



CITY OF KIRKLAND
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MEMORANDUM

To: Dave Ramsay, City Manager
From: Marilynne Beard, Assistant City Manager
Date: January 7, 2010
Subject: ANNEXATION IMPLEMENTATION POLICY ISSUES AND TIMELINE

RECOMMENDATION:

City Council receives an overview of outstanding annexation policy issues for future Council consideration.

BACKGROUND DISCUSSION:

On December 15, 2009, the City Council approved Ordinance #4229 providing for the annexation of Finn Hill, North Juanita and Kingsgate effective June 1, 2011. Over the past several years, staff identified a variety of policy and operational issues related to annexation which were presented to Council in previous staff reports. The purpose of this memorandum is to identify and briefly describe outstanding policy issues that will require City Council discussion and action over the next 18 months. A summary matrix of the policy issues is included as Attachment A.

In addition to the policy issues noted in this memo, there are operational and transition plans that were developed by City departments that outline steps that staff will need to take to be able to begin service delivery within the larger city boundaries in 2011. Staff is in the process of updating the plans. A copy of the most recent work plans developed in 2009 is included for your information as Attachment B.

In past staff reports, annexation policy issues were presented in five general categories which will be used as a framework for this and future staff reports.

- Financial – One-time and ongoing resources needed to implement and provide ongoing services to a larger city.
- Annexation Process and Legal – Actions needed by the City Council and other agencies to finalize all elements of the annexation.
- Operational – Details and plans for providing services in the annexation area.
- Intergovernmental – Agreements and coordination needed with King County and multiple public agencies currently serving the annexation area.
- Communication and Public Involvement – Information to and involvement of citizens in existing Kirkland and the annexation area and internal City communications.

A summary narrative of policy issues is provided below as well as a summary matrix (see Attachment A). It should be noted that the complexity and impact of the policy issues varies considerably. The following narrative touches only briefly on the array of issues that will come before the Council in the next 18 months. Each policy issue will be presented at a future meeting with a more complete description, analysis and recommendations (where appropriate).

FINANCIAL

State Funding

The availability of the state sales tax credit revenue is key to the City's ability to fund annexation costs for the first ten years. When the legislation was first approved, the State Department of Revenue (DOR) indicated that the funding would be available to cities prior to the annexation effective date to assist with transition costs. More recently, DOR indicated that the City cannot begin to collect this revenue until after the effective date of annexation. The legislation adopting this revenue source does not specifically address this issue. Staff recommends that the City pursue a clarification of legislative intent during the current legislative session to confirm that funding can be accessed prior to the effective date of annexation. Staff will work with local legislators and the Association of Washington Cities on this issue and report back to Council regarding any direct involvement needed by Council to further this important legislative priority.

King County Funding

At one time, King County had reserved up to \$10 million in annexation assistance funding to encourage cities to pursue annexation of unincorporated islands. Although County representatives have informally indicated that funding assistance is still possible, more recent communications were less encouraging. Given the County's financial situation, it may not be realistic to expect the level of financial assistance that may have been available three years ago. However, the City should pursue whatever assistance may be possible including transfers of dedicated reserves (e.g. street funds, impact fee revenue) and/or other assets such as property that the City can use now or in the future to offset the cost of annexation (e.g. the Finn Hill fire station site).

Annexation Operating Budget

Staff is currently in the process of updating revenues and expenses associated with annexation. Economic conditions have worsened since the last estimates were prepared and the existing City's overall service system was reduced due to continued revenue shortfalls. The annexation budget needs to be recalibrated to the City's new service levels and updated to reflect more current revenue trends. Assuming that annexation revenue trends are similar to the City's trends, then it is likely that services to the annexation area will need to be phased in over a longer period of time.

Annexation Capital Budget and Facilities

The most significant and pressing capital need for annexation is the need for new or expanded facilities to house staff hired to serve the larger City. Plans to expand the City Hall facility, primarily for Police services, were placed on hold pending a decision on annexation. Now that the City is proceeding with annexation, staff will need to prepare plans for interim space (potentially leased space) and permanent space for new staff. Although the cost of new facilities was factored into the annexation budget, current economic realities may necessitate reduced size and functionality of new facilities despite the favorable bid climate. Since new facilities cannot reasonably be constructed prior to the annexation effective date, arrangements for interim facilities may need to be in place.

Another capital budget issue relates to the calculation of impact fees. Transportation and park impact fees are based on new growth-related capacity projects identified in the Capital Facilities Element of the Comprehensive Plan. Staff is exploring ways to implement impact fees as soon as possible by potentially adopting an interim capital plan based on King County's planned capital projects or possibly continuing to apply the County fee in the interim while the capital facilities element is developed.

ANNEXATION PROCESS AND LEGAL

Gambling

The City of Kirkland prohibits card rooms (casinos) from operating within the City limits. King County allows casinos and there is one licensed casino in the annexation area (Caribbean Casino in Kingsgate). In 2009, the State legislature passed legislation allowing cities to grandfather in casinos licensed by the Gambling Commission as of July 26, 2009 and prior to annexation without having to allow additional casinos in the City limits. In July 2009, the City Council passed a resolution indicating its intent to allow the grandfathering of the casino. The most recent annexation financial scenario assumed the City would receive revenue from the existing card room.

The resolution of intent is not binding as the City did not have jurisdiction to approve the grandfathering provision in advance of the annexation vote or the effective date. The City Council will need to approve an ordinance authorizing the casino to continue to operate. This ordinance would need to be acted and made effective coincident with the annexation effective date. Unless the City Council wants to indicate a change in its stated intent, no action is needed until 2011.

Wild Glen Condominiums

At least one outstanding boundary issue remains from the City's initial annexation process with the Boundary Review Board. At the time that the Resolution of Intent to Annex was prepared, staff discovered a discrepancy between the boundary shown in the County's maps compared to Kirkland's map. The subject of the discrepancy is one parcel developed with a condominium complex (Wild Glen Condominiums) located on the northern boundary of the annexation area. The City of Kirkland, the City of Bothell and King County staff made an initial agreement to exclude the parcel from Kirkland's annexation boundary description to be prepared for the

Boundary Review Board. The Boundary Review Board approved the City's annexation proposal as presented (which excluded that parcel). It was determined that, if the annexation was later approved, the area would then be contiguous to the City and Kirkland would pursue annexing the area.

Subsequent to the submittal of the City's annexation proposal to the Boundary Review Board, the City was advised by Fire District #41 that this one parcel would be the only remaining parcel in the district if the annexation were approved. The fire district's interest is to dissolve; however, the district would need to continue to exist unless the parcel was annexed to a City or another fire district. Staff is exploring options for expediting the process of annexing the Wild Glen condominium parcel concurrent with the effective date of the larger annexation, so that the fire district can conclude its dissolution as quickly as possible.

Early Adoption of Selected Zoning Regulations

There has been some discussion about asking King County to adopt selected land use regulations prior to the effective date of annexation. Two examples of policies that the City could ask King County to adopt relate to billboards and cell towers – two areas where Kirkland's regulations are more stringent than King County's. Early adoption of zoning regulations is at the discretion of King County and the City will need to be selective in its requests so that the burden placed on King County's development staff is manageable (since they would need to be reviewing developments against two different zoning codes). Staff will discuss this issue further with King County staff to determine their willingness to consider early adoption of selected regulations and will return to Council with a report and recommendation.

Neighborhood Boundaries

Although the annexation area is generally thought of as three distinct "neighborhoods" – Finn Hill, North Juanita and Kingsgate – those areas may not be logical boundaries for purposes of planning and neighborhood association formation. Typically, Planning staff works with the residents and existing community groups to help identify those boundaries. The City could use the existing (three-area) boundaries for working purposes at this point or could begin defining neighborhood boundaries prior to the effective date. Staff resources needed to support neighborhood association formation and development of neighborhood plans would need to be added before the effective date if the City wants to begin these community processes early. Staff will need to identify the pros and cons of neighborhood boundary designations and return to Council with a recommendation.

OPERATIONAL

Park Properties

The City will need to reach agreement with King County and the Finn Hill Park and Recreation District regarding ownership and maintenance responsibilities for parks and open space properties in the annexation area. There are a total of 10 parks and numerous open space parcels in the annexation area, most of which are owned and maintained by King County. O.O. Denny Park is the one exception, as it is owned by the City of Seattle and maintained by the Finn Hill Park and Recreation District through an annual levy. To date, King County Parks staff indicated that the County plans on transferring all of its parks properties in the annexation area

to the City of Kirkland upon annexation with the exception of Big Finn Hill Park which would remain a regional facility. However, King County may be open to discussing the transfer of Big Finn Hill Park and has also inquired as to whether Kirkland is interested in acquiring the entire East Norway Hill Park site, even though only a small portion of the site is within the annexation area boundaries. Significant maintenance costs are associated with Big Finn Hill and East Norway Hill Park which are not factored into the annexation budget. If King County is interested in transferring the larger parks to Kirkland, the City Council will need to consider the financial implications and the City's capacity to maintain the facilities.

Solid Waste Services

The annexation area is currently served by Allied Waste Services (formerly Rabanco) for solid waste disposal and recycling services under a certificate issued by the Washington Utilities and Trade Commission. State law provides for transfer of solid waste services following an annexation. Under state law solid waste services remain with the existing contractor for seven years, after which customers are transferred to the annexing City's contractor as a means to compensate the existing contractor.

In Kirkland's case, the state law is superseded by a "four-way agreement" that was entered into in 1991 by the cities of Kirkland and Bellevue and their two solid waste contractors, Waste Management and Rabanco (now "Allied Waste"). Under the four way agreement, the annexation area customers transfer to the City's contractor on July 1 or January 1 following the effective date of annexation (whichever is sooner). Given the June 1, 2011 effective date, services would be transferred on July 1, 2011. Waste Management would also be obligated to compensate Allied Waste for the transferred service area. Any deviation from the four-way agreement must be agreed to by all four parties.

Waste Management has expressed concern about the financial feasibility of complying with the four-way agreement. The City of Kirkland's current contract for solid waste services with Waste Management is due to expire on September 30, 2012. The contract is subject to one additional two-year extension under the original terms and conditions at the City's discretion that could extend the contract expiration date to September 30, 2014. The current contract is advantageous to Kirkland customers, with residential rates held comparatively low. If the City reopens the contract to accommodate annexation (other than what is provided in the four-way agreement), the remainder of the contract (and customer rates) are also subject to negotiation. Staff is meeting Waste Management and Allied Waste representatives and will develop a report with options and recommendations for Council consideration.

An additional policy issue related to solid waste collection services is self-hauling. Residents in the annexation area are currently allowed to opt out of curbside waste collection and self-haul waste to a local transfer station. City of Kirkland residential properties are required to subscribe to curbside waste disposal and recycling services. The requirement to subscribe to curbside service supports high recycling diversion rates and prevents residents from stockpiling large amounts of refuse on their properties. Staff will need to develop a communication and implementation plan for implementing this policy in the annexation area.

Fire and Emergency Services

The annexation area is currently served by three fire districts – King County Fire District #41, Woodinville Fire and Life Safety and King County Fire District #34. District #41 and Woodinville Fire and Life Safety each have unique circumstances and issues related to transition.

Fire District #41's boundaries are largely contiguous with the annexation area boundaries (with the one exception noted above for the Wild Glen Condominiums). The City of Kirkland provides fire and emergency medical services to Fire District #41 through a contract. District #41 owns the fire stations and apparatus that serve their area. Several years ago, the District agreed that consolidation of two of the stations (currently Holmes Point and North Finn Hill stations) would be a more cost efficient way to serve the area. The District would build a new station adjacent to Finn Hill Junior High (on Lake Washington School District property). It was later determined that the location did not have adequate sight distance for vehicles exiting the employee parking lot and an alternative location was proposed by King County representatives which is currently part of the Big Finn Hill Park property. The conditions under which the property could be conveyed to the District (and ultimately to the City of Kirkland after annexation) have yet to be determined, including any cost implications for the project which was to be financed and constructed prior to the effective date of annexation. Representatives from Fire District #41 and the City are meeting with King County representatives regarding the property and conditions under which it can be made available and accommodate a fire station. Although this issue is largely one to be resolved between King County and the Fire District, the City of Kirkland will be the ultimate owner and operator of the station and so is participating in the discussions.

A portion of the Woodinville Fire and Life Safety District (WFLSD) is located in the annexation area (approximately ten percent of their total assessed valuation and service area). WFLSD has a station located in Kingsgate which will be within Kirkland's city limits and outside the District boundaries after annexation. After the effective date of annexation, the City of Kirkland will be responsible for providing fire and emergency medical services to the area. State law provides the mechanisms and rules for the transfer of services to take place, however, it also allows considerable latitude to negotiate how and when the transfer is to take place. Earlier annexation financial models assumed that WFLSD would continue to staff the Kingsgate fire station because the station serves a larger area than the portion that would be annexed. In fact, earlier conversations with WFLSD indicated that they had plans to relocate the station in any event, but that it would take approximately five years to do so. As a result, Kirkland's annexation model did not include the cost of providing service to the area by the City for the first five years. Since that time, the District's financial and service needs have changed (largely due to economic conditions that indefinitely stalled the construction of a large development located east of the Kingsgate station). City representatives have been engaged in a mediation process with WFLSD over the past six months to work through a transition plan that meets the requirements of the law, the service needs of the area and the financial capacity of the City and the District. The timing and financing plan for transition of fire and emergency medical services have not been determined at this time. There is strong agreement that assuring continuity of current levels of emergency services to the area is the most important objective.

At the December 15, 2009 City Council meeting, a Councilmember requested that previously provided information related to the transition of fire and emergency medical services resulting from annexation be provided to the Council again. Specifically, the Councilmember asked about a comment under "Items from the Audience" concerning the need to maintain existing emergency services response times. This information is included as Attachment C to this staff report (September 1, 2009 City Council agenda report). Information specific to this issue begins on page 2 of the agenda report.

Cable Services

The annexation area is served by Comcast for cable television and high speed internet services but Verizon does not have a franchise to provide television service in the annexation area. After the effective date of annexation, the City's franchise agreement with Verizon and Comcast will automatically extend to the new area. At that point, residents and businesses in the annexation area will be able to choose between those providers for services, including access to the City's television station broadcasts (KGOV and KLIFE). Interest has been expressed in trying to extend Verizon's services to the annexation area prior to the effective date. More research is needed to understand the legal and technical ramifications of allowing early transition of services.

INTERGOVERNMENTAL

The annexation area is served by King County and nine special purpose districts. There are two utility districts, two school districts, three fire districts, a parks district and a library district. The City of Kirkland has existing relationships and operating agreements with some of the districts, but others are new.

Interlocal Agreements

A series of interlocal agreements will need to be reviewed and approved by the City Council in order to provide for the transition of services and resources. A master interlocal agreement with King County will provide for the transition of services currently provided by the County such as police, surface water, parks, permitting and street maintenance. The interlocal will specify the terms and timelines under which the services will be transferred and any financial considerations that may be agreed to. At an operational level, transfers of equipment, other assets, records and data will be negotiated through staff.

Utility Districts

The annexation area is served by the Northshore Utility District (NUD) and the Woodinville Water District. The City of Kirkland has a franchise agreement in place with NUD for the area of incorporated Kirkland currently served by NUD. The NUD franchise agreement includes a franchise fee paid to the City's General Fund to compensate the City for the use of its right-of-way. The City does not have a franchise agreement with the Woodinville Water District and, consequently, could not initially collect franchise fees. Cities in Washington cannot impose utility taxes on areas served by utility districts. Franchise fees, which are passed along to customers through a district's utility rates, can generate a similar stream of revenue. The City will need to renegotiate the franchise agreement with NUD to reflect the larger service area and will need to

approach the Woodinville Water District to negotiate a franchise agreement in order to collect franchise fees from the area.

A recent court decision regarding compensation to water utilities for fire hydrants also has implications following annexation. Within the City government, utility tax rates can be increased to offset the cost of paying the water utility for the hydrants (with a commensurate reduction in water utility rates). This offset is not as easily accomplished between the City and utility districts, especially when there is no franchise fee in place.

School Districts

The annexation area is currently served by the Lake Washington School District and the Northshore School District. Both districts currently receive school impact fee revenue collected by King County on all new residential development. The City of Kirkland does not impose school impact fees and, unless school impact fees are adopted, both districts stand to lose that revenue source.

Conversely, King County does not impose surface water charges on school districts. The City of Kirkland does impose surface water charges on all public agencies (including itself). The imposition of surface water fees on public agencies will create a new (significant) expense for the districts at the same time a revenue source (vis-a-vis school impact fees) are eliminated. Any change in this policy on the City's part will have implications for the existing surface water utility budget.

COMMUNICATION AND PUBLIC INVOLVEMENT

Communication Plan Update

The City's communication efforts to date have focused on informing the annexation area and Kirkland residents about the impacts of the potential annexation. Now that the City Council has approved the annexation, communication efforts will need to focus on implementation issues, some of which were mentioned earlier in this memo. For some issues, the focus will be on keeping residents and businesses informed about upcoming changes and the status of any unresolved policy issues. In other cases, the focus will be on involving stakeholders in helping to make decisions and to implement services in the area. Staff will prepare a multi-faceted communications plan that will include all of the existing avenues of communication (e.g. annexation list serv and the annexation web page) as well as proposals for new tools and methods to inform and involve annexation area residents and businesses in becoming part of the Kirkland community.

Appointments to Boards and Commissions

One of the communication avenues used in a previous annexation was the temporary expansion of the Planning Commission to include appointees from the annexation area. Annexation area residents currently serve on the Transportation Commission and the Design Review Board. Staff will return with a recommendation regarding the timing and scope of pre-annexation board and commission appointments.

CONCLUSION

The narratives provided above are only intended to briefly identify the policy issues that will come back to the Council over the next 18 months. For each issue, a full staff report including background and recommendations will be prepared. Many of these issues are interrelated and almost all have some sort of financial implication. Staff is in the process of determining the appropriate sequencing and timing of these issues and a schedule will be presented to Council within the next month. The City Manager's Office will continue to provide general oversight for the annexation implementation.

Policy Issue	Status	Lead
Financial		
State Funding —Ability to access state sales tax credit prior to the effective date of annexation.	Exploring potential for statement of legislative intent.	CMO
King County Funding —Availability of transition assistance funding from King County.	Pursuing meeting with King County Executive.	CMO
Annexation Operating Budget —Update of revenue and expenditure projections to reflect current City budget and economic conditions.	Staff currently in process of updating projections.	Finance
Annexation Capital Budget and Facilities —Need to develop interim and long term facility expansions to accommodate new staff and services; development of impact fees.	Staff will develop options based on revised financial projections.	Public Works
Annexation Process and Legal		
Gambling —Approval of ordinance grandfathering existing casino.	Resolution of intent approved in 2009; final action needed upon effective date.	City Attorney
Wild Glen Condominiums —Annexation of parcel needed to allow for dissolution of Fire District #41.	Researching potential for interlocal agreement method of annexation and appropriate timing.	Planning
Early Adoption of Selected Zoning Regulations —Potential for King County adoption of selected Kirkland zoning regulations prior to effective date of annexation.	Need to determine King County’s willingness to pursue.	Planning
Neighborhood Boundaries —Identification of boundaries for future neighborhoods.	Existing boundaries exist; need further staff work and public involvement to identify natural boundaries.	Planning
Operational		
Park Properties —Final determination regarding disposition of park and open space properties to be transferred to City upon annexation.	Preliminary discussions have occurred. Final agreement needed.	Parks and CMO
Solid Waste Services —Transition of waste hauling and recycling services to City vendor; implementation of mandatory garbage.	Discussions beginning now concurrent with consideration of upcoming contract extension.	Public Works

Policy Issue	Status	Lead
Fire and Emergency Medical Services —Acquisition of property for station consolidation within Fire District #41 and transfer of services and assets from Woodinville Fire and Life Safety to Kirkland.	Meetings currently taking place on both issues.	Fire and CMO
Cable Services —Potential for early provision of Verizon cable services and broadcast of City channels in annexation area prior to effective date.	Researching legal and technical feasibility.	Information Technology
Intergovernmental		
Interlocal Agreements —Development of agreements to provide for transfer of services between jurisdictions including timing and financial considerations.	Master interlocal with King County received with Kirkland details to be developed based on agreements.	City Attorney and CMO
Utility Districts —Development/update of franchise agreements including compensation for hydrants.	Preliminary discussions have taken place with both utilities.	Public Works
School Districts —Potential adoption of school impact fees and imposition of surface water management fees.	School impact fees on hold; analysis of financial implications of surface water fees needed.	Planning and Public Works
Communication and Public Involvement		
Communication Plan Update —Update plan to inform and involve annexation area residents and businesses during transition.	Preliminary plan developed; needs update.	CMO
Appointments to Boards and Commissions —Consideration of temporary expansion of boards and commissions to allow for participation of annexation area residents.	Staff recommendation needed.	CMO

ANNEXATION MASTER WORK PLAN

TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
1	COMMUNICATION	CMO		Marie										
1.2	Develop External Outreach Plan	CMO		Marie		x			4/7/2009	5/11/2009	Steering Team		Done	
1.2.1	Key Messages	CMO		Marie		x			4/7/2009	5/11/2009	Steering Team		Done	included in Outreach Plan
1.2.2	Identify Speakers Bureau	CMO		Marie		x			4/7/2009	5/5/2009			Done	included in Outreach Plan
1.2.3	Coordinate Community Meetings in PAA	CMO		Jeannie		x			4/7/2009	5/29/2009			Done	Venues selected
1.2.3.1	Identify Dates	CMO		Jeannie		x			4/7/2009	5/11/2009			Done	6/16, 6/23 & 6/29
1.2.3.2	Secure Locations	CMO		Jeannie		x			4/7/2009	5/11/2009			Done	Venues confirmed
1.2.3.3	Advertise Meeting Times/Places	CMO		Marie		x			5/11/2009	6/10/2009			Done	ongoing until 6/29
1.2.3.4	Postcard mailer	CMO		Jeannie		x			5/15/2009	6/10/2009			Done	Awaiting proof
1.2.3.5	Listserv Notice	CMO		Jeannie		x			5/15/2009	6/29/2009			Ongoing	
1.2.3.6	KGOV & KLIFE TV channels	CMO		Marie		x			5/15/2009	6/29/2009			Ongoing	public meeting info posted
1.2.3.7	Community Meeting #1 (6/18)	CMO		Marie		x			6/18/2009	6/18/2009			Done	
1.2.3.8	Community Meeting #2 (6/23)	CMO		Marie		x			6/23/2009	6/23/2009			Done	
1.2.3.9	Community Meeting #3 (6/29)	CMO		Marie		x			6/29/2009	6/29/2009			Done	
1.2.4	Website Updates (Annexation/News Room)	CMO		Jeannie		x			4/7/2009	5/15/2009			Ongoing	
1.2.4.1	Update Maps	CMO		GIS/Plng		x			4/7/2009	5/15/2009			Done	
1.2.4.2	Update Landing Page	CMO		Jeannie		x			4/7/2009	4/20/2009			Done	Updates as needed
1.2.4.3	Create new links	CMO		Marie		x			4/7/2009	4/20/2009			In Progress	Navigation button to be added to Dept. pages
1.2.4.4	Update FAQ's	CMO		Marie/ Jeannie		x			4/7/2009	5/15/2009	Steering Team		In Progress	Public Safety, Process, Community Involvement, Zoning/Building done by 6/2
1.2.5	Develop Updated Print Material	CMO		Marie		x			4/7/2009	5/15/2009	Steering Team		Ongoing	
1.2.5.1	Print Material Reviewed by PDC	CMO		Robin		x			4/7/2009	5/19/2009	Steering Team		Done	
1.2.5.2	Print Material Production and Mailing	CMO		Jeannie		x			4/7/2009	TBD	Steering Team			
1.2.6	City Update Articles	CMO		Marie		x			4/7/2009	6/30/2009	Steering Team			City Update publication: 6/30, 9/30, 12/31 2009
1.2.7	Response to Citizen Correspondence	CMO		Jeannie	All	x			4/7/2009				Ongoing	
1.2.8	News Releases	CMO		Marie		x			4/7/2009				As needed	
1.3	Develop Internal Communications Plan	CMO		Marie		x			4/7/2009	4/13/2009			Done	
1.3.1	Form Annexation Steering Team	CMO		Marilynne		x			4/7/2009	4/13/2009			Done	meets weekly
1.3.2	Form A-Team and Subcommittees	CMO		Marilynne	All	x			4/7/2009	4/13/2009			Done	meet regularly as needed
1.3.2.1	Communications Subcommittee	CMO		Marie	IT/Fin	x			4/7/2009	5/5/2009			Done	
1.3.2.2	Update Kirknet Annexation Site	CMO		Jeannie	IT	x			4/7/2009				Ongoing	
1.3.2.3	Develop File Storage and Retention Strategy	CMO		Marie	Fin/IT	x			4/7/2009	5/15/2009			Done	TRIM

ANNEXATION MASTER WORK PLAN

TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
2	FINANCIAL ANALYSIS	Finance		Tracey						ongoing				
2.1	Develop Cash Flow Forecast	Finance	Fin Plan	Sri		x			6/1/2009	7/7/2009				
2.1.2	Revenue forecast	Finance	Fin Plan	Sri		x			6/1/2009	7/7/2009				
2.1.2.2	Identify property tax and road tax receipts timeline	Finance	Fin Plan	Sri		x			4/23/2009	5/22/2009			Done	preliminary determination of dates
2.1.2.3	Evaluate fire district property tax timeline	Finance	Fin Plan	Sri		x			4/23/2009	5/22/2009			Done	preliminary determination of dates
2.1.2.4	Identify key dates for state shared revenue	Finance	Fin Plan	Sri		x			4/23/2009	5/22/2009			Done	preliminary determination of dates
2.1.2.5	Meet with State Auditor on sales tax credit rules	Finance	Fin Plan	Sri		x			4/23/2009	5/21/2009			ongoing	initial meeting on 5/21/09; additional meetings to be scheduled
2.1.2.6	Meet with other cities on cash flow	Finance	Fin Plan	Sri		x			4/23/2009	5/22/2009			ongoing	in contact with Auburn & Renton
2.1.2.7	Develop implementation timeline for sales tax credit	Finance	Fin Plan	Sri		x			4/23/2009	6/1/2009			ongoing	additional discussions needed
2.1.2.8	Evaluate franchise fees and gambling tax potential	Finance	Fin Plan	Sri		x			4/23/2009	5/22/2009			ongoing	initial gambling tax estimate in 6/16/09 Council packet
2.1.3	Expenditure forecast	Finance	Fin Plan	Sri	All	x			6/1/2009	7/7/2009				
2.1.3.1	Update staffing plans and phased positions	Finance	Fin Plan	Sri	All	x			6/1/2009	7/7/2009				
2.1.3.2	Incorporate one-time start-up costs	Finance	Fin Plan	Sri		x			6/1/2009	TBD				Roll-up in to Mid-Bi process?
2.1.3.3	Expand facilities financing plan	Finance	Fin Plan	Tracey	PW -Fac/CMO	x			6/1/2009	8/31/2009				
2.1.4	Analyze all impacts of fire district transfers	Finance	Fin Plan	Tracey	Fire/CMO	x			6/1/2009	7/7/2009				
2.2	Develop budget process for pre-annexation needs	Finance	Fin Plan	Sri		x			7/7/2009	9/1/2009				Prior to Mid-Bi Budget call
2.3	Coordinate State Shared Revenues	Finance		Sri	CMO				TBD	TBD				establish early contact with State agencies
2.3.1	Contact OFM	Finance		Sri	CMO/Planning	x			TBD	TBD				need to determine when we're ready to contact State agencies
2.3.2	Contact Department of Revenue (DOR)	Finance		Sri	CMO/Planning	x			TBD	TBD				need to determine when we're ready to contact State agencies
2.3.4	County Distributed Revenues -- Property Tax & Road Tax	Finance		Sri	CMO	x			TBD	TBD				will depend on annexation effective date
2.3.5	County Assessor's Office	Finance		Sri	CMO		x		TBD	TBD				will depend on annexation effective date
2.3.6	County Treasurer	Finance		Sri	CMO		x		TBD	TBD				will depend on annexation effective date

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
3	LEGAL AND ELECTION	City Attorney												
3.1	Prepare for election	City Attorney		Robin	City Clk	x								
3.1.2	Schedule public hearing	City Clerk		City Clerk	CAO	x			4/7/2009	9/1/2009			Done	
3.1.3	Develop legislative actions	City Attorney		Robin	City Clk	x			4/8/2009	7/9/2009			Done	
3.1.4	Contingent Resolution calling for annexation election	City Attorney		Robin	City Clk	x			4/9/2009	7/7/2009	Council		Done	
3.1.5	Final Resolution with ballot title and summary	City Attorney		Robin	City Clk	x				7/21/2009	Council		Done	
3.1.6	File with County Records and Elections	City Clerk		City Clerk	CAO	x				8/14/2009			Done	
3.1.7	Appoint pro and con committees	City Attorney		Robin	City Clk	x				7/7/2009	Council		Done	
3.1.8	Develop explanation for voters' pamphlet Ordinance accepting annexation/effective date	City Attorney		Robin	City Clk	x				8/19/2009	Committees		Done	
3.2		City Attorney		Robin	City Clk		x			12/1/2009	Council		Done	

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
4	ANNEXATION PROCESS													
4.1	Complete Boundary Review Board Process	PCD		Eric S		x			5/8/2009	8/1/2009			Done	
4.1.1	Approve Resolution of Intent	PCD		Robin	CAO	x			4/7/2009	4/7/2009	Council		Done	
4.1.2	File Notice of Intention	PCD		Eric S		x			4/8/2009	4/8/2009			Done	
4.1.3	Notice to special purpose districts/secure letters of support	CMO		Marilynne		x			4/8/2009	6/8/2009			Done	
4.1.4	Prepare BRB presentation and send to BRE	PCD		Eric S	F/B; Police/CMO	x			5/20/2009	5/20/2009			Done	
4.1.5	BRB Public Hearing	PCD		Eric S	F/B; Police/CMO	x			6/8/2009	6/8/2009	BRB		Done	
4.1.6	BRB oral decision	PCD		Eric S		x			6/8/2009	6/10/2009	BRB		Done	
4.1.7	BRB written decision	PCD		Eric S		x			7/9/2009	7/9/2009	BRB		Done	
4.2	Conduct census of PAA	PCD		Eric S				x		TBD				

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
5	INTERGOVERNMENTAL													
5.1	Coordinate with King County	CMO		Erin	All	x						x		
5.1.2	Identify coordinating staff at KC	CMO		Erin		x			5/1/2009	5/21/2009			Done	
5.1.3	Determine funding availability	CMO		Erin	Finance CMO/CAO/HR/ Fin	x			11/4/2009	TBD				
5.2	Woodinville Fire and Life Safety	Fire		Kevin	Fin							x		
5.2.1	Operational Planning	Fire		Kevin	CMO	x			5/1/2009	10/31/2009				
5.2.2	Employee Relations	HR		Bill K.	Fire/CMO	x			5/2/2009	11/1/2009				
5.2.3	Financial Analysis	Finance		Tracey	CMO/Fire	x			5/3/2009	11/2/2009				
5.2.4	Development Preliminary Interlocal Agreement	CAO		Bill E.	Fire/CMO/Fin/ HR	x			5/4/2009	11/3/2009				
5.2.5	Conduct asset valuation	Finance		Tracey		x				TBD				
5.3	Fire District #41	Fire		Kevin	Finance							x		
5.3.1	Conduct asset valuation	Finance		Tracey	Fire		x			TBD				
5.3.2	Continue to assist with station consolidation	Fire		Jack		x				Ongoing				
5.3.3	Develop interlocal agreement	Fire		Kevin	CAO		x							
5.3.4	Employee Relations (potential transfer of employee)	Fire		Kevin	HR			x		TBD				
5.4	Fire District #34											x		
5.4.2	Operational Planning					x								
5.4.3	Develop interlocal agreement						x							
5.5	Northshore Utility District (NUD)	PW		Rob J.	CAO							x		
5.5.1	Review franchise agreement						x							
5.5.2	Update franchise agreement if necessary						x							
5.6	Woodinville Water District	PW		Rob J.	CAO/Finance							x		
5.6.1	Discuss potential for franchise agreement						x							
5.6.2	Develop interim interlocal agreement						x							
5.7	Lake Washington School District	CMO			All							x		
5.7.1	Discuss school resource officer deployment	Police			CMO		x							
5.7.2	Discuss surface water utility charges	PW			CMO		x							
5.7.3	Discuss school impact fee charges	PIng			CMO		x							
5.7.4	Discuss facility use policy	Parks			CMO		x							
5.8	Northshore School District											x		
5.8.1	Discuss surface water utility charges	PW		Rob J.			x							
5.8.2	Discuss school impact fee charges	PCD		Eric S			x							
5.9	Finn Hill Park District	Parks		Jenny	CMO	x						x		
5.9.1	Meet with district regarding OO Denny maintenance	Parks		Jenny	CMO	x			6/1/2009					
5.9.2	Meet with DCNA regarding Juanita Woodlands	Parks		Jenny	CMO	x								

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
6	OPERATIONAL PLANNING													
6.1	Parks and Community Services	Parks	Admin	Jenny										
6.1.1	Meet with King County Parks Director on transfer of Parks	Parks	Admin	Jenny		x			5/1/2009	TBD				
6.1.1.1	Develop Interlocal Agreement for transfer of parks	Parks	Admin	Jenny	CAO		x					x		
6.1.2	Park Operations	Parks	Park Ops	Jason										
6.1.2.1	Begin new employee recruitment process	Parks	Park Ops	Jason	HR		x							
6.1.2.2	Begin interview process	Parks	Park Ops	Jason	HR		x							
6.1.2.3	Hire/Train	Parks	Park Ops	Jason	HR		x							
6.1.3.	Order Fleet /Mowers/Equipment	Parks	Park Ops	Jason	Fleet		x							
6.1.4.	Walk sites to inventory/document site conditions	Parks	Park Ops	Jason		x			6/1/2009	6/1/2009				
6.1.4.1	Develop Park Maintenance Plans	Parks	Park Ops	Jason			x							
6.1.4.2	Meet with King County staff to transfer infrastructure data	Parks	Park Ops	Jason			x							
6.1.4.3	Obtain claim history over last 3-5 years	Parks	Park Ops	Jason	HR		x							
6.1.5	Recreation Services	Parks	Rec	Carrie										
6.1.5.1	Begin new employee recruitment process	Parks	Rec	Carrie	HR		x							
6.1.5.2	Begin interview process	Parks	Rec	Carrie	HR		x							
6.1.5.3	Hire/Train	Parks	Rec	Carrie	HR		x							
6.1.5.4	Expand distribution of Recreation Brochure into PAA	Parks	Rec	Carrie			x	x						
6.1.5.5	Outreach	Parks	Rec	Carrie				x						
6.1.6.	Human Services	Parks	Rec	Carrie				x						
6.1.6.1	Increase hours for Human Services Coordinator	Parks	HS	Carrie				x						
6.1.6.2	Outreach	Parks	HS	Carrie				x						
6.1.7.	Park Planning	Parks	Planning	Michael										
6.1.7.1	Revise Park Impact Fee	Parks	Planning	Michael	Finance		x							
6.1.7.2	Conduct asset evaluation	Parks	Planning	Michael	Finance		x	x						
6.1.7.2	Develop CIP list for use internally for preparation for budget	Parks	Planning	Michael	Finance			x						
6.1.7.3	Revise Parks Open Space Comprehensive Plan	Parks	Planning	Michael	Multimedia			x						
6.1.7.4	Interlocal agreement regarding active projects/grants	Parks	Planning	Michael	Finance		x							
6.1.8.	Facility Needs	Parks												
6.1.8.1	Add work stations @ 505 for new staff	Parks	Rec	Carrie	Facilities/IT		x							
6.1.8.2	Add space for new staff at Park Maint Offices	Parks	Park Ops	Jason	Facilities/IT		x							

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6.2	Police													
6.2.1	Coordinate with King County Sherriff	Police		Markle	CAO/CMO/Fin	x			6/1/2009					
6.2.1.1	Identify primary contact	Police		Markle		x			6/1/2009					
6.2.1.2	Identify KCS capacity to serve PAA during transition	Police/CMO		Markle	Finance	x			6/15/2009					
6.2.1.3	Identify hiring requirements of KCS employees	Police/CAO		Markle/Kenny	CMO/HR	x			6/15/2009					
6.2.1.4	Complete officer hiring process for KCS	Police/HR		Markle			x		TBD					
6.2.2	Begin new employee recruitment process	Police/HR		Markle/Krebs		x			11/1/2009					
6.2.2.1	Begin interview process	Police/HR		Markle/Krebs		x			9/1/2009					
6.2.2.2	Complete background checks	Police		Krebs			x		2/1/2010					
6.2.2.3	Identify and hire laterals	Police/HR		Markle/Krebs			x		4/1/2010					
6.2.2.4	Negotiate with testing contractor	Police		Markle/Krebs		x			7/1/2009					
6.2.2.5	Train PTO's	Police		Krebs/Saloum			x		2/1/2010					
6.2.2.6	Complete Support Staff hire	Police/HR		Markle/Krebs			x		11/1/2010					
6.2.2.7	Complete academy	Police		Krebs/Howell			x							
6.2.2.8	Complete field training	Police		Krebs/Howell			x		12/1/2011					
6.2.3	Space Needs	Police/CMO		Markle	Bldg	x								
6.2.3.1	Property Room Storage	Police/CMO		Markle	Bldg		x							
6.2.4	Order Police Vehicles	Police/Fleet		Markle/Tim L.										
6.2.5	Labor Issues	Police/HR		Markle/Kenny		x			6/1/2009					
6.2.6	School District Issues	Police/CMO		Markle			x		12/1/2009					
6.2.7	NORCOM (Calls for Service increase costs)	Police/Finance		Markle			x		7/1/2010					
6.2.7.1	NORCOM (IT issues & Mapping)	Police/IT		Markle/Cooper			x		1/1/2010					

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
6.3	Development Services													
6.3.1	Public Information - counter/phones	Bldg/PCD/PW				x			5/1/2009	1/1/2011			underway	
6.3.2	Develop interlocal agreement for permit transition	Bldg/PCD/PW		Tom/Nancy/Rob		x			7/1/2009		Council	x		
6.3.3	Process KC permits early	Bldg/PCD/PW					x		11/2/2009	1/1/2011				Depending on interlocal
6.3.4	Agreement with State L&I Electrical	Bldg		Clell			x		7/1/2011			x		
6.3.5	Agreement with King County Health - Plumbing permits	Bldg		Tom P.		x			7/1/2011			x		
6.3.6	Process building and land use permits	Bldg/PCD/PW						x	1/1/2011					
6.3.7	Transfer code enforcement cases	Bldg/PCD/PW		Tom/Nancy			x		7/1/2011			x		
6.3.8	Register RV's in PAA	PCD		Nancy			x		11/2/2009					Depends on annexation zoning
6.3.9	Process code enforcement cases	Bldg/PCD/PW						x	1/1/2011					
6.3.10	Update parcel database	Bldg/PCD/PW		Lorrie			x		7/1/2010	11/1/2010		x		
6.3.11	Get old King County permit history	Bldg/PCD/PW		Lorrie			x		7/1/2010			x		
6.3.12	Provide for staff vehicles	Bldg/PCD/PW			Fleet		x		7/1/2010	1/1/2011				
6.3.13	Space needs and configuration	Bldg/PCD/PW			Facilities			x	1/1/2011					

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6.4	Fire and Emergency Services													
6.4.1	Labor Negotiations	Fire		Kevin N.	HR									
6.4.1.1	Woodinville Fire & Life Safety	Fire		Kevin N.	HR/CMO	x			In progress			x		
6.4.1.2	KCFD #34 (Redmond Fire Dept.)	Fire		Kevin N.	HR/CMO	x						x		
6.4.2	Vehicle needs assessment	Fire		Jack H.	Fleet/Finance	x			7/1/2009	12/30/2009				
6.4.2.1	Purchase vehicles	Fire		Jack & Tim Helen/ Grace	Fleet/Finance		x		7/1/2010	12/30/2010				
6.4.3	Facilities needs	Fire		Jack H.	Facilities		x							
6.4.3.1	Housing of Firefighters & Equipment	Fire		Jack H.	CMO/HR/Fin		x		6/1/2009	12/30/2010		x		
6.4.4	Obtain Firefighter Equipment (SCBA, Turnouts, etc.)	Fire		Jack H.	Finance		x		1/1/2010	12/30/2010				
6.4.5	Begin new employee recruitment process	Fire		Jack H.	HR									
6.4.5.1	Begin interview process	Fire		Jack H.	HR									
6.4.5.2	Complete background checks	Fire		Jack H.	HR									
6.4.5.3	Identify and hire laterals	Fire		Jack H.	HR									
6.4.5.4	Negotiate with testing contractor	Fire		Jack H.	HR									
6.4.5.5	Train Fire Inspectors	Fire		Helen/ Grace	HR/Training									
6.4.5.6	Conduct testing	Fire		Helen/ Grace	HR/Training									
6.4.5.7	Complete hire	Fire		Jack H.	HR		x		8/1/2010	8/30/2010				
6.4.5.8	Complete academy	Fire		Jack H.	HR/Training									
6.4.5.9	Complete field training	Fire		Jack H.	HR/Training		x		9/1/2010	12/30/2010				

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6.5	Public Works	PW	PW	Daryl										
6.5.1	PW - Streets	PW	Streets	Hoppy										
6.5.1.1	Inventory Maps	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			Data is necessary in order to Develop Level of Service
6.5.1.1.2	A) Mowing Map	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.3	B) Street / bridges	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.4	C) Trees	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O, P			
6.5.1.1.5	D) Sidewalks	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.6	E) Paths / Trails	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.7	F) Street lights	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.8	G) Signals & Special Others	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.9	H) Parking Facilities	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.10	I) Snow Routes	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.11	J) R.O.W. Maps / Greenbelts	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.12	K) Medians, Gateways, Roundabouts etc...	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.13	L) Public Owned Anything	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.14	M) Irrigation	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.1.15	N) Signs / Striping / Markings	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.2	Condition Ratings	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O			
6.5.1.2.1	Ongoing Programs that differ from C.O.K.	PW	Streets	Hoppy	GIS		X		6/1/2010	1/1/2011	O, P			
6.5.2	PW - Facilities	PW	Facilities	Donna										
6.5.2.1	Update Space Needs Assessment	PW	Facilities	Donna	All City Depts	X			4/1/2009	6/30/2010	O		Ongoing	City Hall, Annex, 505, Public Works and Parks Maintenance, Maintenance Yard, Court. Working on current square footage info by department to compare to space needs assessment update based on depts' projected needs. Pending updates on projected staffing levels.
6.5.2.2	Identify current inventory of space	PW	Facilities	Donna			X		Ongoing	6/30/2010	O		Ongoing	
6.5.2.3	Identify need for leased space	PW	Facilities	Donna			X		Ongoing	9/30/2010	O		Ongoing	
6.5.2.4	Assist with Fire Station 25 Design & Construction	PW	Facilities	Donna	FD 41, Fire & Building	X			Ongoing	TBD	O		Ongoing	Need timing for start of construction. Will we assume the responsibility to construct the fire station with annexation?
6.5.2.5	Reallocate space in existing and acquire additional facility space as needed	PW	Facilities	Donna			X		1/1/2010	5/14/2011	O			
6.5.2.6	Hire new Facilities Staff	PW	Facilities	Donna	HR		X		6/30/2010	9/30/2011	O			
6.5.2.7	Meetings with King County Counterpart	PW	Facilities	Donna			X		Ongoing	?	O		Ongoing	Determine if any KC owned building facilities/rental property in PAA to be transferred to COK. No known building

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6.5.3	PW - Fleet	PW	Fleet	Donna										
6.5.3.1	Price out all new vehicles as of annexation date.	PW	Fleet	Donna	User Depts	X			1/1/2010	4/1/2010				
6.5.3.2	Determine needed delivery dates of new vehicles.	PW	Fleet	Donna	User Depts		X		1/1/2010	4/1/2010				
6.5.3.3	Determine source and timing of vehicle ordering.	PW	Fleet	Donna	Fleet		X		1/1/2009	4/1/2010				
6.5.3.4	Hire new Fleet Staff	PW	Fleet	Donna	HR		X		6/1/2010	1/1/2011				
6.5.4	PW - Engineering	PW	Dev Eng	Rob J.										
6.5.4.1	Prepare legal description	PW	Dev Eng	Rob J.										
6.5.4.2	Woodinville Water Franchise Agreement	PW	Dev Eng	Rob J.	IT		X		5/1/2009			X	Ongoing	Met with WWD on 5/11/09. 1900 water connections in PAA. No letter of support at this time. E-mailed NUD franchise agreement to them to review as boilerplate
6.5.4.3	NUD Water Franchise Agreement	PW	Dev Eng	Rob J.			X		5/1/2009					Met w/ NUD on 5/6/09. No major issues to resolve. They will draft letter of support for annexation and send to Erin.
6.5.4.4	Millennium Digital Media Cable Franchise Agreement	PW	Dev Eng	Rob J.	IT		X							Need to find out more about this Franchise from Janice Perry
6.5.4.5	Hire Development Engineering Staff	PW	Dev Eng	Rob J.	HR		X	X	1/1/2010	12/31/2011	O			
6.5.4.6	Review all Co. Development projects in Maint. Period	PW	Dev Eng	Rob J.			X		1/1/2010		O			
6.5.4.7	Assist Planning and Building with Interlocal - re: permit review	PW	Dev Eng	Rob J.	Plng/Building	X			7/1/2009			X		
6.5.4.8	Assist Building Dept and IT with Permit Software upgraded/changes	PW	Dev Eng	Rob J.	Bldg/IT		X							
6.5.4.9	Respond to phone/counter inquires from PAA citizens	PW	Dev Eng	Rob J.		X			5/1/2009				ongoing	

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6.5.5	PW - Water	PW	Water	Greg										
6.5.5.1	Redmond Water Transfer	PW	Water	Greg	GIS	X			8/1/2009		I	X	ongoing	Need Map of Area Including: Mains, Hydrants, Zone Etc..
6.5.5.1.1	A) Inventory Analysis	PW	Water	Greg	UB		X		1/1/2010		O			Meter Sizes & Addresses - Manufacturer & Serial numbers
6.5.5.1.2	B) Meter Read/Utility Billing	PW	Water	Greg	UB / GIS		X		1/1/2010		O			First read of Meters
6.5.5.1.3	C) Water Capital Plan	PW	Water	Greg	UB/ GIS		X		1/1/2010		O			Gather & Upload info to Springbrook / Hansen
6.5.5.1.4	D) Water transfer subcommittee	PW	Water	Greg	UB/CIP/GIS		X		9/1/2009		O			
6.5.6	PW - Solid Waste	PW	Solid Waste	Rob J.										
6.5.6.1	Service Provider/Customer Transfer	PW	Solid Waste	Rob J.			X	X	TBD	TBD			Ongoing	determine effective date of customer transfer. Per 4-Way Agreement, customer transfer from Allied Waste to Waste Management schedule to occur on July 1, 2011. City is currently exploring possibility of modifying the 4-Way Agreement to which would move the customer transfer date forward to Oct 1, 2014 which is the the end of our current contract with Waste Management. City staff is meeting with Allied Waste and Waste Management to discuss their willingness to renegotiate/modify the 4-Way Agreement.
6.5.6.2	2011-12 Solid Waste Rates	PW	Solid Waste	Rob J.	Finance		X		1/15/2010	3/1/2010				Met on 1/6/10 to discuss needs for 2011-2012 solid waste rate scenarios from consultant that will conduct solid waste rate study. Staff is working on a PSA and scope with consultant to provide rate scenarios.
6.5.6.3	Determine Billing Service Provider	PW	Solid Waste	Rob J.	Finance		X		Ongoing	?			Ongoing	Will meet with Finance to discuss options/will to transfer billing to Waste Management. On hold. City will continue to bill for solid waste for the foreseen future.
6.5.6.4	Long Term Contract Renegotiation	PW	Solid Waste	Rob J.	CAO/Fin			X		9/30/2014			Ongoing	Discuss interest in renegotiating long-term contract to be effective after expiration of second contract extension in Sept 2014.
6.5.6.5	Mandatory Garbage Service/Service Comparison	PW	Solid Waste	Rob J.		X			5/1/2009	6/15/2009			Ongoing	Requested customer data from Allied Waste on 5/1/09. Researching past annexation practice. Approx 1200 self haulers
6.5.6.6	Solid Waste Subcommittee	PW	Solid Waste	Rob J.	Finance	X			6/1/2009	Ongoing			Ongoing	Solid Waste/Annexation Committee reformed and met on 1/6/10.
6.5.7.1	PW - Surface Water - O&M	PW	Surface Water	Bobbi										

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
6.5.7.1.1	Check to see if there's a list of "hot spots" that crews check during storms	PW	Surface Water	Bobbi			x			12/1/2010	O		ongoing	Pulled map from KC Stormwater website of all stormwater complaints from past 5 years. Map shows "hot spots" but will request a list of inspection points during storms.
6.5.7.1.2	Clean all catch-basins/swales & ponds by end of NPDES permit term (2011 – need to check whether the "clock starts over" for annexation areas)	PW	Surface Water	Bobbi	Planning, Engineering, DOE, Police support for occasional traffic control.			x		12/1/2010	P, O		ongoing	There may be compensation given to "catch up" on neglected cleaning & rehab services. Should include swales and ponds. System is in poor condition, cleanings will not be normal labor hours due to sediment in majority of catch Basins inspected for mapping; project display large amounts of hardened build up that will need to be chipped out by hand and removed. Ponds are in poor condition with vegetation control. Many have serious invasive weeds throughout ponds and swales. Clean up will take multi-year effort to get system up to Kirkland standard.
6.5.7.1.3	Gather, review and inspect data on public systems that have been inspected annually per NPDES by County	PW	Surface Water	Bobbi	Engineering, DOE		x			10/1/2010	P, O		ongoing	Need records of cleaning for documentation and base line status
6.5.7.1.4	Conduct further TV inspection and condition rating of system	PW	Surface Water	Bobbi				x			O		ongoing	Completed initial study for spot checking system but will continue to inspect "hot spots"
6.5.7.1.5	Meetings w/ King County Counterpart	PW	Surface Water	Bobbi						12/1/2009			ongoing	Scheduled in next two weeks - however most likely will be a series of meetings - note must gather as-built for our system's data collection.
6.5.7.1.6	Assessment/Condition of system	PW	Surface Water	Bobbi	Engineering		X			10/1/2010				Field mapping is 80% complete. Will begin reviewing data with engineering staff.
6.5.7.1.7	Spec. Equipment and Hire new staff	PW	Surface Water	Bobbi				X		12/1/2011				Review applications, interview, test and reference check candidates (multiple days). Depending on application numbers of qualified candidates.

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6.5.7.2	PW - Surface Water - Engineering	PW	Surface Water	Rob J.										
6.5.7.2.1	Review County Owned Parcels	PW	Surface Water	Rob J.		X					I		ongoing	
6.5.7.2.2	Surface Water Fee Collection	PW	Surface Water	Rob J.		X					I		ongoing	
6.5.7.2.3	Obtain and review historical and existing water quality and drainage complaint files to determine if there are ongoing problems	PW	Surface Water	Rob J.			x				O		ongoing	
6.5.7.2.4	Develop CIP list for use in initial budgeting (i.e. until surface water master plan can be done)	PW	Surface Water	Rob J.	CIP			x			O		ongoing	
6.5.7.2.5	Walk streams to inventory and screen outfalls (NPDES requirement)	PW	Surface Water	Rob J.			x				P, O		ongoing	
6.5.7.2.6	Obtain private system maintenance inspection files from County	PW	Surface Water	Rob J.							O, I		ongoing	
6.5.7.2.7	Look at switching to 2009 King County Surface Water Design Manual to ease transition for those developing in PAA?	PW	Surface Water	Rob J.			x				P		ongoing	
6.5.7.2.8	Develop surface water master plan that looks at needs and recommends programs accordingly	PW	Surface Water	Rob J.				x			P		ongoing	
6.5.7.2.9	Hire New Surface Water Staff	PW	Surface Water	Rob J.	HR		X	X	1/1/2010	12/31/2011			ongoing	
6.5.7.2.10	Juanita Creek Basin Retrofitting Analysis Project	PW	Surface Water	Rob J.							O		ongoing	
6.5.7.2.11	Coordinate Tree Work Plan with Planning	PW	Surface Water	Rob J.	Plng, Streets						O		ongoing	

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TASK #	TASK	DEPT	DIV	LEAD	OTHER DEPT	PRE-ELECTION	PRE-EFFECTIVE	POST-EFFECTIVE	EST. START	EST. COMPLETE	POLICY APPROVAL	ILA	STATUS	COMMENTS
6.5.8	PW - Transportation	PW	Transportation	Godfrey										
6.5.8.1	Review County Road Classifications	PW	Transportation	Godfrey			X		7/1/2009	11/1/2009	P		Ongoing	
6.5.8.2	Revise Traffic Impact fees	PW	Transportation	Godfrey	Planning/Fin		X		7/1/2009	12/1/2010	P		Ongoing	
6.5.8.3	Meetings w/ King County counterpart (transportation Capital)	PW	Transportation	Godfrey			X						Ongoing	
6.5.8.4	Meetings w/ King County counterpart (transportation Maintenance)	PW	Transportation	Godfrey			X						Ongoing	
6.5.8.5	Develop PAA Active Transportation Plan	PW	Transportation	Godfrey			X						Ongoing	
6.5.8.6	Revise Concurrency/Vehicular LOS to incorporate annexation area	PW	Transportation	Godfrey	Planning				1/31/2010	5/15/2011	P			
6.5.9	PW - GIS/Mapping	PW	GIS/Mapping	Ray										
6.5.9.1	School walk routes	PW	GIS/Mapping	Ray				X	9/30/2011	12/30/2011	O		ongoing	
6.5.9.2	Surface water inventory	PW	GIS/Mapping	Ray	SW o&m			X			O		ongoing	
6.5.9.3	Pavement, sidewalk, surface features mapped	PW	GIS/Mapping	Ray	Consultant			X			O		ongoing	
6.5.9.4	Support as identified by other divisions	PW	GIS/Mapping	Ray				X						
6.5.9.5	obtain and scan/inventory record drawings	PW	GIS/Mapping	Ray	Consultant			X	6/30/2011	12/30/2011				Need storage containers and area
6.5.9.6	Obtain and scan/inventory plat maps	PW	GIS/Mapping	Ray	Consultant			X	6/30/2011	12/30/2011				Need storage containers and area
6.5.10	PW - Capital Improvement Division	PW	CIP	Ray										
6.5.10.1	Interlocal with King County regarding active projects/grants	PW	CIP	Ray	CAO, CMO		X		1/1/2010	12/1/2010	I	X	ongoing	
6.5.10.2	Meet with KC CIP project managers re: active projects	PW	CIP	Ray			X		1/1/2010	6/30/2010	O		ongoing	
6.5.10.3	Collect project information for TNR/CFP projects that are unfunded	PW	CIP	Ray			X		3/1/2011	6/30/2011	O		ongoing	
6.5.10.4	Integrate County PMIS with Kirkland PMIS	PW	CIP	Ray	IT			X	9/30/2011	12/30/2011	O		ongoing	
6.5.10.5	Sidewalk defect inventory assembled	PW	CIP	Ray				X			O		ongoing	
6.5.10.6	Pavement Marking basemaps and inventory for bidding	PW	CIP	Ray				X	9/30/2011	12/30/2011	O		ongoing	
6.5.10.7	Coordinate with Surface Water engineering on SW project development	PW	CIP	Ray	SW Eng		X		3/1/2011	6/30/2011	O		ongoing	
6.5.10.8	Coordinate with utilities/agencies on Capital Planning/Projects	PW	CIP	Ray	Devel. Svcs			X	1/1/2012		O		ongoing	
6.5.10.9	Meet with LWSD re: Elementary School Walk Route mapping/designations	PW	CIP	Ray				X	9/30/2011	12/30/2011	O		ongoing	
6.5.10.10	Assess impact fee collection status and timeframes to obligate	PW	CIP	Ray	Finance			X	6/30/2011	9/30/2011	O		ongoing	
6.5.10.11	Attend/formulate community contacts	PW	CIP	Ray				X	9/30/2011	12/30/2011	O		ongoing	
6.5.10.12	Develop a street CIP	PW	CIP	Ray			X						ongoing	
6.5.10.12.1	Determine PAA transportation CIP Revenue (Gas Tax, REET etc.)	PW	CIP	Ray	Finance Traffic		X							
6.5.10.13	Develop a traffic CIP	PW	CIP	Ray	Engineering		X						ongoing	

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6.5.10.14	Develop a Surface Water CIP	PW	CIP	Ray	Surface Water Engineering		X						ongoing	
6.5.10.15	Incorporate AA into 2011-2016 CIP/TIP	PW	CIP	Ray				X						

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6.6	Information Technology													
6.6.1	Develop GIS data and maps	IT	GIS	Xiaoning Jiang	All	x	x	x	1/1/2009	12/30/2011				
6.6.2	Provide communications support for TV, multimedia, web	IT	MMS	Janice Perry	All	x	x	x	1/1/2009	12/30/2011				
6.6.3	Implement application functionality and flow	IT	Apps	Brenda Cooper	All	x	x	x	1/1/2009	12/30/2011				
6.6.4	Support reporting requirements for annexation	IT	Apps	Brenda Cooper	All	x	x	x	1/1/2009	12/30/2011				
6.6.4.1	Update software costs for new annexation staffing levels	IT	ALL	Brenda Cooper			X		1/1/2010	3/31/2010				
6.6.4.2	Hiring	IT												
6.6.4.4	Support for on-boarding new staff	IT	Net Ops	Donna Gaw	HR	x	x	x						
6.6.5	Manage cable franchises	IT	MMS	Janice Perry	Legal		X		1/1/2010					
6.6.6	Identify leases of private telecommunications facilities	IT	MMS	Janice Perry	PW Legal		X		1/1/2010	12/30/2011				First task will be to get a list of existing leases from King County
6.6.7	Complete upgrade of IFAS	IT	Apps	Karen Friesen	Finance	C			started	12/1/2009				Ongoing project
6.6.8	Purchase and deploy new software licenses	IT	Apps & Net Ops	Brenda Cooper			X		1/1/2010	12/30/2011				

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6.7	Human Resources													
6.7.1	Review department hiring plans	HR		Bill/HR Staff	All Depts.				TBD	TBD				
6.7.2	Work with departments on recruitment strategies	HR		Bill/HR Staff	All Depts.				TBD	TBD				
6.7.3	Develop new classifications or reclassifications	HR		HR Staff	As needed				TBD	TBD				
6.7.4	Develop public safety staffing transition plans	HR		Bill/Rod	Police/Fire				TBD	TBD				
6.7.4.1	KC Sheriff to KPD	HR		Bill	Police/CMO	x	x							
6.7.4.2	WFLS to Kirkland Fire	HR		Bill	Fire/CMO	x	x							
6.7.4.3	Coordinate Civil Service process	HR		Rod	Police/Fire		x							
6.7.5	Conduct impact bargaining with all unions	HR		Bill	All Depts.	x	x							
6.7.6	Coordinate with WCIA on risk management issues	HR		Kathy	As needed		x		TBD	TBD				

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6.8	Planning													
6.8.1	Prepare code amendments	PCD	Long Range	Paul S										
6.8.1.1	Complete Annexation Area Zoning Process	PCD	Long Range	Jeremy		x			5/8/2009	7/21/2009				
6.8.1.1.1	Prepare draft comp plan map, zoning code & subd. Ord.	PCD	Long Range	Jeremy		x			5/8/2009	7/21/2009				Initial draft complete
6.8.1.1.2	Issue SEPA DNS	PCD	Long Range	Jeremy		x			5/8/2009	5/22/2009				Comment and appeal period
6.8.1.1.3	Notify CTED	PCD	Long Range	Jeremy		x			5/7/2009	7/6/2009				60 days = 7/6/09
6.8.1.1.4	Council review of Draft Zoning	PCD	Long Range	Jeremy		x			5/8/2009	5/19/2009				
6.8.1.1.5	Open House	PCD	Long Range	Jeremy		x			6/2/2009	6/2/2009				
6.8.1.1.6	Public Hearing #1	PCD	Long Range	Jeremy		x			6/2/2009	6/2/2009				
6.8.1.1.7	Public Hearing #2	PCD	Long Range	Jeremy		x			7/7/2009	7/7/2009				
6.8.1.1.8	Adopt Zoning	PCD	Long Range	Jeremy		x			7/21/2009	7/21/2009	Council			
6.8.1.2	Amend Critical Areas Ordinance	PCD	Long Range	Paul S			x		7/1/2010	12/31/2011				
6.8.1.3	Address School Impact Fees	PCD	Long Range	Eric S			x							Confirm that amendments are needed.
6.8.2	Update Comprehensive Plan (GMA req't)	PCD	Long Range	Paul S										
6.8.2.1	Amend Transportation & Capital Fac. Element	PCD	Long Range	Paul S	PW		x			12/31/2011				
6.8.2.2	Amend all maps to include PAA	PCD	Long Range	Paul S	IT/GIS		x			12/31/2011				
6.8.2.3	Prepare PAA neighborhood plans	PCD	Long Range	Paul S				x						
6.8.3	Amend shoreline master plan	PCD	Long Range	Paul S			x							
6.8.3.1	Identify Shoreline Designations	PCD	Long Range	Paul S			x							
6.8.4	Code enforcement in PAA	Dev. Serv.	Current	Nancy										See 6.3
6.8.5	Permitting	Dev. Serv.	Current	Nancy										See 6.3

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6.9	Finance and Administration	Finance		Tracey										
6.9.1	Determine garbage billing assumptions	Finance		Tracey		x			6/1/2009	7/7/2009				
6.9.2	Determine surface water billing assumptions	Finance		Tracey		x			6/1/2009	7/7/2009				
6.9.3	License businesses	Finance		Michael O				x						
6.9.3.1	Identify businesses	Finance		Michael O			x							
6.9.3.2	Conduct outreach	Finance		Michael O		x								
6.9.3.3	Process licenses	Finance		Michael O				x						
6.9.4	Conduct false alarm registrations	Finance		Michael O				x						
6.9.5	Develop new mail delivery route	Finance		Tracey			x							
6.9.6	Establish cost tracking system for annexation	Finance		Tracey		x								
6.9.7	Secure facilities financing (bonds)	Finance		Tracey			x		TBD	TBD				
6.9.8	Incorporate annexation budget into 2011-2012 budget	Finance		Tracey			x		4/1/2010	12/14/2010				
6.9.9	Support materials and equipment purchasing	Finance		Tracey	All		x		TBD	TBD				
6.9.10	Update Impact Fees	Finance		Tracey	Parks/PW		x		TBD	TBD				
6.9.11	Update Development Services Fees	Finance		Tracey	Plng/F&B/PW		x		TBD	TBD				
6.9.12	Update Parks Fees	Finance		Tracey	Parks		x		TBD	TBD				
6.9.13	Contact utility providers regarding rate changes	Finance		Michael O			x		TBD	TBD				
6.9.13.1	Create list of utility providers	Finance		Michael O			x		TBD	TBD				
6.9.13.2	Identify contacts for utility tax payments at service providers	Finance		Michael O	CMO		x		TBD	TBD				
6.9.13.3	Educate utility providers of need for revenue data	Finance		Michael O			x		TBD	TBD				
6.9.13.4	Develop process for gathering revenue data	Finance		Michael O			x		TBD	TBD				

Fire and Emergency Medical Transition

City staff is continuing to meet with the Woodinville Fire and Life Safety Fire District (WFLS) regarding a plan for service transition should the annexation be approved by voters. Two staff groups with representatives from the District and the City are meeting on a regular basis to identify service delivery options and related issues and to develop financial data that would be needed for an interlocal agreement. Staff from the City and WFLS jointly selected Berk and Associates to assist with development of financial information.

The District and the City are also engaged in a voluntary mediation process to facilitate discussion of the potential transition. Two mediation sessions were held, one on July 12 and another on August 17. In the interim, staff work continues on data development. Agreement was reached during mediation as to work products that would be completed before the next scheduled mediation session. The mediation services are being provided by the King County Dispute Resolution Center (DRC) under an existing interlocal agreement between the City and the DRC.

The City Council also requested information about the City's obligation under new legislation to maintain existing service levels in the PAA. The legislation cited is SSB 5808 which provides for an interlocal method of annexation, potential transfer of fire service employees from districts to the annexing city and provision for continuity of service levels during transition. The specific section related to maintenance of service levels in code cities is shown below:

NEW SECTION. Sec. 10. A new section is added to chapter 35A.14 RCW to read as follows:

(1) If any portion of a fire protection district is proposed for annexation to or incorporation into a code city, both the fire protection district and the code city shall jointly inform the employees of the fire protection district about hires, separations, terminations, and any other changes in employment that are a direct consequence of annexation or incorporation at the earliest reasonable opportunity.

(2) An eligible employee may transfer into the civil service system of the code city fire department by filing a written request with the code city civil service commission and by giving written notice of the request to the board of commissioners of the fire protection district. Upon receipt of the request by the civil service commission, the transfer of employment must be made. The needed employees shall be taken in order of seniority and the remaining employees who transfer as provided in this section and RCW 35.10.360 and 35.10.370 shall head the list for employment in the civil service system in order of their seniority, to the end that they shall be the first to be reemployed in the code city fire department when appropriate positions become available. Employees who are not immediately hired by the code city shall be placed on a reemployment list for a period not to exceed thirty-six months unless a longer period is authorized by an agreement reached between the collective bargaining representatives of the employees of the annexing and annexed fire agencies and the annexing and annexed fire agencies.

(3)(a) Upon transfer, an employee is entitled to the employee rights, benefits, and privileges to which he or she would have been entitled as an employee of the fire protection district, including rights to:

(i) Compensation at least equal to the level of compensation at the time of transfer, unless the employee's rank and duties have been reduced as a result of the transfer. If

the transferring employee is placed in a position with reduced rank and duties, the employee's compensation may be adjusted, but the adjustment may not result in a decrease of greater than fifty percent of the difference between the employee's compensation before the transfer and the compensation level for the position that the employee is transferred to;

(ii) Retirement, vacation, sick leave, and any other accrued benefit;

(iii) Promotion and service time accrual; and

(iv) The length or terms of probationary periods, including no requirement for an additional probationary period if one had been completed before the transfer date.

(b) (a) of this subsection does not apply if upon transfer an agreement for different terms of transfer is reached between the collective bargaining representatives of the transferring employees and the participating fire protection jurisdictions.

(4) If upon transfer, the transferring employee receives the rights, benefits, and privileges established under subsection

(3)(a)(i) through (iv) of this section, those rights, benefits, and privileges are subject to collective bargaining at the end of the current bargaining period for the jurisdiction to which the employee has transferred.

(5) Such bargaining must take into account the years of service the transferring employee accumulated before the transfer and must be treated as if those years of service occurred in the jurisdiction to which the employee has transferred.

NEW SECTION. Sec. 11. *A new section is added to chapter 35A.14 RCW to read as follows:*

Upon the written request of a fire protection district, code cities annexing territory under this chapter shall, prior to completing the annexation, issue a report regarding the likely effects that the annexation and any associated asset transfers may have upon the safety of residents within and outside the proposed annexation area. The report must address, but is not limited to, the provisions of fire protection and emergency medical services within and outside of the proposed annexation area. A fire protection district may only request a report under this section when at least five percent of the assessed valuation of the fire protection district will be annexed.

NEW SECTION. Sec. 12. *A new section is added to chapter 35A.92 RCW to read as follows:*

Code cities conducting annexations of all or part of fire protection districts shall, at least through the budget cycle, or the following budget cycle if the annexation occurs in the last half of the current budget cycle, in which the annexation occurs, maintain existing fire protection and emergency services response times in the newly annexed areas consistent with response times recorded prior to the annexation as defined in the previous annual report for the fire protection district and as reported in RCW 52.33.040. If the code city is unable to maintain these service levels in the newly annexed area, the transfer of firefighters from the annexed fire protection district as a direct result of the annexation must occur as outlined in section 10 of this act.

The legislation requires the City to continue to meet existing response times provided by the existing fire district through the term of the City's budget cycle or provide for a transfer of district employees. Practically speaking, the City has already agreed in principle to hiring any Woodinville firefighters that may be laid off as a result of the annexation. The number of new firefighters budgeted in the annexation model (9 FTE) is more than the number of firefighters

estimated by Woodinville to be impacted by the annexation (6-8 FTE). The City also plans to maintain or improve response times and several service delivery models are being explored with Woodinville to assure response times are met. Further interpretation has been requested from the Municipal Research and Services Center regarding the requirements of this new law.

The City has made every effort to maintain open lines of communications with the district to develop a workable and financially sustainable service transition recommendation. Woodinville district staff has been most helpful in these discussions and we anticipate continued productive planning efforts.

Solid Waste and Recycling Services

A staff subcommittee is working with the City's solid waste contractor regarding transition of solid waste disposal and recycling services. Transition of solid waste services is governed in part by State law as well as contractual provisions in agreements between the City and its waste hauler. There are a number of complex legal, operational and policy issues related to solid waste services.

- One of the policy issues relates to the prohibition against self-hauling garbage within the city limits (also called "mandatory garbage" because the prohibition effectively requires all residents and businesses to pay for solid waste and recycling services). Under King County, PAA residents are not required to subscribe to curbside pick-up but may self-haul to transfer stations. Approximately 10% of PAA residents currently self-haul.
- Another issue is the transition from the current hauler for the area (Allied Waste) and the City's exclusive waste hauler (Waste Management). There will be a need for the City's hauler to "ramp up" to provide service to the PAA including acquisition of new equipment, hiring new personnel and establishing new accounts.
- Finally, there is an issue regarding customer billing services and a decision as to whether the City wants to continue to bill for solid waste and recycling services on the bimonthly utility bill or have the solid waste contractor provide billing services for all City residents (both for the existing city customers and new PAA customers).

Prior to bringing a discussion and recommendation to the City Council, the staff needs to fully explore the legal and service ramifications of the City's policy choices with regard to solid waste service transition and better understand Waste Management's concerns about assuming responsibility for the area.

Effective Date of Annexation

At the June 16 Council study session, staff presented a discussion regarding possible effective dates for annexation. The two driving factors considered in the staff analysis were financial/cash flow impacts and the time frame needed to hire and train police officers to serve the area. If PAA residents vote to annex, the City Council is required to establish an effective date for annexation following the certification of the election results in late November or early December.

An additional factor raised by a resident of the PAA (Toby Nixon) relates to the impact on the eligibility of PAA residents to file for the City Council election. The June 16 study session focused on two possible effective dates – April 1 and July 1, 2011. Because the July 1 effective date creates a slightly better financial outcome, the Council indicated a preference for that date. Mr. Nixon asked for clarification with regard to the relationship between the effective date and the candidate filing period since 2011 will be a City Council election year. The filing period will be in early June. If the effective date is not until July 1, PAA residents will not be eligible to file for election. For this reason, Mr. Nixon asked City Council to reconsider its preferred effective date – changing it to April 1 – in order to allow PAA residents to be eligible to file for the 2011 City Council election.

Funding Request from King County

Several years ago, the City requested funding assistance from King County to help defray the transition costs of annexation. The County offered the City a total of \$1.5 million in County General Fund incentive funding, \$500,000 in street drainage funds and \$500,000 in Real Estate Excise Tax for parks capital needs. The annexation incentive fund of \$10 million has since been dispersed and any remaining amount was reappropriated for other purposes. Nonetheless, the City Council may still want to request assistance from King County to assist with transition services, projects or costs. Although the County's financial situation is dire, there may be uncommitted cash resources, particularly from special purpose (i.e. capital) funding sources that may be available. The attached draft letter includes a request for funding of pre-annexation costs as well as a request to complete all planned and funded capital projects in the PAA. After Council review, the letter (as edited) can be forwarded to King County. Any funding assistance would be secured through an interlocal agreement between the City and King County.

September 2, 2009

D R A F T

The Honorable Kurt Triplett
King County Executive
701 Fifth Avenue Ste 3210
Seattle, WA 98104

Dear Executive Triplett:

As you are aware, the Kirkland City Council has been actively pursuing the potential annexation of the three neighborhoods to our north. The City's potential annexation area (PAA) represents a major increase in population and land area and will require a significant investment of resources.

At their April 7, 2009 meeting, the City Council voted to proceed with filing an annexation proposal with the Boundary Review Board declaring our intent to annex Kirkland's PAA and on July 9, 2009 the Boundary Review Board approved the City's annexation proposal. At their July 21 meeting, the City Council approved a resolution requesting that the King County Council place a measure on the November 3 ballot regarding the question of annexation and the King County Council approved Kirkland's request.

With the decision to proceed with annexation vote, the City of Kirkland would like to request a financial offer letter outlining the County's commitment to provide assistance to Kirkland's annexation efforts. We cannot emphasize enough the importance of a partnership approach to the annexation issue. Kirkland's PAA is one of the largest remaining unincorporated urban areas in King County. The size and scope of Kirkland's PAA presents significant start-up and transition challenges. The City is undertaking a thorough operational planning effort to ensure a smooth transition, and we appreciate the continued assistance that your staff has provided during this planning phase. We will need the County as a strong financial partner if citizens in the PAA vote to proceed with annexation.

The City is aware of the County's financial challenges. Kirkland faces similar challenges. We understand that annexation of large unincorporated urban areas is one of the solutions to the County's budget problem. The City is looking for any kind of financial or in-kind assistance that can be provided during the transition phase of the annexation.

Infrastructure Funding Needs

Previously, the City identified over \$17.8 million in unfunded capital projects in the PAA that were of concern including road and surface water projects. Recognizing the County's current financial difficulties, the City understands that funding for all of these projects is unrealistic. We do believe that it is the County's responsibility to complete projects that are currently funded in the County's Capital Improvement Program. In light of the County's current plans to address some of these needs, we request confirmation of the County's commitment to complete its

currently funded transportation and surface water projects in the annexation area. The City requests assurance that these projects will be complete before the potential annexation date.

The City also requests consideration of providing capital funding from dedicated sources as a means to address future capital needs. Special purpose reserves such as impact fees, real estate excise tax, road funds and surface water reserves could be transferred to the City to the extent that those revenues were raised from the annexation area.

Transition Funding

In order to provide a smooth transition to service delivery in the annexation area, the City will need to begin hiring new staff prior to the effective date of annexation and prior to receiving revenue from the area. Some services will be phased in as resources become available to the City. However, public safety services are essential, and the City will be staffing up to be prepared to provide police service on the effective date of annexation. State annexation funding will be accessed to defray some of these costs; however, in order to maximize the availability of state funding, the City will need to be cautious about accessing the funds too quickly. Our 2010 funding need for Public Safety alone is \$1.33 million. We are requesting any assistance possible from King County to assist in the transition process including General Fund contributions and/or transfer of assets such as surplus properties that do not have operational.

As you know, the City Council carefully scrutinized this annexation because of the magnitude of the issues and its significance to the future of our community. The State of Washington is a critical partner in the annexation effort and the State's 10-year annexation financial assistance will help with essential transition funding if we move forward with annexation. We are hopeful that the County will be a financial partner in this mutual effort as well. Thank you for your consideration.

Sincerely,
Kirkland City Council

by James Lauinger, Mayor

cc: Metropolitan King County Councilmembers
ATTN: Thomas Bristow, Interim Chief of Staff
Saroja Reddy, Policy Staff Director
Anne Noris, Clerk of the Council
Frank Abe, Communications Director
Beth Goldberg, Deputy Director, Office of Management and Budget (OMB)
Elissa Benson, Deputy Director, Office of Strategic Planning and Performance
Management
Karen Freeman, Senior Policy Analyst
Dave Ramsay, City Manager
Marilynne Beard, Assistant City Manager