



MEMORANDUM

Date: 10/16/2018

To: Kelly Shoemaker and Hector Flores

From: Claire Jubb, Community Development Director

Subject: Impact Fee – Historical Information

Kelly, Hector,

I have researched the history of impact fees in Charlotte County going back to the fee schedule that was in place prior to the change in 2006. Below is a comprehensive list of all the changes, either by ordinance or updates because of provisions in the impact fee code.

The dates associated with each ordinance are the dates the ordinances were signed and I have included a brief description of the action taken. I have all the ordinances and fee schedules if you need more information.

- 5-22-1998 – Impact fee schedule implemented at a 5% discount of recommended fee. This fee stayed in place until June 1 2006.
- 2-28-2006 the BCC adopted Ordinance 2006-018 which adopted a new impact fee schedule based on a technical report. The fees were increased significantly along with a dramatic change in the methodology for assessing the fees for residential construction. Rather than being assessed per unit, this fee schedule assessed residential at a square footage basis so larger homes paid more. It also allowed for additions to existing single family homes to be charged. This fee was to become effective on June 1 2006.
- 5-22-2006 the BCC adopted Ordinance 2006-055. This ordinance recognized an error in the technical study and therefore the fee schedule adopted in the prior action. As a result, the fee schedule was amended and the resulting impact fee lowered in certain categories. The implementation date of June 1 2006 was not altered.
- 10-1-2007 – Annual Indexing of the impact fees was completed and implemented resulting in a decrease in the impact fees of 6%. (Please note, the memo detailing this calculation has not been located to verify the calculation).
- 10-23-2007 – The BCC adopted Ordinance 2007-076. This action rolled back the residential impact fees from those approved in 2006 (amended in 2007) back to those implemented in 1998. This was effective January 22 2008 and included a provision which, in the absence of further action by the Board, would sunset this ordinance on January 22 2009.
- 11-13-2007 – The BCC adopted Ordinance 2007-078. This action rolled back the commercial impact fees from those approved in 2006 (amended in 2007) back to those implemented in 1998. This was effective

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February 12 2008 and included a provision which, in the absence of further action by the Board, would sunset this ordinance on February 12 2009.

- 1-13-2009 – The BCC adopted Ordinance 2009-001. This action extended the temporary rollback of the impact fees previously approved in 2007-076 and 2007-078 for a further six months to July 22 2009 (residential) and August 12 2009 (commercial).
- 5-12-2009 – The BCC adopted Ordinance 2009-021. This action further extended the rollback of both residential and commercial impact fees to September 7 2009.
- 6-9-2009 – The BCC adopted Ordinance 2009-026. This ordinance was a significant shift in the methodology for impact fee collection from essentially equal fees across the county to a tiered approach based on distance from the urban service area. The County was split into five areas, Urban, Englewood Fire District, Rural One, Rural 2 and Babcock with Rural Two being the costliest and the furthest away from existing infrastructure. This fee structure was to become effective as on September 7 2009 as 2009-021 sunset.
- 7-1-2010 – Per the Impact Fee Ordinance, an annual adjustment was performed. The result was a reduction in the fees of 8.84%
- 6-28-2011 – The BCC adopted Ordinance 2011-025. This action retained the tiered impact fee structure adopted in 2009-026 but waived all categories other than the transportation impact fees. This was effective immediately and barring other action by the Board, would sunset on June 28 2012. The annual adjustment for 2011, which was calculated to be a reduction of 8.15%, was incorporated into the adopted fee schedule at this time.
- 7-10-2012 – The BCC adopted Ordinance 2012-024. This action extended the waiver of all impact fee categories other than the transportation impact fees for another year. Barring any other action from the Board, this would sunset on July 10 2013.
- 10-1-2012 – Per the Impact Fee Ordinance, an annual update was performed. The result was an increase of 0.7% which went into effect on October 1 2012.
- 7-1-2013 – Per the Impact Fee Ordinance, an annual update was performed. The result was a reduction in the fees of 6.45%. This went into effect on July 1 2013.
- 6-25-2013 – The BCC adopted Ordinance 2013-019 which extended the waiver of all impact fee categories other than transportation impact fees. Barring any other action from the Board, this would sunset on April 10 2014.
- 3-25-2014 – The BCC adopted 2014-010 which extended the waiver of all impact fee categories other than transportation impact fees. Barring any other action from the Board, this would sunset on September 30 2014.
- 9-23-2014 - The BCC adopted 2014-025 which extended the waiver of all impact fee categories other than transportation impact fees. Barring any other action from the Board, this would sunset on April 27 2015.
- 4-14-2015 - The BCC adopted 2015-013 which extended the waiver of all impact fee categories other than transportation impact fees. Barring any other action from the Board, this would sunset on July 14 2015.
- 4-17-2015 – The BCC adopted 2015-014 which adopted a new impact fee structure reverting a single fee structure across the county rather than a tiered structure. The fees were adopted at 40% of those recommended by the technical reports prepared as part of this study. The fees were effective on July 15 2015.
- 6-26-2018 – The BCC accepted the annual indexing of the impact fees for 2017 and 2018 with increases of 4.77% and 4.22% respectively. These fees were effective October 1 2018.

The table below summarizes these changes and shows the effect on the cost of impact fees for a 2000sq.ft single family home.

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Impact Fee History Summary Table

Board Action Date	Effective Date	Single Family Home Impact Fee (total fee)	Summary of changes
5/22/1998	5/22/1998	\$ 2,510.00	Impact fee adopted at 95%
5/22/2006	6/1/2006	\$ 7,780.00	\$3.89 per sq.ft based on 2000 sq.ft home
10/1/2007	10/1/2007	\$ 7,320.00	\$3.66 per sq.ft based on 2000 sq.ft home
10/23/2007	1/22/2008	\$ 2,510.00	Returned to 1998 adopted fee
1/13/2009	1/22/2009	\$ 2,510.00	Remained at 1998 adopted fee
5/12/2009	7/22/2009	\$ 2,510.00	Remained at 1998 adopted fee
6/9/2009	9/7/2009	\$ 4,002.00	Tiered methodology introduced - example based on urban zone
7/1/2010	7/1/2010	\$ 3,649.00	Annual Indexing - reduction of 8.84%
6/28/2011	6/28/2011	\$ 1,832.00	Transportation fee only - example based on Urban zone
7/10/2012	7/10/2011	\$ 1,832.00	Transportation fee only - example based on Urban zone
10/1/2012	10/1/2012	\$ 1,845.00	Transportation fee only - example based on Urban zone. Increase of 0.7% due to annual indexing
7/1/2013	7/1/2013	\$ 1,726.00	Transportation fee only - example based on Urban zone. Decrease of 6.45% due to annual indexing
6/25/2013	7/10/2013	\$ 1,726.00	Transportation fee only - example based on Urban zone
3/25/2014	7/10/2014	\$ 1,726.00	Transportation fee only - example based on Urban zone
9/23/2014	9/30/2014	\$ 1,726.00	Transportation fee only - example based on Urban zone
4/14/2015	4/27/2015	\$ 1,726.00	Transportation fee only - example based on Urban zone
4/17/2015	7/15/2015	\$ 3,482.00	All categories adopted at 40%
6/26/2018	10/1/2018	\$ 3,803.00	Annual indexing - increase of 4.77% and 4.22%

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