

From: Jubb, Claire
Sent: Thursday, May 22, 2014 3:54 PM
To: Burger, Gordon; Flores, Hector; Davis, Roger
Cc: Harris, Ty
Subject: Impact Fee information

All,

I have the below estimate of revenue lost based on FY11,12 and 13. This is just an estimate and only looks at single and multi-family residential and assumes they are in the urban area.

To determine the loss on commercial I need to look individually at each of the commercial permits applied for in the time period which I can do, but its going to take some time. I wanted to get something to you all today and I will continue working on the commercial data tomorrow.

In terms of permitting data, we already have the single family data which Nilgun had just included in her most recent email. I have responses from three jurisdictions with their commercial numbers but no others have responded as yet.

Charlotte County Building Permit Statistics by Fiscal Year

Fiscal Year (Oct - Sep)	FY2011	FY2012	FY2013
Single Family Permits Issued	275	269	394
Impact Fees Assessed (Roads Only)	\$ 474,650.00	\$ 464,294.00	\$ 680,044.00
Impact Fees waived (Public Buildings, Fire EMS, Parks, Library's, Sherriff)	\$ 393,809.00	\$ 385,208.00	\$ 564,608.00
Total that would have been assessed if no waiver in place	\$ 868,459.00	\$ 849,502.00	\$ 1,244,652.00
Multifamily Permits Issued	5	1	2
Impact Fees Assessed (Roads Only)	\$ 6,060.00	\$ 1,212.00	\$ 2,424.00
Impact Fees waived (Public Buildings, Fire EMS, Parks, Library's, Sherriff)	\$ 4,785.00	\$ 957.00	\$ 1,914.00
Total that would have been assessed if no waiver in place	\$ 10,845.00	\$ 2,169.00	\$ 4,338.00

Assumptions: Impact Fee amounts are the average assessed amount based on the 2013 Urban Impact Fee Schedule.

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"To Exceed Expectations in the Delivery of Public Services"

From: Davis, Roger
Sent: Thursday, May 22, 2014 1:53 PM
To: Flores, Hector; Wannall, Caroline
Cc: Jubb, Claire; Burger, Gordon; Sandrock, Raymond; Shoemaker, Kelly
Subject: RE: Impact Fees - 2009 discount on calculated amounts

Hello everyone,
 The attached might make it a little clearer to understand the less than 100% implementation of the 2009 IF Rates at that time. Below is a table that helps me visually with those changes.

Single Family Detached				
Impact Fee	2009 Adopted IF Rates	Urban	Rural 2	Rural 1
Road	100%	\$ 2,188	\$ 10,412	\$ 11,277
Library	78.24%	\$ 169	\$ 169	\$ 169
Public Building	62.05%	\$ 479	\$ 479	\$ 479
Parks & Recreation	36.43%	\$ 851	\$ 851	\$ 851
Fire/EMS	100%	\$ 217	\$ 217	\$ 217
Law Enforcement	100%	\$ 98	\$ 98	\$ 98
		\$ 4,002	\$ 12,226	\$ 13,091

Thanks,
 Roger Davis
 Financial Consultant
 Budget & Administrative Services
 Phone #941-743-1542

X. Board Direction

On April 14, 2009 the Board of County Commissioners directed that 2009 Charlotte County Development Impact Fees not exceed certain levels:

1. **Road Impact Fees.** That the 2009 road impact fees be those as recommended in the March 30, 2009 Technical Report;
2. **Library Impact Fees.** That the 2009 library impact fee not exceed \$169 for a single family detached home. This is 78.24% of the library fee recommended in the March 30, 2009 Technical Report. Library impact fees for all other land uses have been adjusted to 78.24% of that recommended;
3. **Public Facilities Impact Fees.** That the 2009 public facilities impact fee not exceed \$479 for a single family detached home. This is 62.05% of the public facilities impact fee recommended in the March 30, 2009 Technical Report. Parks & Recreation impact fees for all other land uses have been adjusted to 62.05% of that recommended;
4. **Parks & Recreation Impact Fees.** That the 2009 parks and recreation impact fee not exceed \$851 for a single family detached home. This is 36.43% of the parks and recreation impact fee recommended in the March 30, 2009 Technical Report. Parks and recreation impact fees for all other land uses have been adjusted to 36.43% of that recommended;
5. **Fire and EMS Impact Fees.** That the 2009 fire and EMS impact fees be those as recommended in the March 30, 2009 Technical Report; and
6. **Law Enforcement Impact Fees.** That the 2009 law enforcement impact fees be those as recommended in the March 30, 2009 Technical Report.

2009 impact fee schedules for the four tiers plus a schedule for the Englewood Fire Control District follow as Tables BD1 through BD5. These schedules implement the Board directives set out above.

From: Jubb, Claire
Sent: Wednesday, May 21, 2014 4:17 PM
To: Burger, Gordon; Flores, Hector; Davis, Roger
Subject: Impact Fees - 2009 discount on calculated amounts

Hi,

I have done some research into why the full calculated amount was not adopted in 2009.

From what I can find, this item was brought to the BCC initially on 4-14-2009, there was a long public hearing which essentially led to a delay of the decision until the 5-12-2009 meeting but from the minutes, no direction was given.

This was then brought back as a Board Workshop item on 5-12-2009 at which point, the minutes indicate the following (I assume James Fenwick is Jim Fendrick):

James Fenwick explained the purpose of the workshop is to discuss adjustments to impact fee levels based on demographics and needs for roads, libraries, public buildings, parks and recreation, fire and EMS, law enforcement, and affordable housing; gave a slide presentation and recommended moving forward with 2005 impact fees for libraries. Commissioner Cummings noted the fees are based on single-family residential in non-urban areas. Mr. Fenwick agreed. Mr. Fenwick summarized the library impact fee proposals and recommended the 2005 level or \$216; the public buildings impact fee at \$479; parks and recreation impact fee at the Florida average; fire & EMS fee at the moderate price; and law enforcement fee for a reduction to \$98. Commissioner Starr questioned allocation/disbursement of

Following this meeting, the item was brought back on June 9th at public hearing and approved with very little detail in the minutes.

This is all I can find relating to the "why" of the reduction from the full calculated rates.

Thanks

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"To Exceed Expectations in the Delivery of Public Services"



From: Jubb, Claire
Sent: Wednesday, May 21, 2014 4:44 PM
To: 'Nilgun Kamp' (NKamp@tindaleoliver.com)
Cc: Burger, Gordon; Davis, Roger; Flores, Hector
Subject: Impact Fee Waivers and adjustments

Nilgun,

Please find attached a chronology of the annual indexing and when the waiver was introduced/extended etc. If you want to look at the fee schedules themselves, they are located at:

<http://www.charlottecountyfl.com/GrowthManagement/ImpactFees.asp>

- September 8 2009 – Impact fees adopted per the study with amendments – effective September 8 2009
- July 1 2010 – annual indexing of the fees – decrease of 8.84% - effective October 1 2010
- July 1 2011 – annual indexing of fees – decrease of 8.15% plus waiver of all non transportation impact fees – effective July 1 2011 – sunset June 29 2012
- July 1 2012 – annual indexing of fees – increase of 0.70% - effective date October 1 2012 plus extension of waiver of all non transportation impact fees
- July 1 2013 – annual indexing of fees – decrease of 6.45% - Effective July 1 2013 plus extension of waiver of all non transportation impact fees – sunset date April 19 2014
- April 2014 – waiver extended until October 1 2014 to complete the study

Let me know if you need more detail.

Thanks

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"To Exceed Expectations in the Delivery of Public Services"

From: Jubb, Claire
Sent: Wednesday, May 21, 2014 2:44 PM
To: Davis, Roger; Flores, Hector; Burger, Gordon
Subject: FW: Population numbers

All,

This is the source data for the population projections used in the Impact Fee Study.

Thanks

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From: Trepal, Matthew
Sent: Wednesday, May 21, 2014 2:20 PM
To: Jubb, Claire
Subject: RE: Population numbers

Claire:

Attached are population projections we had prepared following the 2010 Census, done by the same firm that prepared the projections for the comprehensive plan. These projections were used in the preparation of the 2014 Water Supply Facilities Work Plan (which was just completed).

Matt Trepal
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Planning Section
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"To Exceed Expectations in the Delivery of Public Services"

Please visit our [Smart Charlotte 2050 website](#) and view the Comprehensive Plan

From: Jubb, Claire
Sent: Wednesday, May 21, 2014 1:38 PM
To: Trepal, Matthew
Subject: Population numbers

Hi Matt,

You had supplied some population figures for the impact fee study, can you send them to me and reference where they came from (I believe they came from the Comp Plan).

Thanks

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CHARLOTTE COUNTY POPULATION PROJECTIONS 2010-2050

This worksheet presents population projections prepared for Charlotte County for use in the Smart Charlotte 2050 comprehensive plan update. These projections are intended to be used as population projections for all Charlotte County uses by all County departments.

October, 2011

YEAR	2010	2015	2020	2025	2030
Permanent Population	159,978	168,000	176,500	184,701	192,601
Seasonal Population	15,615	16,081	16,538	16,943	17,292
Hotel/Motel Population	3,224	3,338	3,444	3,558	3,665
Total Seasonal	18,839	19,419	19,982	20,501	20,957
<i>Total Population</i>	178,817	187,419	196,482	205,202	213,558
YEAR	2035	2040	2045	2050	
Permanent Population	200,000	206,701	212,800	217,901	
Seasonal Population	17,574	17,776	17,909	17,944	
Hotel/Motel Population	3,779	3,885	3,999	4,106	
Total Seasonal	21,353	21,661	21,908	22,050	
<i>Total Population</i>	221,353	228,362	234,708	239,951	