



Bill No. 5021

Ordinance No. _____

INTRODUCED BY

ALDERMEN UTT, FINLEY, GRAY, HAUG, FLEMING, WEAVER, SIEGEL, LEHMKUHL

AN ORDINANCE PROVIDING FOR THE ANNEXATION BY THE CITY OF BALLWIN, MISSOURI OF AN AREA OF UNINCORPORATED LAND DESCRIBED HEREIN AND REFERRED TO AS “ARBOR TRAILS SUBDIVISION AND OAKBROOK ELEMENTARY SCHOOL”, AND PROVIDING FOR APPROVAL OF AN ANNEXATION PLAN AND A SIMPLIFIED BOUNDARY CHANGE PROPOSAL TO BE SUBMITTED TO THE ST. LOUIS COUNTY BOUNDARY COMMISSION FOR ITS CONSIDERATION.

WHEREAS, the City has received verified petitions signed by at least seventy-five percent (75%) of the registered voters within an area of land located in unincorporated St. Louis County referred to as “Arbor Trails Subdivision and Oakbrook Elementary School” in the City of Ballwin’s Annexation Map Plan submitted to the St. Louis County Boundary Commission, hereinafter referred to as “Arbor Trails Subdivision and Oakbrook Elementary School”; and

WHEREAS, the area proposed to be transferred, referred to as “Arbor Trails Subdivision and Oakbrook Elementary School”, is predominantly residential in character and has an average residential density of not less than one dwelling unit per three (3) acres; and

WHEREAS, the Annexation Area proposed to be annexed constitutes an “unincorporated area” as that term is defined in Section 72.407.1(2) of the Revised Statutes of Missouri; and

WHEREAS, the City of Ballwin proposes to annex the property referred to as “Arbor Trails Subdivision and Oakbrook Elementary School” into the City as a simplified boundary change pursuant to 72.405.6 of the Revised Statutes of the State of Missouri; and

WHEREAS, the City has developed a Plan of Intent to be submitted to the St. Louis County Boundary Commission for approval of the simplified boundary change of the area referred to as “Arbor Trails Subdivision and Oakbrook Elementary School” by the City setting forth, among other things, the various impacts of the boundary change proposal, a legal description of the Annexation Area, proposed time schedule for the provision of the services to the Annexation Area, the current tax rates, the revenue sources, the effect of the simplified boundary change on St. Louis County resource distribution, the proposed zoning, and the effective date of the proposed Annexation.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF BALLWIN, ST. LOUIS COUNTY, MISSOURI, AS FOLLOWS:

Section 1. The City will seek the inclusion of the Arbor Trails Subdivision and Oakbrook Elementary School within the City’s limits through a simplified boundary change proposal as being in the best interest of the City of Ballwin, the unincorporated area subject to the simplified boundary change proposal and the area adjacent to the unincorporated area subject to the proposed simplified boundary change.



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Section 2. The City has caused to be prepared a Plan of Intent for submission to the St. Louis County Boundary Commission, wherein the City has described and analyzed:

- a) The verified petitions signed by the property owners;
- b) The various impacts of the boundary change proposed;
- c) The ability to accommodate the orderly incorporation in the city;
- d) Legal description of the Arbor Trails Subdivision and Oakbrook Elementary School;
- e) Present level of major services provided by the City and St. Louis County and proposed to be provided to the Arbor Trails Subdivision and Oakbrook Elementary School;
- f) Proposed time schedule for the provision of services to Arbor Trails Subdivision and Oakbrook Elementary School;
- g) Current tax rates;
- h) Revenue sources;
- i) Effect of boundary change on St. Louis County resource distribution;
- j) Proposed zoning;
- k) Compactness of the Annexation Arbor Trails Subdivision and Oakbrook Elementary School; and
- l) Effective date of the proposed transfer.

Section 3. The City is well prepared to effectuate the simplified boundary change of the Arbor Trails Subdivision and Oakbrook Elementary School as described in the Plan of Intent, which the City hereby adopts. The Plan of Intent, a certified copy of this Ordinance and all other information deemed necessary to the St. Louis County Boundary Commission, shall be submitted to the St. Louis County Boundary Commission for its consideration and approval.

Section 4. This Ordinance shall take effect and be in full force from and after its passage and approval.

PASSED this ____ day of _____, 2025.

MARK R. STALLMANN, MAYOR

APPROVED this ____ day of _____, 2025.

MARK R. STALLMANN, MAYOR

ATTEST: _____
ERIC STERMAN, CITY ADMINISTRATOR

**Plan of Intent to be submitted to St.
Louis County Boundary Commission
for the Annexation of Arbor Trails
Subdivision and Oak Brook
Elementary School**



Section 2: Plan of Intent

i: Geographic

1. General description:

The Arbor Trails Annexation Area proposed with this submittal for annexation into the City of Ballwin lies adjacent to Ward 1, on the south side of Big Bend Road, approximately 1500 feet (0.28 mile) east of Ries Road. The area includes the 85 houses in Arbor Trails Subdivision along with Oakbrook Elementary School. The area is generally bounded by Unincorporated St. Louis County to the north, south and east and the City of Ballwin to the west.

2. Map of proposed annexation area: Appendix A

3. Map of proposed annexation area, including surrounding municipalities: Appendix B

4. Demographic and Geographic information from 2020 Census:

	Population (2020)	Land area (acres)	Dwelling Units (2022)
Arbor Trails Subdivision	249*	49	85
City of Ballwin	31,103 residents	5775.87	12,625

*Population is estimated based off of the 2020 Census average family size in St Louis County.
Average family size of 2.92 people x 85 dwelling units = 248.20 people

5. The residents of Arbor Trails Subdivision have significant ties with the City of Ballwin. They are within the boundaries of Parkway School District, more specifically Oakbrook Elementary School, within Unincorporated St Louis County and adjacent to Ballwin's boundaries. The Subdivision is approximately 2.5 miles from the City of Ballwin's Recreational Facility known as "The Pointe".
6. Arbor Trails is the only subdivision involved in this petition and will not be split as a result of the annexation.
7. Compactness of the area to be annexed by identifying:
- There is a single street connection between the area to be annexed and the City of Ballwin. Shadowoak Drive intersects with Big Bend Road, which is considered a collector road.
 - The annexation area is easily accessible and would not have a major impact on delivery of City Services.
 - There are no natural or man-made barriers that would impede the efficient delivery of City Services to the annexation area.

8. Acreage of the proposed annexation area vs total combined area affected by the annexation:
The proposed annexation area is approximately 0.84% the acreage of Ballwin's current total acreage:
$$\frac{49 \text{ acres of proposed annexation area}}{5775.87 \text{ total acres in the City}} = 0.84\% \text{ of Ballwin's current total acreage}$$
9. Extent of boundary adjacency:
The proposed annexation area has a perimeter of approximately 7,613 linear feet with a common boundary of approximately 1,544 linear feet, resulting in 20.28% of shared boundary.
$$\frac{1,544 \text{ feet of shared boundary}}{7,613 \text{ feet of annexation area perimeter}} = 20.28\% \text{ of shared boundary}$$
10. Isolating any parcels in Unincorporated St Louis County:
This annexation will not result in any contiguous Unincorporated area being accessible only through another municipality and/or another county.
11. Municipal growth plans:
Pursuant to the 2024 Map Plan submitted to and approved by the St Louis County Boundary Commission at the beginning of this cycle, the proposed annexation area is within a large unincorporated area, to be considered for annexation.
12. The proposed simplified boundary change creates logical and reasonable municipal boundaries in the County as the annexation area directly borders the City along 20.28% of its perimeter.

ii: Financial

1. Table 1 tax rate changes:

Tax type	St Louis County	Ballwin
Real estate	6.4364%	6.4364%
Sales	7.738%	8.738%
Personal property	7.9619%	7.9619%
Utility tax	5.00%	7.00%

- a. Real estate tax: There will be no change to current real estate taxes.
- b. Sales tax: Residents will see a 1% increase in the tax on the purchase of vehicles.
- c. Personal property tax: There will be no change to current personal property taxes. Ballwin does not tax personal property.
- d. Utility tax: Residents will see a 2% increase in utility tax.

2. Table of projected revenues and expenditures:

Year	Revenues	Expenditures*
2026	\$68,679	\$66,005
2027	\$68,816	\$67,985
2028	\$68,954	\$70,024

*Expenditures do not include any large capital expenditures that may be deemed necessary.

3. Table of revenues, expenditures and fund balance history:

Year	Revenues	Expenditures*	Fund balance
2023	\$24,730,091	\$22,110,489	\$22,446,878
2024	\$25,705,190	\$23,821,699	\$24,692,497
2025	\$25,058,153	\$24,906,096	\$20,486,865

4. Table projecting combined revenue and expenditures:

Year	Revenues	Expenditures*
2026	\$25,550,383	\$25,451,347
2027	\$25,646,280	\$26,093,040
2028	\$25,749,015	\$26,778,078

5. Table of anticipated capital improvement projects:

Year	Revenues	Expenditures*
2026	\$0	\$0
2027	\$0	\$0
2028	\$0	\$0

The street infrastructure of the annexation area has been reviewed by the City of Ballwin's Public Works Department. The City of Ballwin recognizes that annexation area carries the responsibility of maintaining all public streets and sidewalks. Currently, there are 367.77 slabs in Arbor Trails, with the average cost for slab replacement estimated at approximately \$1762.56 per slab. The City of Ballwin does not believe that a Capital Improvement Plan is necessary for this annexation; unless an emergency situation arises, the annexation area would begin to see street maintenance beginning the fiscal year following the date of annexation with consideration towards budget constraints and with regards to street slab conditions with repairs to be determined as needed.

6. Extraordinary effect of the proposed boundary change:

There will be no extraordinary effect on the distribution of tax resources in St Louis County as a result of annexation.

7. Table of redirected revenue sources:

Tax type	Amount
Public safety tax	\$15,882
Utility tax	\$28,500
Vehicle sales tax	\$7,359
Motor fuel tax	\$9,367
Motor vehicle fees	\$1,071
Road/bridge tax	\$5,875
Permits	\$625

8. Impact fees:

New residential developments are subject to a recreational impact fee, calculated based on the number of dwelling units or lots created. At this time, no impact fee is anticipated, as the annexation area is already developed.

9. Traffic Generation Assessment (TGA):

The City of Ballwin will allow St. Louis County to collect any applicable Traffic Generation Assessment (TGA) fees from the annexation area. Ballwin does not have any policies or ordinances that prohibit participation in the TGA program..

10. Subdivision escrow accounts:

Ballwin does not have policies or ordinances that would impact existing subdivision escrow accounts held by St. Louis County. In prior annexations involving such accounts, Ballwin has coordinated with St. Louis County to facilitate the release of escrow funds and final acceptance of subdivision improvements. This process has historically been smooth, with no reported issues or negative outcomes.

11. Impacts on tax base and revenue generation:

a. Area subject to boundary change:

The proposed annexation is not expected to affect the annexing area's ability to generate revenue. The City of Ballwin does not anticipate any impact on existing organizations, nor is any organization, other than St. Louis County, expected to relinquish taxing authority as a result of the annexation.

b. Existing municipality and its residents:

The proposed annexation will have no effect on the City of Ballwin or its residents with regard to their ability to generate revenue. Ballwin retains the authority to assess taxes in accordance with state law applicable to fourth-class cities, and this authority will remain unchanged.

c. Adjoining areas and residents outside of the annexation area:

The proposed annexation will have no impact on the tax base or revenue generation for residents or areas adjacent to, but outside of, the annexed area.

d. Entire geographic area of the County and its residents:

There will be minimal impact on the tax base or revenue generation for residents or the overall geographic area of St. Louis County. Most revenues received by governmental entities providing municipal services are based on population or the number of dwelling units. While a redistribution of revenues between Ballwin and the County will occur as a result of the jurisdictional change, the overall effect on tax base and revenue generation will be negligible.

iii: Services

1. List of services and providers:

Service	Present provider	Post annexation provider	Fee	In house	Contract
Administration	St Louis County	Ballwin	No	X	
Building department - code enforcement - permits & inspections	--- St Louis County St Louis County	--- Ballwin Ballwin	--- No Yes	--- X X	
Fire protection	Metro West	Metro West	Some	n/a	n/a
Legislation	St Louis County	Ballwin	No	X	
Library	St Louis County	St Louis County	n/a	n/a	n/a
Local court	St Louis County	Ballwin	No	X	
Parks & Rec	St Louis County	Ballwin	Some	X	
Planning & Zoning	St Louis County	Ballwin	Some	X	
Police	St Louis County	Ballwin	No	X	
Public works -Leaf pick up -Sidewalk installation* -Sidewalk maintenance* -Street light bills -Street light installation -Street maintenance* -Snowplowing	--- Private St Louis County St Louis County Subdivision Subdivision St Louis County St Louis County	--- Ballwin Ballwin Ballwin Ballwin Ballwin Ballwin Ballwin	--- No No No No No No No	--- X X X X X X X	n/a
Public school	Parkway	Parkway	No	n/a	n/a
Social services	St Louis County/ State of Missouri	St Louis County/ State of Missouri	n/a	n/a	n/a
Solid Waste** - Recycling - Trash - Yard waste	--- Private Private Private	--- Ballwin Ballwin Ballwin	--- Yes Yes Yes		--- X X X
Utilities - Electric - Sewer - Water	--- Ameren MSD Missouri American Water	--- Ameren MSD Missouri American Water	--- n/a n/a n/a	n/a	n/a

*Except in emergency situations, major street and sidewalk maintenance and upgrades in annexed areas will not begin sooner than the beginning of the fiscal year following the effective date of the annexation and will be performed in accordance with Ballwin's existing procedure. Based on budget constraints and regular citywide surveys of roadway conditions, an annual listing of the roadways most in need of work is prepared for each Ward for the annual work program. All efforts are made to monitor and correct deterioration as soon as it is discovered.

**Use of Ballwin's contracted solid waste removal provider cannot be required for two years following the effective date of the annexation; however, the service and its associated rate will be available on a voluntary basis prior to that period.

2. Barriers to efficient delivery of services:

There are no barriers that will impede the efficient delivery of services to the proposed annexation area.

3. Effective date of Municipal Services:

The City of Ballwin will begin providing municipal services to the annexation area effective on the date of annexation. Exceptions include solid waste removal, which will be required no later than two (2) years from the annexation date; street maintenance, which will be conducted according to Ballwin's standard procedures; and seasonal services, which will be performed on an as-needed basis.

iv: Zoning/Land Use

1. Percentage of land use:

Land use	Acres	Percentage
Commercial	0.00	0.00%
Industrial	0.00	0.00%
Institutional / Government	20.9	42.74%
Single Family Residential	21.27	43.50%
Multi Family Residential	0.00	0.00%
Vacant (common ground)	6.73	13.76%
Total	48.90	100.00%

2. Current and proposed zoning maps: Appendix C

3. Zoning and land use changes after annexation:

The annexation area includes an existing elementary school and a single-family residential subdivision. The current land uses within the annexation area are expected to remain unchanged.

The school property, which totals approximately 20.9 acres, is currently split between two zoning designations: NU Non-Urban and R-4 Residence District. Arbor Trails Subdivision is currently zoned R-3 Residence District. Upon annexation, the City proposes to rezone the entire area to the City's R-3 Single Family Dwelling District, which closely aligns with St. Louis County's R-3 Zoning District.

4. Non-conformities:

No obvious non-conformities would be created as a result of the change in zoning to the annexation area. Any unintentional creation of non-conformities would result in correction in the event the structure(s) would be replaced.

5. Regulations affecting the annexation area:

Regulations contained in the City's Code of Ordinances would apply to the annexation area. No other districts or overlay regulations would apply.

6. Affect on prospective development:

The annexation area is a largely developed subdivision and elementary school, with a low likelihood for any further development in the near future. However, any development that may occur would be directly affected by the annexation. Development approvals will be subject to Ballwin's procedures and not those of St. Louis County.

7. Code compliance with on-going development projects:

There are currently no active developments in the annexation area. However, any permits that remain open as of this date are generally completed by St. Louis County. Ballwin would then be asked to participate in final inspections in coordination with the County. Additionally, any open code enforcement cases would be transferred to Ballwin for review and follow-up by the City's Code Enforcement Inspectors.

8. Future development:

Ballwin does not anticipate any significant development in the annexation area in the foreseeable future. The area is largely built out, and future development on the few remaining vacant parcels is considered unlikely. It should also be noted that any future development occurring under the proposed Ballwin R-3 zoning would be required to comply fully with all applicable regulations.

v. Summary

The City of Ballwin does not actively pursue annexations; rather, its policy is to carefully evaluate petitions submitted for voluntary annexation or simplified boundary changes. In reviewing such petitions, the City considers whether the proposed annexation would impact its ability to maintain a high level of service both to the annexation area and to the community as a whole.