

A large, stylized graphic in the background features a yellow sun with rays and several green leaves of varying shades, all set against a white background.

Beach Renourishment (DPKI) Bocilla Lagoon

April 7, 2026



CHARLOTTE COUNTY
FLORIDA

MSBUs

- MSBUs
 - Don Pedro/Knight Island Beach Renourishment
 - Bocilla Lagoon Waterway
- Timeline of Key Events

Beach Renourishment MSBU Don Pedro/Knight Island

Purpose of Beach Renourishment

- Purpose of beach restoration
 - To combat the daily erosion
 - Minimize storm impact to the upland structures
 - Assist in the protection of personal property

Beach Renourishment – DPKI

- Combination of storm recovery and daily erosion
 - Restoring and replanting of the dune systems that were lost

Beach Renourishment

- Beach Renourishment Rate Methodology
- Changes to parcels
- Federal, State and County funding
- Rate Comparison between Cycle 1 and Cycle 2



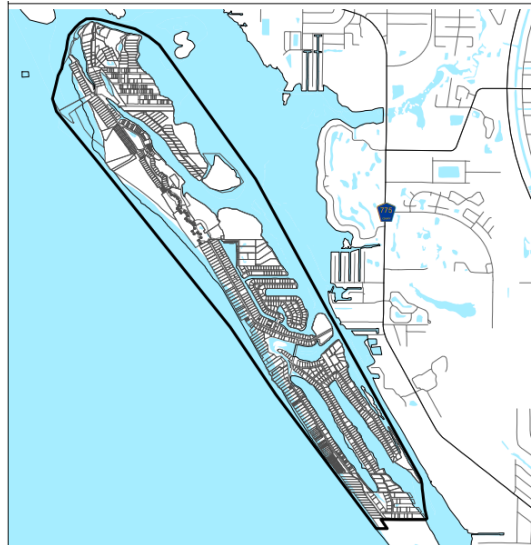
Manasota Key / Don Pedro Beach Renourishment Assessment



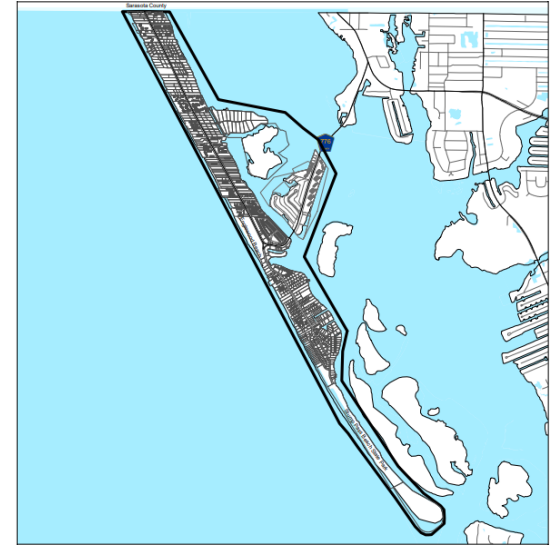
Beach Renourishment Assessment History

- In 2017, Peter A. Ravella Consulting, LLC (PARC) developed a beach renourishment assessment methodology and financing plan for the implementation of Charlotte County's Comprehensive Shoreline Management Program (CSMP).
- Since the initial 8-year assessment cycle, coastal regions of Charlotte County have continued to experience beach erosion and significant storm damage, necessitating the continuation of the assessment on Manasota Key and Don Pedro for another cycle.

**Don Pedro-Knight Island Beach
Renourishment MSBU**



**Manasota Key Beach
Renourishment MSBU**





Assessment Methodology

- The beach renourishment assessment features two separate components: one for regular maintenance of the shoreline, and one for larger capital projects including, but not limited to, rock revetments and the installation of shoreline armoring structures. The total cost, assuming no state or federal funds is \$43.7M (\$6.7M annual debt service).
- In Manasota Key, this includes 2,025 unique parcels, while in Don Pedro-Knight Island, this includes 1,190 unique parcels. The below table provides an overview of parcels subject to the MSBU assessments by property type:

Parcel Type:	Manasota Key	Don Pedro-Knight Island
Residential	1,996	1,174
Commercial	23	6
Government	6	10
Total	2,025	1,190

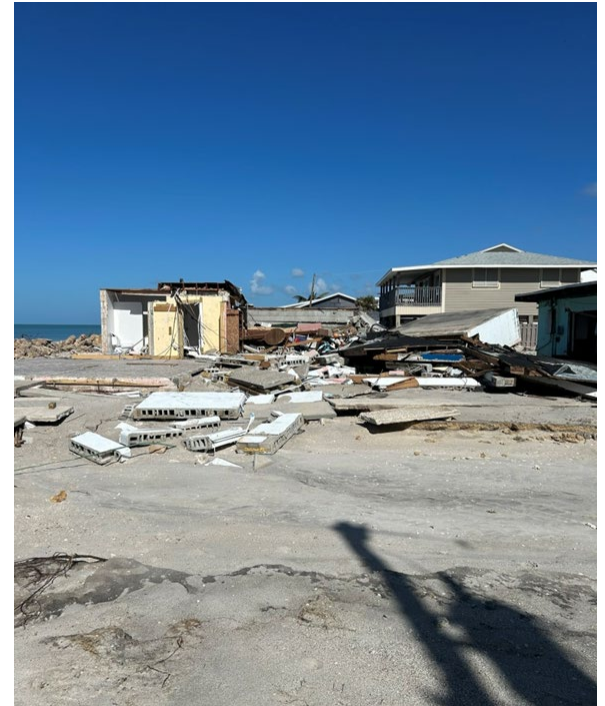
- Project costs are subject to the eight-year assessment cycle and financing interval. Project costs summarized below assume no state and federal dollars will be received.

Manasota Key	Total	Annual
Capital	\$23,524,613	\$3,625,072
Maintenance	\$3,021,095	\$377,637
Total	\$26,545,708	\$4,002,708
Don Pedro-Knight Island	Total	Annual
Capital	\$23,505,495	\$3,622,125
Maintenance	\$2,196,751	\$274,594
Total	\$25,702,246	\$3,896,719



REC and Nearshore Benefit Zone (NBZ) Assessments

- The ongoing investments in beach renourishment provide a direct and special benefit to all properties within the MSBU by protecting the natural beach environment, enhancing storm-damage protection for properties and supporting infrastructure, and improving and sustaining the market and rental value of properties.
- The MSBU also expands the recreational opportunities for property owners, tenants, customers, and visitors by increasing the beach and ensuring its accessibility, a major factor driving residency, rentals, and commercial activity within the MSBU. This component of the assessment, which applies to all eligible parcels within the MSBU, is known as the REC assessment, and comprises of the majority (80 percent) of project costs.
- In addition to benefits to all properties, investments in beach renourishment provide an even greater level of benefit to properties located closer to the shoreline, within the Nearshore Benefit Zone (NBZ), including reduced shoreline-retreat risk, reduced land-loss risk, and more convenient access to the beach. Approximately 20 percent of project costs are allocated to the NBZ, a fair and reasonable allocation, as benefits to this area are comparatively limited in scope.



Coastal damage in Manasota Key following Hurricane Milton
Source: NBC News



Assessment Apportionment

- Residential REC assessments are apportioned by the number of equivalent dwelling units (EDUs), while commercial and government REC assessments are based on the parcel's just value as a percentage of total MSBU commercial or government just value, respectively.
 - An assessment floor is applied for both commercial and government parcels such that no parcel is assessed for less than that of one EDU for the applicable geography.
- NBZ assessments are apportioned based on an NBZ factor – a composite score of one point for every ten feet of beachfront length and one point for every one-tenth of parcel acreage. Assessments are assigned according to each subject parcel's percentage of total NBZ factor points.
 - The below table provides an overview of the 28 new NBZ parcels in Manasota Key and three new NBZ parcels in Don Pedro-Knight Island. These parcels were added to the assessment roll primarily as a result of the subdivision of what was previously one parcel into several separate parcels. The majority of these parcels represent condominium units that share an existing property address but were individually parceled out.

Manasota Key			Don Pedro
411912525002	411912532005	411912532012	412033151025
411912525004	411912532001	411912483005	412033151024
411912532010	411912532007	411912403006	412031476025
411912525006	411912532004	411912532000	
411912525003	411912525001	411912525000	
411912525005	411912532008	411912532002	
411912532009	411912525008	411901702145	
411912532011	411912532006	411912403006	
411912532003	411913231032		
411912525007	411912532013		

Rate Comparison

Don Pedro/Knight Island Beach Renourishment

Property Type	Basis	Cycle 1		Cycle 2		
		Units	Annual Rate	Units	Proposed Annual Rate	Max Rate
Commercial Recreation	VALU	873.023	\$ 0.757	1,367.044	\$ 3.69	\$ 5.11
<i>Capital</i>			\$ 0.698*		\$ 3.32	\$ 4.74
<i>Maintenance</i>			\$ 0.059		\$ 0.37	\$ 0.37
Government Recreation	VALU	3,092.999	\$ 0.758	2,856.585	\$ 3.69	\$ 5.11
<i>Capital</i>			\$ 0.699*		\$ 3.32	\$ 4.74
<i>Maintenance</i>			\$ 0.059		\$ 0.37	\$ 0.37
Nearshore Benefit Zone	PT	2,916.036	\$ 25.280	3,391.830	\$ 183.14	\$ 254.44
<i>Capital</i>			\$ 23.300*		\$ 166.95	\$ 238.25
<i>Maintenance</i>			\$ 1.980		\$ 16.19	\$ 16.19
Residential Recreation	EDU	1,221.000	\$ 239.540	1,143.000	\$ 1,903.69	\$ 2,635.26
<i>Capital</i>			\$ 220.770*		\$ 1,712.87	\$ 2,444.44
<i>Maintenance</i>			\$ 18.770		\$ 190.82	\$ 190.82

*Cycle 1: Capital rate portion was reduced to \$0 in year 8.

Cycle 2: Proposed Annual Rate includes Federal funding at \$1,640,202, State funding at \$799,875, and County subsidy at \$4,160,000.

Max Rate is showing the full rate without Federal, State or County contributions.

There is an additional \$6,744,521 in Federal and \$7,011,120 in State funding that has not yet been awarded.

Proposed Annual Rate will be reduced upon award of additional State and Federal funding.



CHARLOTTE COUNTY
FLORIDA

Waterway MSBU - Bocilla Lagoon

Bocilla Lagoon

- Bocilla Lagoon Dredge
 - Channel in Bocilla Lagoon was filled in with overwash sand during Hurricanes Helene and Milton
 - Project will remove the overwash sand from the channel restoring navigation
 - Status - design/permitting

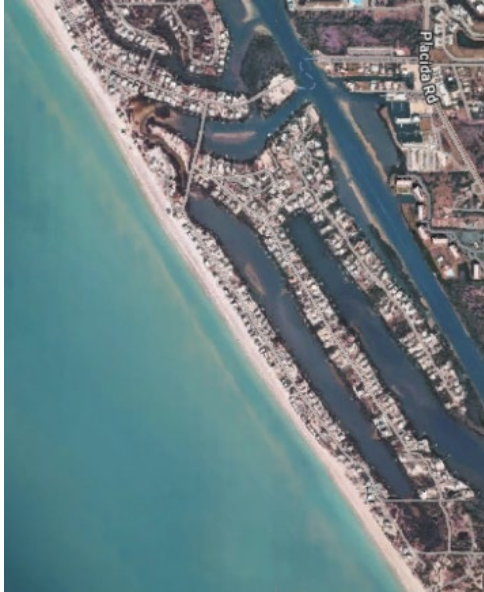
Bocilla Lagoon

- Bocilla Lagoon Boundary and Dredge
- Bocilla Lagoon Rate Methodology



Bocilla Lagoon MSBU Assessment

What is the Bocilla Lagoon MSBU?

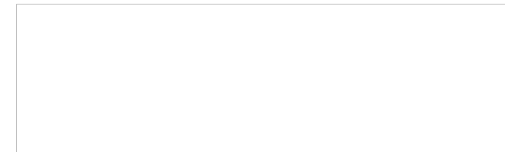


- ◆ Bocilla Lagoon is a public waterway within the extents of Palm Island that has limited navigability due to overwashed sand from Hurricanes Helene and Milton that filled the lagoon and its surrounding mangroves, creating inadequate water depths for local mariners.
 - This has occurred at least one other time in the past, however in that past instance the County received full funding to remove the overwashed sand; therefore, an MSBU was never created.
 - At this time, the County has determined that funding to remove the overwashed sand from Hurricanes Helene and Milton is not available and will be funded via special assessment.
- ◆ The County plans to implement its dredging capital improvement program (“CIP Project”) allowing for the continued use and enjoyment of the properties within the Bocilla Lagoon via the existing waterway / lagoon.
- ◆ The County plans to fund its CIP Project through debt financing. This debt is expected to be repaid from the proceeds of non-ad valorem special assessments levied on properties within the Bocilla Lagoon MSBU.



Project MSBU Methodology

- The County's debt will be secured by special assessments allocated to properties within the Bocilla Lagoon MSBU based on the proportional benefits that each property receives from the Project.
- Florida Law generally allows the County some latitude in determining the appropriate methodology to allocate the costs of its Project to benefiting properties in the MSBU. The two principles are:
 - (1) the properties being assessed must receive a special benefit from the Project and,
 - (2) the assessments allocated to each property must be fairly and reasonably apportioned among the benefiting properties.
- Given the majority residential property make-up with the MSBU and the special benefit that will inure to those properties from the Project, the recommended method of apportionment is via a Water Access Unit ("WAU") as defined and described herein:
 - "Water Access Unit" means a dock, landing, ramp, slip, bay, wharf, lift or other structure or point of direct access for receiving boats and other watercraft, which will serve as the standard assessment unit, to be used in calculating the assessments as a proxy to the expected special benefit derived from the CIP Project, as determined for each parcel.





Bocilla Lagoon MSBU Location & Parcels



Source: Charlotte County and PFM Group Consulting LLC

MSBU Parcels

Land Use Code (& parcel ID)	Land Use Code Description (Parcel ID Owner)	Parcels	Assessable Property	Units	WAU Factor (1)	WAUs
0	Vacant Residential	29	Y	29	1	29
1	Vacant Multi-family Residential	6	Y	6	1	6
2	Vacant Residential (land with a land improvement)	9	Y	9	1	9
4	Land Condominium	4	Y	4	1	4
7	Vacant Multi-Family Residential(land with a land improvement)	1	Y	1	1	1
100	Single Family	63	Y	63	1	63
101	Single Family/Determined Unlivable	7	Y	7	1	7
102	Single Family/Cluster Home	8	Y	8	1	8
108	Single Family Residence with Guest/Separate Living Unit	1	Y	1	1	1
403	Zero Lot Lines	1	Y	1	1	1
420	Single Residential on Land Condominium	6	Y	6	1	6
800	Duplex 2 units	1	Y	2	0.5	1
812	Multi-single family units ((2) single family residences, single family residence and mobile home or (2) mobile homes)	1	Y	2	0.5	1
902	Improved Residential Subdivision Common Element	3		see note (2)		
8087	Vacant State other than military, forests, parks, recreational areas, hospitals, colleges	2	Y	2	2	2
9100	Utility, gas and electricity, telephone and telegraph, locally assessed railroads, water and sewer service, pipelines, etc	1	Y	1	1	1
9400	Right-of-way streets, roads, irrigation channel, ditch, etc.	1	Y	1	1	1
9502	Natural bodies of water	1	Y	1	1	1
TOTAL		145		164		146

WAU Factor = Points of water access (e.g. allowable number of docks, landing access, etc...) divided by the number of parcels or residential units granted access via the point(s) of water access;

Parcel ID 412032601000 does not receive an assessment, rather its assessment is shared among the 9 residential units which receive a benefit to the associated 3 WAUs, similarly parcel ID 412033801000 does not receive an assessment, rather its assessment is shared among the 11 residential units which receive a benefit to the associated 1 WAU. Parcel ID 412033726000, is not assessed as the parcel provides an easement to the lagoon (technically waterfront) but does not provide a specific point of lagoon access via a landing, dock, or equivalent and as a result has an assignment of zero WAUs

Bocilla Lagoon Rate Summary

Waterway Unit				
	Basis	Units	Proposed Annual Rate	Max Rate
Bocilla Lagoon	WAU	142	\$ 1,122.41	\$ 1,400.61
	<i>Capital</i>		\$ 1,056.03	\$ 1,317.78
	<i>Maintenance</i>		\$ 66.38	\$ 82.83
Bocilla Lagoon				
Common area (Beach Place)	WAU	9	\$ 374.14	\$ 466.87
	<i>Capital</i>		\$ 352.01	\$ 439.26
	<i>Maintenance</i>		\$ 22.13	\$ 27.61
Bocilla Lagoon				
Common area (Bocilla Beach to Bay)	WAU	11	\$ 102.03	\$ 127.33
	<i>Capital</i>		\$ 96.00	\$ 119.80
	<i>Maintenance</i>		\$ 6.03	\$ 7.53

Due to the limited number of parcels subject to assessment, the maximum rate includes a contingency for potential changes before final placement on the assessment roll.



Timeline of Key Events

- **March 17** Board Workshop Discussion
- **April 6 – 7** Community Outreach
- **May 19** Board Workshop for MSBU Rates
- **July 22 or 23** Initial Assessment Resolution Public Hearings
- **August** TRIM notices mailed
- **September 8** Final Assessment Resolution Public Hearings
- **September 8** First Budget Public Hearing (Rate Resolution for all MSBUs)
- **September 15** Certify assessment roll
- **November 1** Tax bills mailed