll Call
2. Pledge of Allegiance
3. Changes to the Agenda
4. Traffic Safety – Transportation Engineer
5. Citizen Input on Agenda Items (3-Minute Limit)
6. Approval of Minutes: February 1, 2023
7. Unfinished Business
  - a. Bridge Maintenance Plan
  - b. Sidewalk Project/Gasparilla Pines Blvd.
  - c. Maintenance of Streets and Drainage
8. New Business
  - a. Financial Reports
9. Citizen Input on MSBU Items (3-Minute Limit)
10. Advisory Board Open Discussion
11. Meeting Schedule / Items for Next Agenda
12. Motion to Adjourn

**MINUTES  
PLACIDA AREA STREET & DRAINAGE  
MUNICIPAL SERVICE BENEFIT UNIT (MSBU)**

**ADVISORY BOARD REGULAR MEETING  
WEDNESDAY, FEBRUARY 1, 2023**

**1:30 pm – 2:37 pm  
Mac V. Horton, West County Annex, Room 120  
6868 San Casa Drive, Englewood, Florida**

**Members Present:** William Smith, Chair  
Arthur Hanson, Vice Chair  
Tom Rice  
Jim Zwetzig

**Members Absent:** None

**County Staff:** Kimberly Kelley, Community Liaison

**Guests:** Sign-in sheet attached

**Call to Order / Roll Call:**

The meeting was called to order at 1:30 p.m. A roll call was taken, and a quorum was present.

**Agenda / Motion to Approve Changes:**

None

**Sunshine Law/Roberts Rules:**

Per the Florida Sunshine Law outlined in Florida Statutes Chapter 286, Florida Public Records Law outlined in Florida Statutes Chapter 119 and Roberts Rules, mandatory training provided each year during the Advisory Board meeting in December or soon thereafter was completed by Advisory Board members in attendance.

**Election of Officers:**

Mr. Rice nominated Mr. Zwetzig for Chair, no other nominations.  
Mr. Smith nominated Mr. Hanson for Vice Chair, no other nominations.  
Mr. Zwetzig accepted Chair and Mr. Hanson accepted Vice Chair and it was unanimously approved.

**Citizen Input on Agenda Items Only (3 Minute Limit):**

None

**Approval of Minutes:**

The minutes from December 1, 2022, were unanimously approved as submitted.

**Unfinished Business:**

- a) Bridge Maintenance Plan: Ms. Kelley conveyed that the Project Manager has received and reviewed the one hundred percent plans. The next steps are to send to purchasing and have them out to bid for construction.
- b) Sidewalk Project/ Gasparilla Pines: Ms. Kelley conveyed that the Project Manager reviewed the sixty percent plans and there could be some minor adjustments as we move forward to the one hundred percent plans.
- c) Traffic Calming/Safety: Ms. Kelley provided the data collected for Cape Haze Drive indicating no action is warranted at this time. She confirmed the Transportation Engineer would attend the April meeting.

- d) Maintenance of Streets and Drainage: Mr. Rice asked to receive the Lemon Bay Conservancy Preserve updates. Waterway debris and storm debris were briefly discussed.

**New Business:**

- a) Financial Reports: The fiscal year (FY) 2023 quarter one actual expenditure, FY22 annual report and the preliminary FY24/25 budgets reports were provided for review. Ms. Kelley pointed out that in FY25 the reserves do go into the negative as a result of the assessment rate not being increased to support the bridge maintenance project. Mr. Rice motioned to defer any action on the FY24/25 budgets until all project, scenarios and possible sidewalk options (such as phasing the project) are brought forth to make an informed final recommendation, seconded by Mr. Smith and it was unanimously approved.

**Citizen Input on MSBU Items (3 Minute Limit):**

None

**Advisory Board Open Discussion:**

Ms. Kelley asked to move the meeting date from April 26 to a date that would accommodate the Advisory Board in meeting the approval deadlines for the two-year budgets. The Advisory Board members unanimously approved moving the meeting from April 26 to April 12, same time and location.

**Schedule Meetings / Items for Next Agenda:**

Future meetings are scheduled at 1:30 p.m. in the West County Annex conference room as follows:

- Wednesday, April 12, 2023
- Wednesday, August 16, 2023
- Wednesday, November 8, 2023

Submitted by Kimberly Kelley  
Public Works Department

\_\_\_\_\_  
Chair Signature

\_\_\_\_\_  
Date



## Placida Area Street and Drainage MSBU

Fund Financial Report  
Oct. 1 2022 - Dec. 31, 2022

	Actual FY2022	Adopted Budget FY2023	YTD Actual FY2023	Projected FY2023
<b>Beginning Balance</b>	\$ 1,663,735	\$ 1,614,977	\$ 1,907,150	\$ 1,907,150
<b>Revenues</b>				
Assessments & Earnings	467,146	478,492	299,564	478,492
Grant & Subsidy Revenue	-	-	-	-
Loans & Borrowing	-	-	-	-
<b>Total Revenue</b>	\$467,146	\$478,492	\$299,564	\$478,492
<b>Expenditures</b>				
Contract Services	30,127	26,554	-	26,554
Pipe Lining	-	150,000	-	150,000
ROW Maintenance	9,132	11,690	-	11,690
ROW Reclamation	-	-	-	-
Speciality Mowing	36,470	56,514	-	56,514
Public Works Services	81,642	256,564	-	256,564
Internal Charges	2,716	2,852	2,852	2,852
Purchased Services	6,273	14,968	5,877	14,968
Materials and Supplies	-	-	-	-
Capital Outlay	-	-	-	-
Debt Services	-	-	-	-
<b>Project Costs</b>				
Gasparilla Pines Sidewalk	57,373	761,240	22,258	92,768
Placida Bridge Maint. Plan	-	323,788	6,229	54,717
<b>Total Expenditures</b>	\$223,732	\$1,604,170	\$37,215	\$666,626
<b>Reserves (Ending Fund Balance)</b>	\$1,907,150	\$489,299	\$2,169,499	\$1,719,015
<i>Reserve %</i>	89.5%	23.4%	98.3%	72.1%

Date Prepared:

1/31/2023

**Placida Area Street and Drainage MSBU**  
**Preliminary 2 Year Budget**  
**FY2024 & FY2025**

**Estimated ERU's and Cost per ERU**

	FY2024	FY2025
<b>Vacant</b>		
<i>Estimated ERU's</i>	524.120	524.120
<i>Cost per ERU</i>	\$ 235.15	\$ 235.15
<b>Occupied</b>		
<i>Estimated ERU's</i>	1,594.310	1,594.310
<i>Cost per ERU</i>	\$ 235.15	\$ 235.15
<b>Current FY23 Rate</b>	<b>\$ 235.15</b>	
<b>Current Maximum Rate</b>	<b>\$ 235.33</b>	

**Beginning Balance**

	Preliminary Budget FY2024	Preliminary Budget FY2025
	\$ 1,719,016	\$ 343,448

**Revenues**

	Preliminary Budget FY2024	Preliminary Budget FY2025
<b>Assessments &amp; Earnings</b>		
<i>Assessments</i>	498,149	498,149
<i>Interest</i>	6,017	1,203
<i>Net Inc/(Decr) Fair Market Value-Investments</i>	-	-
<i>Misc Rev-Refund Prior Year Exp</i>	-	-
<i>Excess Fees /Tax Collector</i>	-	-
<i>Less 5% Reserve - FS 129.01(2)b</i>	(25,209)	(24,968)
<b>Grant &amp; Subsidy Revenue</b>		
<b>Loans &amp; Borrowing</b>		
<i>Debt Proceeds</i>	-	3,523,000
<b>Total Revenue</b>	<b>\$ 478,957</b>	<b>\$ 3,997,384</b>

**Expenditures**

	Preliminary Budget FY2024	Preliminary Budget FY2025
<b>Contract Services</b>		
<i>Engineering</i>	-	-
<i>Other Contractual Svcs</i>	-	-
<i>Concrete Flatwork</i>	10,000	10,000
<i>Drainage</i>	-	-
<i>Street Sweeping</i>	695	716
<i>Installed Sod</i>	18,750	18,750
<i>Paving</i>	-	-
<b>Contract Services; other</b>		
<i>Pipe Lining</i>	300,000	200,000
<i>Right of Way Maint</i>	-	-
<i>ROW Reclamation</i>	-	-
<i>Specialty Mowing</i>	38,692	39,853



	Preliminary Budget FY2024	Preliminary Budget FY2025
<b>Public Works Services</b>		
<i>Equip Repl Charges-PubWrks</i>	20,080	18,375
<i>Operating Exp-PubWrks</i>	129,646	117,062
<i>Road &amp; Bridge Materials</i>	27,222	18,433
<i>Sign Materials</i>	2,263	2,366
<b>Internal Charges</b>		
<i>Central/Indirect Svcs</i>	4,659	5,035
<b>Purchased Services</b>		
<i>Personal Svcs-InterDept</i>	-	-
<i>Postage</i>	-	-
<i>Utility Service-Electricity</i>	-	-
<i>Advertising-Legal</i>	-	-
<i>Fees-Landfill</i>	5,000	5,000
<i>Collection Fee-Tax Collector</i>	9,963	9,963
<b>Materials and Supplies</b>		
<b>Capital Outlay</b>		
<i>Imprv-Other Than Bldgs</i>	-	-
<b>Debt Services</b>		
<i>Principal</i>	-	-
<i>Interest</i>	-	140,931
<i>Other Debt Service Costs</i>	-	-
<b>Project Costs</b>		
<b><i>Gasparilla Pines Sidewalk</i></b>		
<i>Engineering</i>	59,628	-
<i>Construction</i>	877,000	-
<i>Labor</i>	34,356	-
<b><i>Placida Paving FY25</i></b>		
<i>Paving</i>	-	3,800,000
<i>Rejuvenation</i>	-	-
<i>Labor</i>	-	76,000
<b><i>Placida Bridge Maint. Plan</i></b>		
<i>Engineering</i>	53,835	-
<i>Construction</i>	250,000	-
<i>Labor</i>	12,736	-
<b>Total Expenditures</b>	1,854,525	4,462,484
<b>Reserves (Ending Fund Balance)</b>	\$ 343,448	\$ (121,652)
<i>Reserve %</i>	15.6%	-2.8%

Version Date

1/31/2023



FY2024 Capital Improvements Budget / FY 2024 - FY 2029 Project Detail										Project No.					
GENERAL PROJECT DATA:		Status	In Progress	CONCURRENCY REQUIREMENTS		PROJECT SCHEDULE		PROJECT NEED CRITERIA		FY24 - FY29					
Project Title:		Placida Gasparilla Pines Sidewalk		Does project add new capacity?	Y/N	PROJECT SCHEDULE		PROJECT NEED CRITERIA		FY24 - FY29					
Functional Area:		Placida Gasparilla Pines Sidewalk		Does project add new capacity?	Y/N	PROJECT SCHEDULE		PROJECT NEED CRITERIA		FY24 - FY29					
Department:		Pedestrian Mobility		Is project required to maintain level of service:	Yes/No	PROJECT SCHEDULE		PROJECT NEED CRITERIA		FY24 - FY29					
Location:		Public Works/Engineering		- Within 5 years? List project in CIE	Yes/No	PROJECT SCHEDULE		PROJECT NEED CRITERIA		FY24 - FY29					
PROJECT DESCRIPTION:		Placida MSBU		- From 6 to 10 years? Monitor Annually	Yes/No	PROJECT SCHEDULE		PROJECT NEED CRITERIA		FY24 - FY29					
PROJECT RATIONALE (Include Additional LOS Detail, if necessary):		The project has been requested by citizens within the Placida MSBU.													
OPERATING BUDGET IMPACT:		Mowing and edging of sidewalk will be funded by the MSBU.													
REPLACEMENT COUNTY PROPERTY NO.:															
Calc. for FY24															
Prior Actual	Est FY23	Orig. FY24	Est c/o FY24	New \$ FY24	FY24	FY25	FY26	FY27	FY28	FY29	FUTURE	Total			
EXPENDITURE PLAN (000'S)															
	57			60	60								117		
Design/Arch/Eng															
Land (or ROW)															
Construction			611	266	877								877		
Internal Costs	6		29	5	34								40		
Equipment															
Interest															
Other Fees & Costs															
Total Project Cost	63		700	271	971								1,034		
FUNDING PLAN (000'S)															
MSBU/TU Assessments	63		700	271	971								1,034		
Total Funding	63		700	271	971								1,034		
LOAN REPAYMENT SCHEDULE (000'S)															
Total Loan Repayment															
ANNUAL OPERATING BUDGET IMPACT (000'S)															
Personal Svc.															
Non-personal Capital						10	10	10	11	11			52		
Total Operating						10	10	10	11	11			52		

Capital Maintenance Schedule  
Public Works - MSBU/TU Road Paving  
2024-2025

Project Name	2024	2025	2026	2027	2028	2029	TOTAL
Burnt Store Village/Woodland Estates	211	7	7	6	5	3	239
Cook & Brown Little Farm Paving and Mtc. Program	9	3	2	1	1	0	16
Deep Creek Paving Program	155	55	27	14	1	0	252
Englewood East Paving and Mint Program	0	8,962	890	262	247	230	10,591
Gardens of Gulf Cove Paving Program	0	0	2,236	232	84	79	2,632
Greater Port Charlotte Road Paving Program	8,277	4,607	4,151	4,151	4,151	4,151	29,490
Grove City Paving Program	0	0	5,074	645	164	156	6,039
Harbour Heights Paving Program	337	0	0	0	0	0	337
Lemon Bay Paving and Maintenance Program	6,695	695	189	171	152	133	8,035
Manasota Key Paving Program	12	0	0	0	0	0	12
Neal Road Paving Program	1,632	122	0	0	0	0	1,754
NW Port Charlotte Paving and Maintenance	5,161	82	71	55	28	21	5,418
Peace River Shores Paving Program	10	5	0	0	0	0	15
Pirate Harbor Paving Program	866	74	29	28	26	25	1,048
Placida Paving and Maintenance Program	0	4,017	478	127	119	111	4,851
Punta Gorda Non Urban Paving Program	161	15	6	3	1	0	186
Rotonda Heights Paving Program	32	5	0	0	0	0	37
Rotonda Meadows and Villas Paving and Mint Program	0	0	5,303	231	646	205	6,385
Rotonda West Paving Program	0	17,430	1,651	532	501	469	20,583
South Burnt Store Paving	4,798	406	53	36	19	0	5,312
South Gulf Cove Paving Program Ph 1	151	48	5	0	0	0	204
South Gulf Cove Paving Program Ph 2 and 3	0	0	9,104	10,146	664	0	19,914
South Punta Gorda Heights Paving Program	15	12	10	5	0	0	42
South Punta Gorda Heights West Paving Program	20	15	10	1	0	0	46
Suncoast Blvd Paving and Maintenance Program	8	3	2	2	1	0	16
Tropical Gulf Acres Paving and Mint Program	1,326	0	306	0	0	0	1,632
<b>TOTAL</b>	<b>29,875</b>	<b>36,563</b>	<b>29,605</b>	<b>16,648</b>	<b>6,811</b>	<b>5,583</b>	<b>125,086</b>

Capital Maintenance Schedule  
 Public Works - MSBU/TU Bridges  
 2024-2025

Project Costs (in thousands)

Project Name	2024	2025	2026	2027	2028	2029	TOTAL
Don Pedro Bridge Maintenance Plan	0	53	0	53	0	53	159
Englewood East Bridge Maintenance Plan	2,537	31	47	33	0	0	2,647
GPC Bridge Maintenance and Rehabilitation Program	776	790	705	336	0	0	2,607
Grove City Bridge Rehabilitation	0	110	18	0	0	0	128
Gulf Cove/Englewood East Bridge Maintenance	406	38	0	38	0	0	482
NWPC Bridge Maintenance and Rehabilitation Program	1,581	449	680	0	0	0	2,710
Placida Bridge Rehabilitation Plan	317	0	18	49	0	0	384
Rotonda West Bridge Maintenance Program	9,318	92	171	565	0	0	10,145
South Gulf Cove Bridge Maintenance and Rehabilitation Program	4,030	662	108	329	0	0	5,128
<b>TOTAL</b>	<b>18,964</b>	<b>2,224</b>	<b>1,747</b>	<b>1,402</b>	<b>0</b>	<b>53</b>	<b>24,390</b>



Placida Road Street and Drainage MSBU  
 Projection Maintenance and Sidewalk Schedule -  
 Phased Project  
 as of 3.15.23

	Budget FY2023	Estimated FY2023	\$ 400.00 FY24 Rate				evaluate rate				
			Planned FY2024	Planned FY2025	Projected FY2026	Projected FY2027	Projected FY2028	Projected FY2029	Projected FY2030	Projected FY2031	Projected FY2032
<b>BEGINNING BALANCE</b>	\$ 1,614,977	\$ 1,907,150	\$ 1,880,371	\$ 1,336,531	\$ 1,207,711	\$ 571,696	\$ 717,416	\$ 180,623	\$ 423,434	\$ 644,489	\$ 904,968
<b>OPERATING REVENUES</b>	478,492	488,724	811,256	809,447	826,178	823,952	824,462	822,583	823,433	824,207	825,118
Assessments & Earnings				3,523,000							
External Borrowing											
<b>Total Revenue</b>	\$ 478,492	\$ 488,724	\$ 811,256	\$ 4,332,447	\$ 826,178	\$ 823,952	\$ 824,462	\$ 822,583	\$ 823,433	\$ 824,207	\$ 825,118
<b>OPERATING EXPENDITURES</b>											
Paving/Rejuvenation	323,788	-	337,107	3,800,000	340,000	46,568	15,988	-	16,962	-	107,970
Bridge Maintenance	761,240	-	450,392	-	15,071	-	743,434	-	-	-	-
Sidewalks	519,142	515,503	567,597	520,336	249,014	270,090	247,872	233,729	247,606	234,481	234,820
Other Operating Expenditures					235,000	235,000	235,000	235,000	235,000	235,000	235,000
Principal Pymts (paving)					133,893	126,573	118,960	111,043	102,810	94,246	85,341
Interest Pymts (paving)											
<b>Total Expenditures</b>	\$ 1,604,170	\$ 515,503	\$ 1,355,096	\$ 4,461,267	\$ 1,462,193	\$ 678,231	\$ 1,361,255	\$ 579,773	\$ 602,377	\$ 563,728	\$ 663,131
<b>RESERVE (ENDING FUND BALANCE)</b>	\$ 489,299	\$ 1,880,371	\$ 1,336,531	\$ 1,207,711	\$ 571,696	\$ 717,416	\$ 180,623	\$ 423,434	\$ 644,489	\$ 904,968	\$ 1,066,955
	23.4%	78.5%	49.7%	21.3%	28.1%	51.4%	11.7%	42.2%	51.7%	61.6%	61.7%

Reserve %

Notes:

- Rate increase from \$235.15 FY23 to \$400 FY24
- Projection includes a 15 year paving loan.
- No loan projected for sidewalk project.
- Rate to be reset based upon operational needs in FY29.
- Does not include future costs for pipe lining

Placida Road Street and Drainage MSBU  
 Projection Maintenance and Sidewalk Schedule -  
 Phased Project  
 as of 3.15.23

	Projected FY2033	Projected FY2034	Projected FY2035	Projected FY2036	Projected FY2037	Projected FY2038	Projected FY2039	Projected FY2040
<b>BEGINNING BALANCE</b>	\$ 1,066,955	\$ 1,345,750	\$ 1,613,903	\$ 1,912,893	\$ 2,202,712	\$ 2,461,021	\$ 2,772,195	\$ 3,115,364
<b>OPERATING REVENUES</b>								
Assessments & Earnings	825,685	826,661	827,600	828,646	829,660	830,564	831,654	832,855
External Borrowing								
<b>Total Revenue</b>	\$ 825,685	\$ 826,661	\$ 827,600	\$ 828,646	\$ 829,660	\$ 830,564	\$ 831,654	\$ 832,855
<b>OPERATING EXPENDITURES</b>								
Paving/Rejuvenation	-	19,091	-	20,254	62,584	21,487	-	22,796
Bridge Maintenance	-	-	-	-	-	-	-	-
Sidewalks	235,811	237,970	237,161	237,563	238,592	238,997	241,297	240,475
Other Operating Expenditures	235,000	235,000	235,000	235,000	235,000	235,000	235,000	233,000
Principal Pymts (paving)	76,079	66,447	56,429	46,011	35,176	23,907	12,188	1,000
Interest Pymts (paving)								
<b>Total Expenditures</b>	\$ 546,890	\$ 558,508	\$ 528,610	\$ 538,827	\$ 571,351	\$ 519,391	\$ 488,485	\$ 497,270
<b>RESERVE (ENDING FUND BALANCE)</b>	\$ 1,345,750	\$ 1,613,903	\$ 1,912,893	\$ 2,202,712	\$ 2,461,021	\$ 2,772,195	\$ 3,115,364	\$ 3,450,948
	71.1%	74.3%	78.3%	80.3%	81.2%	84.2%	86.4%	87.4%

**Notes:**

- Rate increase from \$235.15 FY23 to \$400 FY24
- Projection includes a 15 year paving loan.
- No loan projected for sidewalk project.
- Rate to be reset based upon operational needs in FY29.
- Does not include future costs for pipe lining

Placida Road Street and Drainage MSBU  
 Projection Maintenance and Sidewalk Schedule -  
 Project in FY24  
 as of 3.15.23

	Budget FY2023	Estimated FY2023	Planned FY2024	Planned FY2025	Projected FY2026	Projected FY2027	Projected FY2028	Projected FY2029	Projected FY2030	Projected FY2031	Projected FY2032
<b>BEGINNING BALANCE</b>	\$ 1,614,977	\$ 1,907,150	\$ 1,880,371	\$ 748,908	\$ 519,628	\$ 259,602	\$ 308,128	\$ 421,347	\$ 563,601	\$ 698,046	\$ 857,314
<b>OPERATING REVENUES</b>	478,492	488,724	710,631	706,869	721,026	720,116	720,286	720,682	721,180	721,651	722,208
Assessments & Earnings				3,523,000							
External Borrowing											
<b>Total Revenue</b>	\$ 478,492	\$ 488,724	\$ 710,631	\$ 4,229,869	\$ 721,026	\$ 720,116	\$ 720,286	\$ 720,682	\$ 721,180	\$ 721,651	\$ 722,208
<b>OPERATING EXPENDITURES</b>											
Paving/Rejuvenation	323,788	-	337,107	3,800,000	340,000	46,568	15,988	-	16,962	-	107,970
Bridge Maintenance	761,240	-	939,508	-	15,071	-	-	-	-	-	-
Sidewalks	519,142	515,503	565,479	518,218	257,089	263,449	237,119	232,384	231,964	233,136	233,475
Other Operating Expenditures					235,000	235,000	235,000	235,000	235,000	235,000	235,000
Principal Pymts (paving)					133,893	126,573	118,960	111,043	102,810	94,246	85,341
Interest Pymts (paving)											
<b>Total Expenditures</b>	\$ 1,604,170	\$ 515,503	\$ 1,842,094	\$ 4,459,149	\$ 981,052	\$ 671,590	\$ 607,067	\$ 578,428	\$ 586,735	\$ 562,382	\$ 661,786
<b>RESERVE (ENDING FUND BALANCE)</b>	\$ 489,299	\$ 1,880,371	\$ 748,908	\$ 519,628	\$ 259,602	\$ 308,128	\$ 421,347	\$ 563,601	\$ 698,046	\$ 857,314	\$ 917,736
	23.4%	78.5%	28.9%	10.4%	20.9%	37.5%	41.0%	49.4%	54.3%	60.4%	68.1%

Reserve %

Notes:

- Rate increase from \$235.15 FY23 to \$350 FY24
- Projection includes a 15 year paving loan.
- No loan projected for sidewalk project.
- Rate to be reset based upon operational needs in FY26.
- Does not include future costs for pipe lining



Placida Road Street and Drainage MSBU  
 Projection Maintenance and Sidewalk Schedule -  
 Project in FY24  
 as of 3.15.23

	Projected FY2033	Projected FY2034	Projected FY2035	Projected FY2036	Projected FY2037	Projected FY2038	Projected FY2039	Projected FY2040
<b>BEGINNING BALANCE</b>	\$ 917,736	\$ 1,094,611	\$ 1,260,487	\$ 1,456,841	\$ 1,643,666	\$ 1,798,621	\$ 2,006,078	\$ 2,245,167
<b>OPERATING REVENUES</b>	722,420	723,039	723,619	724,306	724,960	725,503	726,229	727,066
Assessments & Earnings								
External Borrowing								
<b>Total Revenue</b>	\$ 722,420	\$ 723,039	\$ 723,619	\$ 724,306	\$ 724,960	\$ 725,503	\$ 726,229	\$ 727,066
<b>OPERATING EXPENDITURES</b>								
Paving/Rejuvenation	-	19,091	-	20,254	62,564	21,487	-	22,796
Bridge Maintenance								
Sidewalks								
Other Operating Expenditures	234,466	236,625	235,836	236,217	237,247	237,652	239,951	239,130
Principal Pymts (paving)	235,000	235,000	235,000	235,000	235,000	235,000	235,000	233,000
Interest Pymts (paving)	76,079	66,447	56,429	46,011	35,176	23,907	12,188	1,000
<b>Total Expenditures</b>	\$ 545,545	\$ 557,163	\$ 527,265	\$ 537,482	\$ 570,006	\$ 518,046	\$ 487,139	\$ 495,925
<b>RESERVE (ENDING FUND BALANCE)</b>	\$ 1,094,611	\$ 1,260,487	\$ 1,456,841	\$ 1,643,666	\$ 1,798,621	\$ 2,006,078	\$ 2,245,167	\$ 2,476,307
	66.7%	69.3%	73.4%	75.4%	75.9%	79.5%	82.2%	83.3%

Reserve %

**Notes:**

- Rate increase from \$235.15 FY23 to \$350 FY24
- Projection includes a 15 year paving loan.
- No loan projected for sidewalk project.
- Rate to be reset based upon operational needs in FY26.
- Does not include future costs for pipe lining

**Placida Area Street and Drainage MSBU**  
Fund Financial Report - 5 Year Annual Report  
Oct. 1, 2017 - Sept. 30, 2022

	Actual FY2018	Actual FY2019	Actual FY2020	Actual FY2021	Adopted Budget FY2022	Actual FY2022
<b>Beginning Balance</b>	\$ 1,030,771	\$ 877,410	\$ 908,174	\$ 1,299,011	\$ 1,618,249	\$ 1,663,735
<b>Revenues</b>						
<b>Assessments &amp; Earnings</b>						
<i>Assessments</i>	155,102	155,237	489,027	485,709	502,631	484,900
<i>Interest</i>	14,801	18,904	17,861	9,004	5,766	15,869
<i>Net Inc/(Decr) Fair Market Value-Investments</i>	(6,507)	12,116	10,879	(8,903)	-	(36,291)
<i>Misc Rev-Refund Prior Year Exp</i>	-	-	-	-	-	-
<i>Excess Fees /Tax Collector</i>	845	952	-	2,926	-	2,668
<i>Less 5% Reserve - FS 129.01(2)b</i>	-	-	-	-	(25,420)	-
<b>Grant &amp; Subsidy Revenue</b>						
<b>Loans &amp; Borrowing</b>						
<i>Debt Proceeds</i>	-	-	-	-	-	-
<b>Total Revenue</b>	\$ 164,241	\$ 187,208	\$ 517,767	\$ 488,735	\$ 482,977	\$ 467,146
<b>Expenditures</b>						
<b>Contract Services</b>						
<i>Engineering</i>	3,770	-	-	-	-	-
<i>Other Contractual Svcs</i>	-	1,500	-	876	-	2,150
<i>Concrete Flatwork</i>	-	-	276	-	1,000	-
<i>Drainage</i>	-	-	-	-	-	-
<i>Street Sweeping</i>	612	673	673	680	654	489
<i>Installed Sod</i>	200	900	2,400	5,872	24,900	1,680
<i>Paving</i>	-	-	-	-	-	-
<b>Contract Services; other</b>						
<i>Pipe Lining</i>	-	-	-	-	150,000	-
<i>Right of Way Maint</i>	8,300	5,278	10,150	10,085	11,349	9,132
<i>ROW Reclamation</i>	-	-	-	-	-	-
<i>Specialty Mowing</i>	15,770	38,850	41,495	30,545	54,867	36,470
<b>Public Works Services</b>						
<i>Equip Repl Charges-PubWrks</i>	3,477	8,364	4,962	7,570	27,782	5,279
<i>Operating Exp-PubWrks</i>	62,808	90,078	55,104	56,766	195,119	74,190
<i>Road &amp; Bridge Materials</i>	686	3,947	1,170	753	46,567	629
<i>Sign Materials</i>	143	97	58	924	1,729	1,544
<b>Internal Charges</b>						
<i>Central/Indirect Svcs</i>	2,566	2,694	4,376	3,199	2,716	2,716
<b>Purchased Services</b>						
<i>Postage-MSBU Notices</i>	-	-	-	-	-	-
<i>Personal Svcs-InterDept</i>	-	-	-	-	-	-
<i>Postage</i>	-	-	-	-	-	-
<i>Utility Service-Electricity</i>	-	-	-	-	-	-
<i>Advertising-Legal</i>	-	-	-	-	-	-
<i>Fees-Landfill</i>	-	1,132	17	527	5,000	141
<i>Collection Fee-Tax Collector</i>	2,285	2,131	6,250	6,212	10,053	6,132
<b>Materials and Supplies</b>						
<b>Capital Outlay</b>						
<i>Imprv-Other Than Bldgs</i>	-	-	-	-	-	-
<b>Debt Services</b>						
<i>Principal</i>	-	-	-	-	-	-
<i>Interest</i>	-	-	-	-	-	-
<i>Other Debt Service Costs</i>	-	-	-	-	-	-
<b>Project Costs</b>						
<b>Gasparilla Pines Sidewalk</b>						
<i>Engineering</i>	-	800	-	-	117,000	57,373
<i>Construction</i>	216,986	-	-	-	-	-
<i>Labor (not reported separate prior to FY23)</i>	-	-	-	-	-	-
<b>Placida Bridge Maint. Plan</b>						
<i>Engineering</i>	-	-	-	-	65,000	25,808
<i>Construction</i>	-	-	-	-	239,000	-
<i>Labor (not reported separate prior to FY23)</i>	-	-	-	-	-	-
<b>Total Expenditures</b>	317,603	156,444	126,931	124,010	952,736	223,732
<b>Reserves (Ending Fund Balance)</b>	\$ 877,410	\$ 908,174	\$ 1,299,011	\$ 1,663,735	\$ 1,148,490	\$ 1,907,150
<i>Reserve %</i>	73.4%	85.3%	91.1%	93.1%	54.7%	89.5%



ARBORx Tree Services

PO Box 21775  
Sarasota, FL 34276

# Proposal

Date	P#-WO#
3/16/2023	6978 P

<b>Billing Address</b>
Charlotte County Public Works 7000 Florida Street Punta Gorda, FL 33948

<b>Job Location</b>		
Gaspar Dr Placida, FL 33946 Contract Pricing		
<b>Rep</b>	<b>Contact Name</b>	<b>Contact Phone</b>
J	Chuck Peters	941-740-0585

Qty	Description	Each	Total
	<p>Scope Of Work: Remove Australian Pines in right-of-way overhanging roadway. Many pines are hazardous and unstable and some are leaning and may be spring loaded against other trees.</p> <p>Special Instructions: Some MOT will be required and additional signage will be provided to the crew for this project - 65 foot bucket lift required. Larger limbs will need to be rigged down due to tight drop zone less than 10 feet for many of these trees.</p> <p>CONTRACT PRICING (Less potential discount as stated below) ARBORx IS OFFERING A SEASONAL DISCOUNT OF 4% REPRESENTING A SAVINGS OF \$5,016.00 IF PO IS RECEIVED WITHIN 10 DAYS. PROJECT WILL BE INVOICED AT \$120,384.00 IF OFFER IS ACCEPTED BY THE COUNTY.</p>		
104	Remove Hardwood: Remove Australian Pine trees 4-12" DBH and flush cut	175.00	18,200.00
73	Remove Hardwood: Remove Australian Pine trees 12-24" DBH and flush cut	450.00	32,850.00
74	Remove Hardwood: Remove Australian Pine trees 24-36" DBH and flush cut	650.00	48,100.00
21	Remove Hardwood: Remove Australian Pine trees 36"+ DBH and flush cut	1,250.00	26,250.00
	Debris Removal		0.00
	<p>ARBORx Tree Services is very careful not to do any damage, but is not responsible for the following: underground utilities, landscaping, lawns, sprinkler systems, sidewalks, driveways, roads, screens, pool cages, &amp; fences. By signing this Proposal you agree to the terms provided.</p> <p>X _____</p> <p>Date: _____</p> <p>Please provide P.O.# _____</p>		

PROPOSAL IS GOOD FOR 30 DAYS. - PLEASE SIGN AND RETURN			<b>Total</b>	\$125,400.00
<b>Phone #</b>	<b>Fax #</b>	<b>E-mail</b>	<b>Web Site</b>	
941-926-1177	941-926-1121	info@arborxtree.com	www.arborxtree.com	

## Kelley, Kimberly

---

**From:** James Wilson <jtwmaine@yahoo.com>  
**Sent:** Tuesday, April 11, 2023 9:52 AM  
**To:** Kelley, Kimberly  
**Subject:** Australian Pines- Gaspar Drive  
**Attachments:** Letter.Flores 2020.05.28.pdf

**Follow Up Flag:** Follow up  
**Flag Status:** Completed

**Categories:** Red Category

Caution – This email originated from outside of our organization. Please do not open any attachments or click on any links from unknown sources or unexpected email.

---

Good morning Ms. Kelley.

My name is Dr James Wilson and I represent Placida Harbor Club whose property borders Gaspar Drive and Charlotte County Property. I have attempted to contact you several times by phone but have been unsuccessful.

At the April 12 Placida Street and Drainage Maintenance meeting, the issue of existing and dangerous Australian Pines will be discussed.

Attached with this note is a letter from our attorney to Charlotte County in 2020 which called attention to our very real concerns. Charlotte County was supportive at that time. Unfortunately, the Placida area advisory committee voted down the tree removal request despite our concerns.

In the fall of 2022, Hurricane Ian decimated these very same trees, splitting, breaking, and toppling many of them. The insult to our property, consisting of damage solely from said trees, was over \$300,000 to date.

At this point, the arborist contracted by Charlotte County has surveyed the trees, and has documented the situation to be “hazardous” in his report. There are many trees partially fallen, leaning on one another, and “spring loaded” by his documentation.

These trees now pose an even greater threat to life and property than they did in 2020 when our attorney voiced our concerns. It is imperative that they be removed from a safety standpoint for all using Gaspar Drive and for our property, Placida Harbor Club.

I ask that this note and its attachment be forwarded to the 5 committee members such that they have this vital, additional background prior to the meeting on the 12th of April. I am available for any questions that may arise.

Respectfully-  
Dr James Wilson  
11000 Placida Road  
207-653-3191





# The Wotitzky Law Firm

WOTITZKY, WOTITZKY, ROSS, MCKINLEY & YOUNG, P.A.

1107 WEST MARION AVENUE, UNIT 111  
PUNTA GORDA, FLORIDA 33950-5372

WEBSITE: [www.wotitzkylaw.com](http://www.wotitzkylaw.com)

TELEPHONE (941) 639-2171  
FACSIMILE (941) 639-8617

EDWARD L. WOTITZKY\*  
WARREN R. ROSS\*\*  
MICHAEL R. MCKINLEY  
CHEYENNE R. YOUNG  
TAMSEN HAYS

\* FL BAR BOARD CERTIFIED  
REAL ESTATE LAWYER  
\*\* ALSO MEMBER OHIO BAR

LEO WOTITZKY (1912 - 2005)  
FRANK WOTITZKY (1916 - 2013)

May 28, 2020

Charlotte County Administration  
Attn: Hector Flores, County Administrator  
18500 Murdock Circle  
Port Charlotte, Florida 33948

Re: Placida Harbour Condominiums

Dear Mr. Flores:

The undersigned represents Placida Harbour Condominium Association, Inc. Our client is the condominium association responsible for the operation, management, and protection of the Placida Harbour Condominium property located at 11000 Placida Road, Placida, Florida 33946.

The condominium property is bounded to the west by Gaspar Drive. For reference, please find enclosed a GIS map layout showing Gaspar Drive and the Placida Harbour Condominiums.

A number of Australian Pines are located in the Gaspar Drive right of way. Our client has become concerned the size and condition of the Australian Pines creates a risk to the condominium property.

We have been instructed to bring this matter to your attention and to request the removal of the Australian Pines bordering the said condominium property. I understand additional information may be required in these regards; however, the purpose of this letter is to put the County on notice of our client's concerns and to request the removal of the Australian Pines.

We will appreciate your consideration of this request and look forward to hearing from you.

Very truly yours,

Wotitzky, Wotitzky, Ross, McKinley & Young, P.A.

  
Edward L. Wotitzky

ELW/jac  
Enclosure

cc: Client (w/encl.)

G:\Sandy\Associations\Placida Harbour Condo Assoc\2020 Misc\Letter Flores 2020.05.28.docx

ESTABLISHED 1940

PERSONAL INJURY • WRONGFUL DEATH • CIVIL LITIGATION • WILLS, TRUSTS & ESTATE PLANNING • PROBATE • CORPORATION & BUSINESS LAW • CONSTRUCTION LAW • ZONING, LAND USE & ADMINISTRATIVE LAW • REAL ESTATE CLOSINGS • TITLE INSURANCE • REAL PROPERTY LAW • CONDOMINIUM & COMMUNITY ASSOCIATION LAW • DIVORCE, CUSTODY & FAMILY LAW



# Map Layout



May 21, 2020

Property Ownership

Override 1

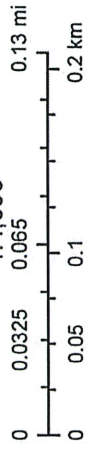
City of Punta Gorda Boundary

Property Ownership

Lots

Block Number

1:4,000



Charlotte County  
Charlotte County GIS