

# Charlotte County Transportation Impact Fee Update Study



Building Industry  
Oversight Committee

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**TINDALE**  
**OLIVER** and Associates, Inc.



## Presentation Overview

- 1 Background**
- 2 Key Concepts**
- 3 Findings of Technical Study**
- 4 Next Steps**



## Background

- **Transportation Impact Fee**
  - Updated in 2009
  - Indexed annually since 2009
  - Wide variation in rates by zone (Urban, Rural 1, Rural 2)
- **Transportation Impact Fee Update**
  - Update input variables
  - Transition to a single county-wide fee rate
  - Provide scenario without sales tax contribution



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## Key Concepts

### ● **Transportation Impact Fee Variables:**

- **Demand Component**
  - Trip Generation Rate, Trip Length, % New Trips
- **Cost Component**
  - County & State Roads, Roadway Capacity
- **Credit Component**
  - Other County & State capacity expenditures, fuel tax

$$\underline{\text{Demand} \times \text{Cost} - \text{Credit} = \text{Impact Fee}}$$



## Key Concepts

### ● **Demand Component**

- **Sources**
  - National ITE Reference (9<sup>th</sup> Edition)
  - Florida Studies Data (including local Charlotte studies)
- **Demand Calculation**
  - Trip Gen. Rate x Trip Length x % New Trips



## Key Concepts

### ○ Demand per Unit of Development

- **Trip Gen. Rate** = Number per day
- **Trip Length** = Travel A to B
- **% New Trips** = Accounts for trips already on the roadway
- **Interstate/Toll Discount** = Accounts for interstate toll trips (not charged)



## Key Concepts

### ○ Single Family Residential example

- **Trip Gen. Rate** = 7.81
- **Trip Length** = 6.62
- **% New Trips** = 100%
- **Interstate/Toll Discount** = 15.6%

$$(7.81 * 6.62 * 100\% / 2) * (1-15.6\%) = \underline{21.82}$$



# Key Concepts

## ● Cost Component

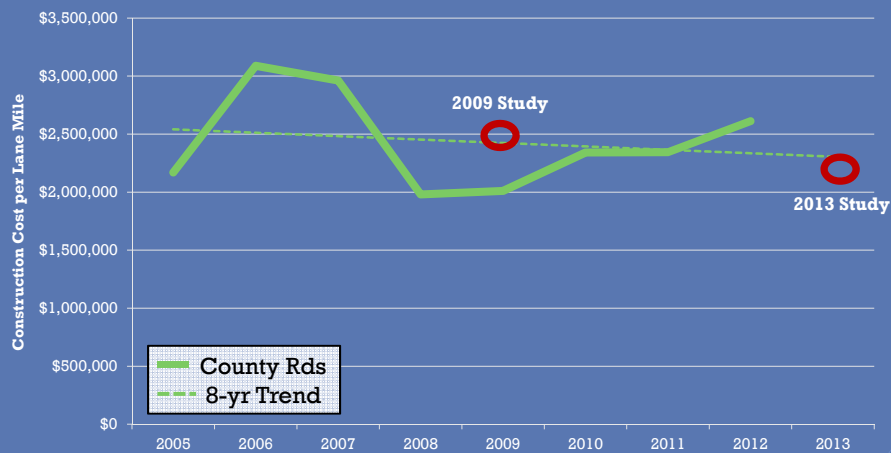
### • Sources

- Local roadway improvements
- Recent new construction/lane addition projects throughout Florida
- FDOT Long Range Estimates (LRE)



# Key Concepts

## ● County Roadway Construction Cost Trend

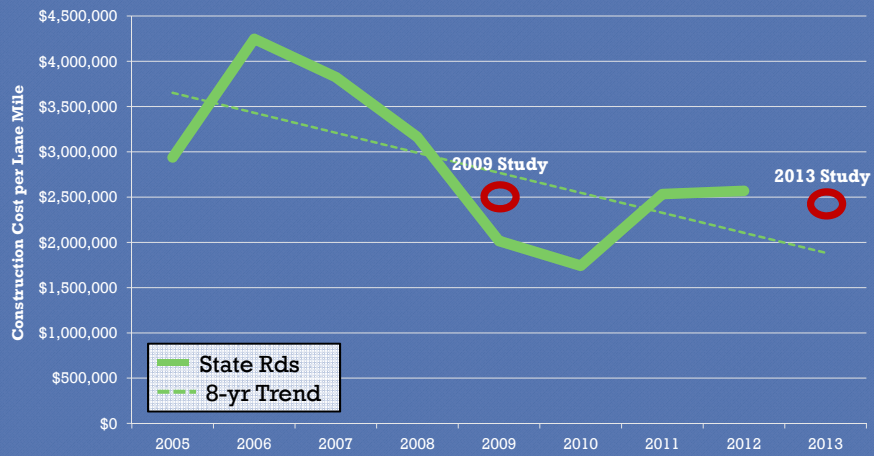






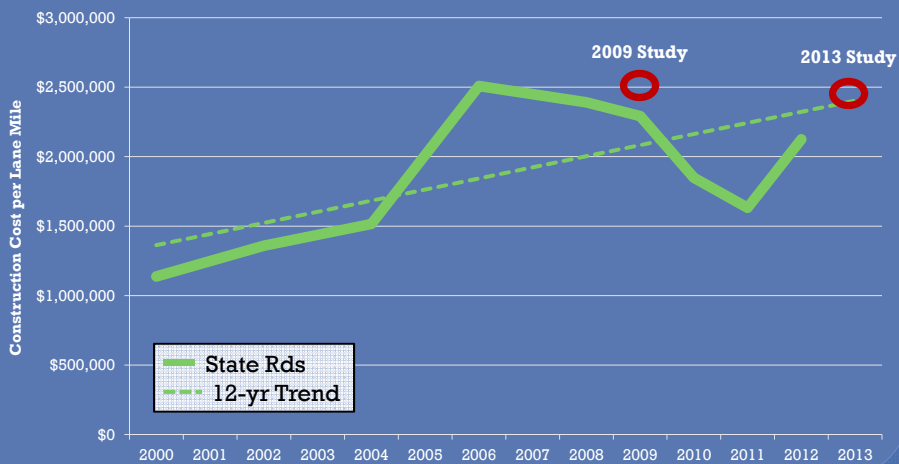
# Key Concepts

## State Roadway Construction Cost Trend



# Key Concepts

## Statewide FDOT LRE





# Key Concepts

## ● Cost Component

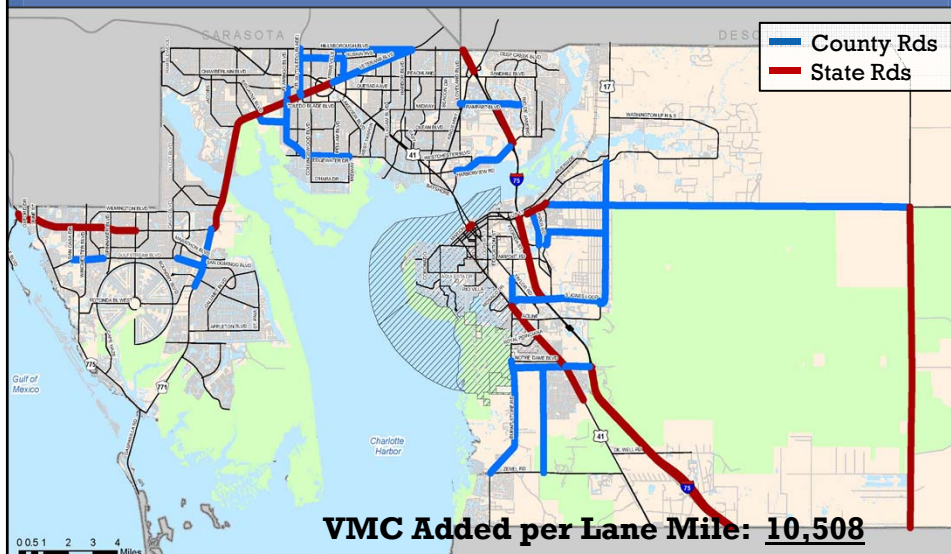
Cost Phase	County Roads*	State Roads	Weighted Average
Design	\$220,000	\$240,000	\$225,800
Right-of-Way	\$1,034,000	\$1,128,000	\$1,061,260
Construction	\$2,200,000	\$2,400,000	\$2,258,000
CEI	<u>\$220,000</u>	<u>\$240,000</u>	<u>\$225,800</u>
<b>Total Cost</b>	<b>\$3,674,000</b>	<b>\$4,008,000</b>	<b>\$3,770,860</b>

\*Based on 3 local improvements and 46 improvements from other counties in Florida  
 - Toledo Blade Corridor from North Port to US 41 (2008)  
 - Piper Rd from Henry St to Jones Loop Rd (2010)  
 - Burnt Store Rd, Ph. I from US 41 to Notre Dame Blvd (2011)



# Key Concepts

## L RTP Improvements





## Key Concepts

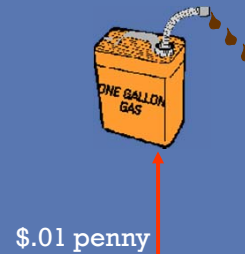
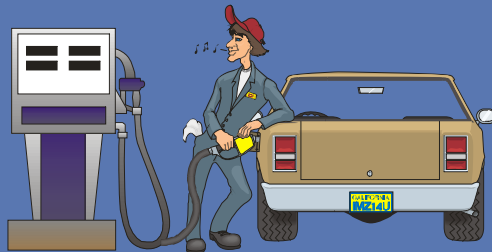
### ● Cost Component

- **Weighted Avg Cost per VMC**
  - Cost per Lane Mile: \$3,770,860
  - Avg VMC Added per Lane Mile: 10,508
  - Cost per VMC:  $\$3.77\text{M} / 10,508 = \underline{\$358.86}$



## Key Concepts

### ● Credit Component



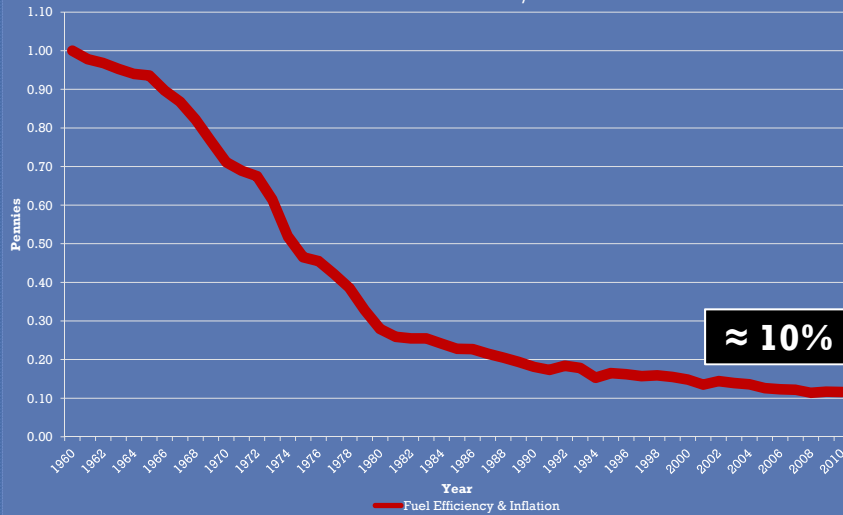
1 CENT  
GAS TAX  
PER GALLON





## Key Concepts

Decrease in Value of 1¢ of Fuel Tax



## Key Concepts

### ● Credit Component

- **Sales tax set to expire in 2014**
  - Re-adoption is not guaranteed
  - Even if re-adopted, portion to transportation likely to decrease
- **Scenario 1** – No future sales tax for transportation
- **Scenario 2** – Sales tax included at  $\frac{1}{2}$  of 2008-2014 allocation



## Key Concepts

### ● Credit Component

- All revenue sources converted to equivalent gas tax pennies for credit calculation

Credit	Scenario 1 (w/o Sales Tax)	Scenario 2 (w/Sales Tax)
County Revenues	\$0.107	\$0.158
County Debt Service	\$0.010	\$0.010
State Revenues	<u>\$0.061</u>	<u>\$0.061</u>
<b>Total Credit</b>	<b>\$0.178</b>	<b>\$0.229</b>



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## Findings of Technical Study

- **Single Family Residential Land Use**
- **Scenario 1 (w/o sales tax):**
  - **Demand = 21.82**
  - **Cost Component = \$358.86**
  - **Credit Component = \$1,547**
  - **Net Impact Fee = \$6,283**



## Findings of Technical Study

### ● Charlotte County – Rate Comparison:

Land Use	Scenario 1 (wo/Sales Tax)*	Scenario 2 (w/Sales Tax)*	Urban	Rural 1	Rural 2
Study Date	2013	2013	2009	2009	2009
Single Family	\$6,283	\$5,830	\$1,845	\$9,509	\$8,779
Light Industrial	\$3,986	\$3,704	\$1,190	\$7,033	\$6,489
Office (<100k)	\$7,515	\$6,968	\$619	\$3,736	\$3,448
Retail (125k)	\$10,084	\$9,256	\$2,303	\$13,953	\$12,896
Fast Food w/DT**	\$70,920	\$64,890	\$3,789	\$22,930	\$21,183

\*These are county-wide transportation impact fee rates

\*\*DT = drive-thru

Single family is measured per dwelling unit; all other uses are per 1,000 sf



## Findings of Technical Study

### Charlotte County – Rate Comparison (**Calculated Rate**):

Land Use	Scenario 1 (wo/Sales Tax)	Scenario 2 (w/Sales Tax)	Lee	Collier	Sarasota	Polk
Study Date	2013	2013	2011	2010	2007	2008
Adoption %	n/a	n/a	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Single Family	\$6,283	\$5,830	\$6,770	\$6,133	\$5,774	\$4,985
Light Industrial	\$3,986	\$3,704	\$4,670	\$4,619	\$2,832	\$675
Office (<100k)	\$7,515	\$6,968	\$5,410	\$9,905	\$6,008	\$5,310
Retail (125k)	\$10,084	\$9,256	\$8,010	\$10,924	\$11,319	\$6,754
Fast Food w/DT*	\$70,920	\$64,890	\$32,350	\$79,737	\$27,243	\$65,096

\*DT = drive-thru  
Single family is measured per dwelling unit; all other uses are per 1,000 sf



## Findings of Technical Study

### Charlotte County – Rate Comparison (**Adopted Rate**):

Land Use	Scenario 1 (wo/Sales Tax)	Scenario 2 (w/Sales Tax)	Lee	Collier	Sarasota	Polk
Study Date	2013	2013	2011	2010	2007	2008
Adoption %	n/a	n/a	<b>20%</b>	<b>94%</b>	<b>50%</b>	<b>0%</b>
Single Family	\$6,283	\$5,830	\$1,354	\$5,753	\$2,887	\$0
Light Industrial	\$3,986	\$3,704	\$934	\$4,333	\$1,416	\$0
Office (<100k)	\$7,515	\$6,968	\$1,082	\$9,291	\$3,004	\$0
Retail (125k)	\$10,084	\$9,256	\$1,602	\$10,247	\$5,659	\$0
Fast Food w/DT*	\$70,920	\$64,890	\$6,470	\$74,793	\$13,621	\$0

\*DT = drive-thru  
Single family is measured per dwelling unit; all other uses are per 1,000 sf



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## Next Steps

- ◉ **BIOC Input**
- ◉ **Workshop with BOCC**
- ◉ **Final Report**
- ◉ **Adoption Hearing**





○ Questions?

**Thank You!**

