

TAMPA BAY WATER

Ever wonder how a regional water supply authority can manage 800 active parcels and supply 185 million gallons of drinking water each and every day?

BY LINDA ROBERSON, SR/WA

Tampa Bay Water, formerly known as West Coast Regional Water Supply Authority, was created in 1974 by an interlocal agreement for the purpose of production and delivery of water for its six members. In 1998, the Authority was reorganized into Tampa Bay Water, a governmental entity now recognized as a utility and charged with providing drinking water to six regional areas, including Hillsborough, Pasco and Pinellas counties and the cities of New Port Richey, St. Petersburg and Tampa. The reorganization was completed through governance, an agreement with its members to eliminate rate differentials and provide environmental stewardship in the production and delivery of water.



The C. W. Bill Young Regional Reservoir spans over 1200 acres and holds 15 billion gallons of water – roughly 33 times the volume of a pro-football stadium. Measuring five miles around, there are 1050 acres of wetlands and uplands of preserved land surrounding it.



The Surface Water Treatment Plant covers over 200 acres and can produce up to a capacity of 72 mgd. As the cornerstone of the regional system, it treats water from the Alafia and Hillsborough Rivers, the Tampa Bypass Canal and the Reservoir.



The Seawater Desalination Plant is the largest plant of its kind in North America. A drought-proof component of Tampa Bay Water's drinking water system, it can produce up to 25 mgd and provides six to 10 percent of the region's total drinking water supply.

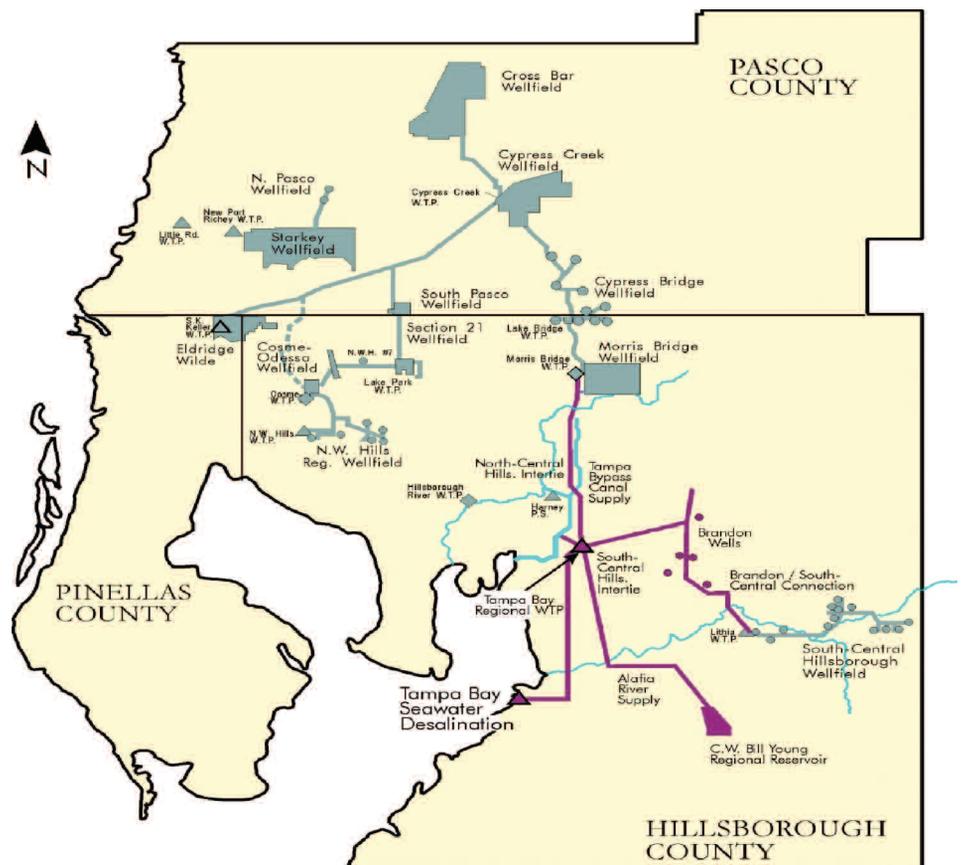
Tampa Bay Water's facilities currently provide 185 million gallons per day (mgd) of drinking water to roughly 2.4 million people. Since 1998, growth of the system has provided service to an additional 600,000 customers, which represents an increased demand of 30 mgd. Tampa Bay Water has also secured nearly \$400 million in Federal, state and Southwest Florida Water Management District funding for capital projects. To handle all of this, we employ only 124 full time employees including myself, the Real Estate Coordinator.

Tampa Bay Water's major facilities include three surface water facilities – a regional reservoir, a seawater desalination plant and a surface water treatment plant. Our groundwater system includes 180

production wells within 13 wellfields throughout the Tampa Bay tri-county area, 1,500 permitted monitoring wells and three water treatment facilities. The pipeline system, which distributes raw and treated water, has 200 miles of pipe, ranging from 16 inches to 84 inches in diameter with seven booster pumping stations. In addition, our 241 buildings total 169,000 sq. ft.

Tampa Bay Water is always reviewing the need for new projects. Presently, there are 32 capital projects and system pipeline interconnects in various stages of development scheduled to be operational by 2011. We are projected to grow at a demand of three mgd per year for at least the next 20 years.

- Existing Supplies
- New Supplies – Regional Water System



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PROPERTY MANAGEMENT PROCEDURES

The property data managed for Tampa Bay Water's facilities includes 570 parcels over 6,000 permanent easement acres, 157 parcels for about 1,700 fee owned acres, 67 parcels over 220 licensed acres, and four parcels over 9,200 acres, which provides restrictive covenant interests over land surrounding production wells for Tampa Bay Water's protection. These restrictive interests were acquired from member governments in 1998, and the governance procedure restricts the type of use permitted for 10 years. We have property interests totaling over 800 active parcels, covering about 17,000 acres acquired with a purchase value of over \$141 million, and we are still growing. As the Real Estate Coordinator, I am part of the Science and Engineering Department and work directly with the project managers for capital funded projects, and with all other Tampa Bay Water departments concerning other property issues such as encroachments, trespassers and co-utility users.

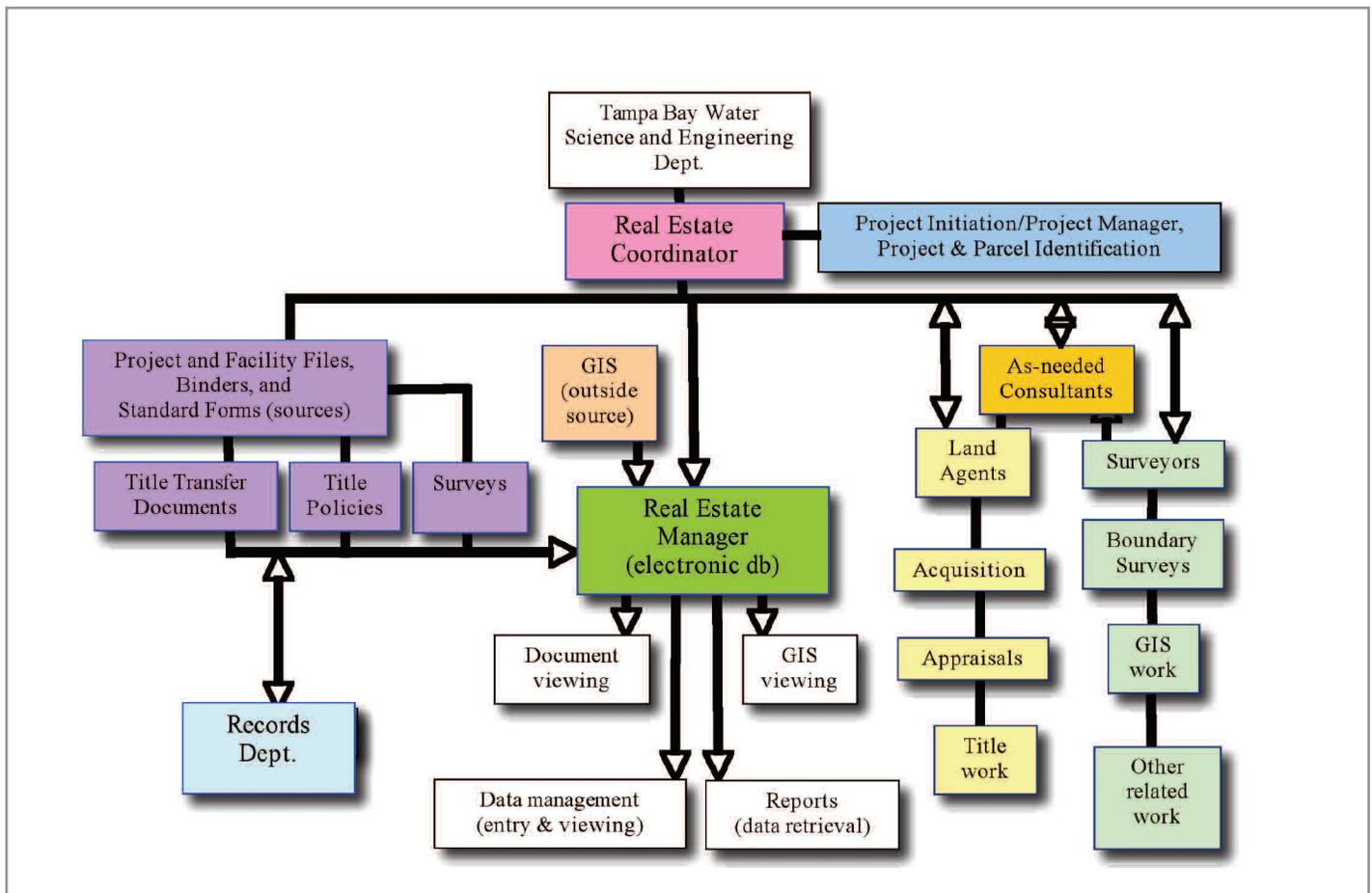
We have created an effective management program using an electronic database, consultant contracts, project files and the use of standardized forms. Data is received from outside sources such as projects, surveys or appraisal information, entered into the real estate manager database, and the information can be easily retrieved by staff.

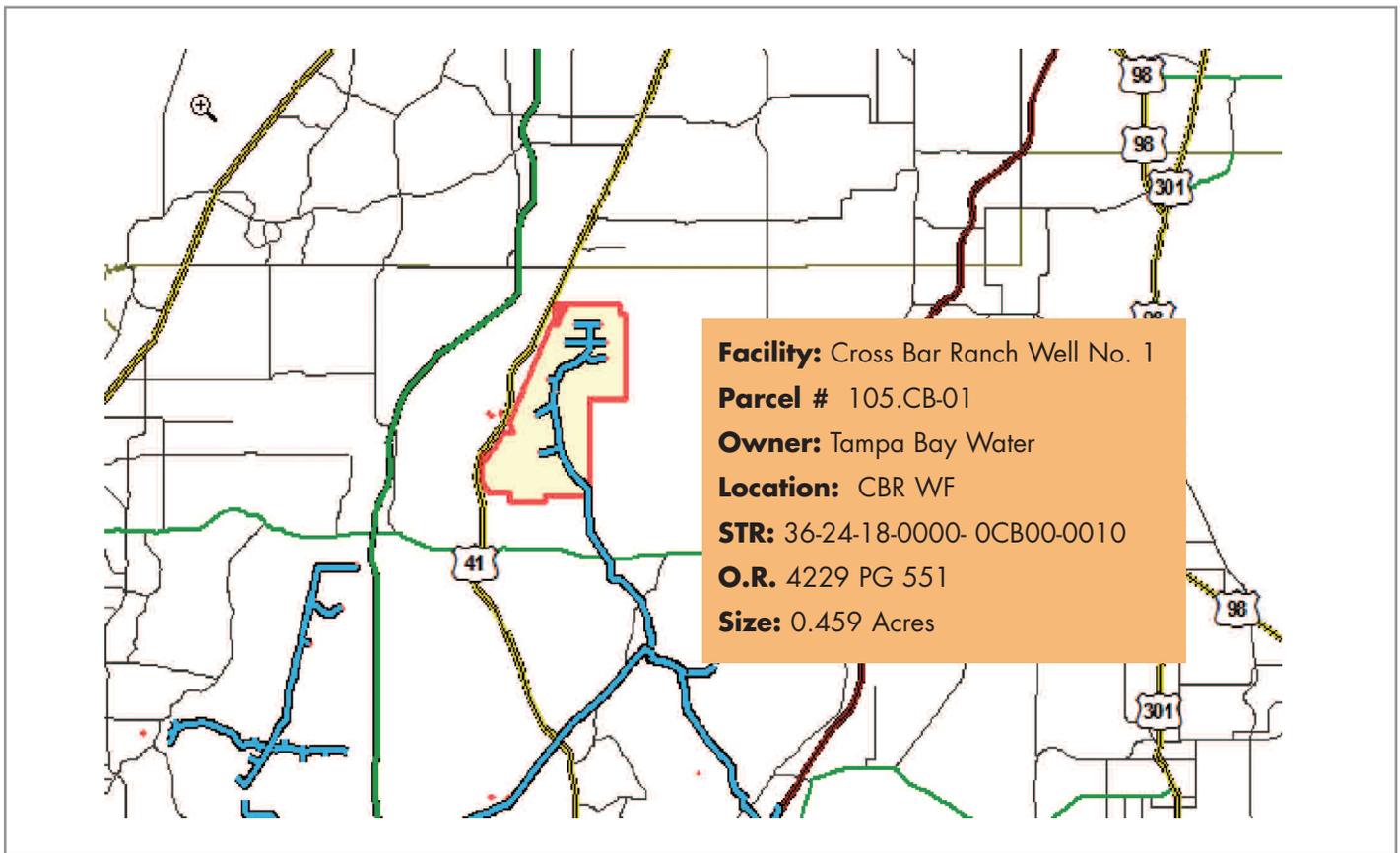
The flow chart below shows the property management relationship from project identification through land acquisition to data management.

A project may be identified in our long term plan or as an individual project with a single parcel. Each project and facility is assigned a permanent number, which follows the parcel throughout its entire lifecycle—from design, through construction to operation.

Project files have been a long-standing management tool in the industry. For Tampa Bay Water, these files are usually prepared by consultants during the Capital Improvement Project (CIP) acquisition stage and delivered upon completion. Once the project becomes an operating facility, Tampa Bay Water's records department retains the original correspondence and title documents in accordance with state and Federal regulations.

An equally significant management tool includes standardized forms used for most property transactions, such as purchase and sale agreements, deeds, and license agreements. Tampa Bay Water often uses a mutual use agreement with a member government or with utility companies for the joint use or co-location of an easement or overlapping, parallel right of way.





CONTRACT CONSULTANTS

Additional coordination duties include managing as-needed consultant contracts which totals \$2.2 million in expenditures. The flow chart (shown left) also shows which services are provided by consultants. Tampa Bay Water currently uses 10 as-needed contracted firms for non-capital funded or independent projects, and occasionally, tasks may include a CIP project with a smaller number of parcels. Land agent services, as expected, include negotiations, title work, appraisal work, closings, and technical or clerical assistance. Standard land agent contracts cover a two-year period at the rate of \$100,000 per contract. The agency will advertise for Statements of Qualifications and then select consultants based on their responses. Typically, Tampa Bay Water utilizes four land agent firms. Title companies and appraisers may be land agent staff or sub-consultants to the land agents.

Tampa Bay Water also uses contracted services for Surveying and Geographical Information Systems (GIS). These services include boundary surveys for fee and CIP projects, topographical work, use of GIS, and vertical and horizontal controls. In our last two-year contract, Tampa Bay Water had over \$92,000 in services. With the existing contract, we anticipate spending roughly \$1.25 million for as-needed surveying services due to the improvement of survey data designed to meet the new Southwest Florida Water Management District standards. As we progress with project planning through the next fiscal year, the need for the forthcoming contract amounts and terms will be determined. For this reason, contract terms and amounts may vary. Our current three-year contract is with six firms for \$300,000 each.

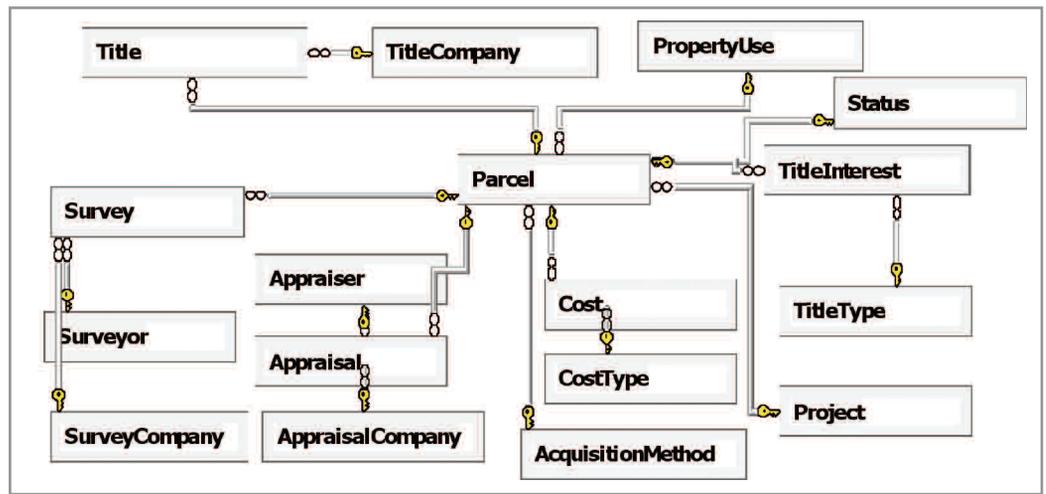
Both land agent and surveying contracts are generally procured by the same method. The process of selecting the as-needed firms is initiated about four months prior to the end of the current contract. The project manager will manage the selection process, appoint a selection committee and assemble an informational package that includes Tampa Bay Water's related policies, guidelines/manual and a questionnaire. Our policy is to post each project advertisement on our website for two weeks prior to beginning the review process. Under the rules of the Sunshine Act, all responses to the ad are reviewed by the selection committee, and the recommended contracts and selected firms are submitted to Tampa Bay Water's Board of Directors for approval.

ELECTRONIC MANGEMENT TOOLS

The information services department provides the real estate division with another important management tool. Tampa Bay Water is working to link our GIS to an electronic database called Real Estate Manager, which will allow employees to view a map like the one above, and automatically link to the general parcel information as shown.

The image above illustrates the Cross Bar Ranch Wellfield and focuses on Well No. 1 data, including parcel number, ownership information, folio number, parcel size and Official Records Book and page number. Conversely, the parcel data can be viewed in the Real Estate Manager database and linked to the corresponding location map.

A sequel server database, like the schematic (shown right), is the preferred method for storing all related property information electronically for over 900 parcels and 18,000 acres, including general property information, survey data, appraisal and title information. The larger numbers in the database include the 800 active parcels over 17,000 acres, as well as any additional non-active parcels. Non-active parcels are those that have been sold, traded, terminated and transferred.



The sequel server produces the Real Estate Manager database. The information is broken down into six sections including parcel, other services costs, survey and appraisal, title (policies) and title interests, documents and full legal description.

THE PARCEL FILE

The parcel file (as shown below) includes all general property information, such as the acquisition method, acreage, location, grantor, grantee and so on. Other services costs primarily show the type of the other party's cost and the date the cost was incurred. Survey data includes the surveyor, company, date of survey, related costs and existing easements. Appraisal data is located in the same section as the survey data and includes any

data related to the appraisal. The title interest file includes title insurance information and the title transfer document's name, date, and recorded Official Records Book and page number.

In the document file, each agreement can be double clicked to bring up a view of the actual instrument. A complete legal description is also available for viewing and describes the parcel for the GIS mapping system.

American Acquisition Group, LLC is currently assisting our agency in this project. Once completed it will show to show the full legal descriptions for all fee and easement parcels in our real estate database. This will bring all our information up to date by the end of the year and will ultimately be linked to the GIS database.

The screenshot shows the 'Real Estate Manager' application. At the top, a table lists several parcels with columns for ParcelID, ParcelNumber, Status, Proj/Facil, ClosingDate, Acres, and Owner. Below the table, a detailed form for parcel 011.01 is displayed, including fields for Parcel Number, Status, Acquisition Method, Property Use, Project/Facility, Acres Bd. Appv., Bd. Appv. Date, Comments, Sec Town Range, Folio Number, Address, Grantor, Grantee, Owner, and Owner Address. The form also includes financial fields like Dep Funds Date, Closing Date, Resolution Date, OT Appv. Date, and various amounts like Eminent Domain Offer, Settlement Amount, and Order of Taking Amount.

ParcelID	ParcelNumber	Status	Proj/Facil	ClosingDate	Acres	Owner
7	011.01	Active	SOUTH PASCO WELLFIELD	8/16/2000	584.53	St. Petersburg, Ci
10	103.01	Active	CYPRESS CREEK WELLFIELD	3/18/1991	62.53	SwFWMD
11	103.02 (13-500-343X)	Active	CYPRESS CREEK WELLFIELD	7/10/1979	1.11	SwFWMD
12	104.02	Active	REGIONAL TRANSMISSION MAINS	2/17/1989	3.44	Tampa Bay Water
15	105.00	Active	CROSSBAR WELLFIELD	9/14/1999	8161.63	Pinellas County
16	1050.06.05	Active	CROSSBAR WELLFIELD	2/17/1997	0	EQUUS Reserve
17	1050.06.03	Active	CROSSBAR WELLFIELD	2/17/1997	0	Leger, Geneva
18	1050.06.02	Active	CROSSBAR WELLFIELD	2/17/1997	0	Seigny, Roger P
19	1050.06.01	Active	CROSSBAR WELLFIELD	2/17/1997	0	Doyle, Priscilla
20	105.01	Active	CROSSBAR WELLFIELD	7/10/1979	1.11	SwFWMD

We also use Crystal Database software to create a variety of transaction reports. These reports can include number of fee parcels, easements, or license agreements in which the agency has an interest, as well as compare data from any timeframe. Reports can be sorted by project or facility name, and can be produced to show various combinations of available data, such as deliverable dates, parcel status and title review.

The sample transaction report (shown right) can be prepared for any number of facilities and for any selected time frame. As an additional management tool, written guidelines have been prepared and coordinated for use by staff and by contracted consultants. Land acquisition and disposition procedures are detailed in our Property Management Guidelines. Our Surveying and Other Related Data Procedures Manual is used by staff and surveyors completing work for Tampa Bay Water. Both guidelines are available on Tampa Bay Water's web site at www.tampabaywater.org.

Project Name	Parcel Nbr	S-T-R	Acquisition Method	Property Use	Acres	Owner	Board Appvd Date	Close Date	Cost of Purchase
CENTRAL PASCO IMPROVEMENTS	6702.01	27-26-17	Fee	Booster Station	1.24	Tampa Bay Water	04/17/2006	08/29/2006	\$9,500.00
CENTRAL PASCO IMPROVEMENTS	6702.01P	27-26-17	Perm Ease	Transmission Main	0.19	Pasco County	04/17/2006	08/29/2006	\$500.00
COSME WELLFIELD	009.08B	14-27-17	None	Access	0.00	Tampa Bay Water	04/15/2007	08/02/2007	-\$2,100.00
CYPRESS BRIDGE WELLFIELD	4290.31 (CY-2)	13-26-19	Fee	Production Well	1.03	Tampa Bay Water	04/17/2006	06/27/2006	\$9,000.00
CYPRESS BRIDGE WELLFIELD	4290.33 (CY-7)	36-26-19	Fee	Production Well	1.00	Tampa Bay Water	04/17/2006	06/27/2006	\$8,700.00
CYPRESS BRIDGE WELLFIELD	4290.34 (CY-6)	31-26-20	Fee	Production Well	1.17	Tampa Bay Water	04/17/2006	08/27/2006	\$8,000.00
LAKE BR WATER TRMT PLANT	4290.102.3	01-27-19	None	Utility Easement	0.00	Tampa Bay Water	06/05/2006	08/30/2006	\$3,517.00
NW HILLSBOROUGH WELLFIELD	112 RMP.09.02	33-27-17	Perm Ease	Access	0.48	Endress, Richard L. and Laurel A., Family Tr	02/28/2005	07/07/2006	\$0.00
ODESSA EMERGENCY RYPASS	6901.01P	26-26-17, 27-26-17	Perm Ease	Transmission Main	2.07	Pasco County	04/17/2006	08/29/2006	\$10.00

PROPERTY ACQUISITION

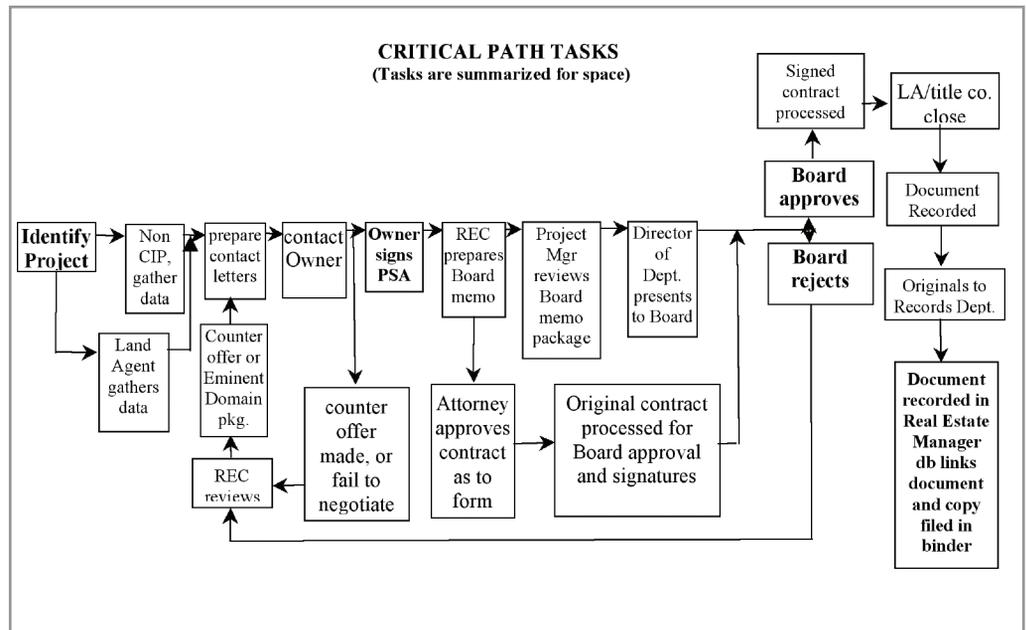
Our property acquisition procedures include typical negotiations, title work, appraisals, closings and eminent domain preparation. The critical path for each stage of the acquisition process is identified, and specific property needs are outlined. Surveys, title work and appraisals are completed and reviewed. Offers are made and counteroffers are considered. Purchase and sale agreements, if signed, are submitted through the Real Estate Coordinator for Board approval. If approved, closings are completed, the originals are forwarded to the records department and recorded data, along with all the other parcel information, is included in the real estate database and filed accordingly.

Tampa Bay Water's acquisition procedures are used for the purchase of fee interest, easements, and licensed or leased areas. Our policy is to purchase a fee interest for permanent structures, such as production wells and buildings, with the exception of two large wellfields. Starkey Wellfield and Cypress Creek Wellfield in Pasco County are licensed from the Southwest Florida Water

Management District. Easement interests are primarily used for pipelines and monitor wells. Currently, the Seawater Desalination plant is the only facility we have on leased land.

CAPITAL IMPROVEMENT PROJECTS (CIP)

CIP projects are performed by engineering consultants. Land acquisition activities may be completed by the real estate staff of a project engineering firm or by its sub-consultants. All CIP project parcel appraisals are completed by an independent appraiser hired by the project engineer. I typically handle the non-CIP acquisition projects myself or assign them to an as-needed consultant. Consultants complete the majority of acquisitions for Tampa Bay Water. From 2005 to 2007 this amounted to 10 tasks costing about \$105,000 each.



An appraisal or an opinion of value is always needed in negotiations. To determine a market value estimated under \$50,000, an opinion of value may be used. However, if the market value is estimated at over \$50,000, an appraisal report by a certified appraiser is required. No eminent domain work is required for non-CIP projects.

Generally, no federal funds are involved in Tampa Bay Water projects, so relocation activities are not required. As a result, only one Tampa Bay Water project has included a relocation parcel to date.

PROPERTY DISPOSITION

Property management for Tampa Bay Water also includes the disposition of property, which consists of the sale of a fee or easement interest, licensing, and leasing of vacant fee owned properties. The best method for disposition is determined by the real estate coordinator and may be sold through an advertisement, public notice, sealed bid or donated to a charity. Once the Tampa Bay Water's Board of Directors approves the selected method, a parcel surplus must be declared prior to any sale. A sale is generally transferred by Quit Claim Deed and sold at market value.

We currently have one leased site to a cell tower company which returns a monthly income to Tampa Bay Water. As part of a negotiated settlement, Tampa Bay Water has also leased a home site back to a seller during the design phase. We have also licensed areas, at no cost, to member governments for location of utilities, and to adjacent property owners for such purposes as agriculture or residential use in order to have the property occupied or maintained. Disposition by sale of properties may be handled by consultants or by local realtors. HDR Acquisition Services, Inc. has assisted us in completing valuations and clearing title issues for the sale of a surplus property.

PROPERTY REDRESS

Tampa Bay Water also uses property redress, which is required when a facility is constructed or obtained without benefit of a property interest and handled as described for non-CIP projects. A facility may have been constructed by another agency and

given to Tampa Bay Water without benefit of an easement, or a pipeline may have been constructed outside of an existing easement leaving the facility vulnerable without the terms of a protective easement. A typical redress project for Tampa Bay Water is the purchase of an easement for a monitor well facility received from a developer or another government. This task is generally assigned to as-needed consultants. Post, Buckley, Schuh & Jernigan, Inc. is currently assisting us with acquiring property interests for several monitor well sites in the tri-county area. Florida Acquisition and Appraisal Incorporated is also assisting us with the purchase of easements for a pipeline located outside of an exiting easement. All of Tampa Bay Water's property transactions are approved by its Board of Directors, which means preparation of a memorandum by the Real Estate Coordinator and exhibits for Board review.

IN SUMMARY

The chart below shows the number of active parcels from 1974, when there was no specific real estate management department, to 1990, when the Real Estate Coordinator position was created, through 2007. The magnitude of property interest growth within this agency is obvious.

	1974	1990	2007 Data Managed	2007 Active Parcels	Variance 1990 to 2007
# of Parcels	80	140	900	800	+ 542%
# of Acres		220	18,000	17,000	+ 8081%
# Annual Board Meetings*	12	12	6		- 50%
# Real Estate Personnel	0	1	1		unchanged

*Board Meetings provide venue for approval of transactions.

Although it's challenging to keep up with a large quantity of work while maintaining our high quality standards, it is Tampa Bay Water's goal to continue to improve our management techniques by becoming electronically oriented. This means we will continue to integrate related database applications, while maintaining the flexibility to adjust as the marketplace evolves.