

# Sumter County

Roadway Impact Fee Study – DRAFT

October 22, 2019



# Presentation Overview

**1) Background/Purpose**

**2) Key Findings**

**3) Technical Analysis**

**4) Next Steps**

# Background/Purpose

## **Sumter County:**

- Implemented in 2001
- Last updated in 2015
- 5-year update cycle to comply with ordinance requirements

# Background/Purpose

## **Impact Fee Definition:**

- One-time capital charge to new development
- Covers the cost of new capital facility capacity
- Implements the Capital Improvement Element (CIE) and Capital Improvement Plan (CIP)

# Background/Purpose

## Why Impact Fees?

- Maintain current level-of-service (LOS)
- Calculate the cost of growth
- Potential large developments
- Most needed when:
  - High growth
  - Limited funding

# Background/Purpose

## Consumption-Based Methodology:

- Common methodology used by many Florida jurisdictions
  - Including Sumter County's adopted road impact fee
- Charges new growth based on its consumption of capacity
- Fees are calculated at a rate that cannot correct existing deficiencies

# Background/Purpose

## Basic Impact Fee Formula:

$$\text{Net Impact Fee} = (\text{Cost} - \text{Credit}) \times \text{Demand}$$

Cost to add capacity

Non-impact fee revenue from future development

Vehicle-miles of travel

# Presentation Overview

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# Key Findings

## Input Variable Changes: Single Family (2,000 sf)

Input Variable	Calculated Change	Effect on Final Fee Rate
Demand	↓	↓
Cost per Resident	↑	↑
Credit	↑	↓
Net Impact Fee	-	↑ +15%*

} +20%

\*Input change from the 2015 report, full calculated rate

# Key Findings

## Calculated Roadway Impact Fee Rates

Land Use	Unit	Sumter County FULL	Sumter County FULL	Percent Change
Study Date	-	<b>2019</b>	2015	-
Assessed Portion	-	<b>100%</b>	100%	-
Single Family	du	<b>\$6,664</b>	\$5,812	+15%
Retirement Community	du	<b>\$2,430</b>	\$1,902	+28%
Light Industrial	1,000 sf	<b>\$3,011</b>	\$3,705	-19%
Office (50k sq ft)	1,000 sf	<b>\$5,918</b>	\$8,236	-28%
Retail (125k sq ft)	1,000 sf	<b>\$9,436</b>	\$9,507	-1%
Bank w/Drive-In	1,000 sf	<b>\$14,512</b>	\$20,020	-28%
Fast Food w/Drive-Thru	1,000 sf	<b>\$70,984</b>	\$67,179	+6%

Sumter County ADOPTED	Percent Change
2015	-
<b>37-50%</b>	-
\$2,600	+156%
\$901	+170%
\$1,584	+90%
\$3,591	+65%
\$3,637	+159%
\$8,528	+70%
\$29,136	+144%

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- 3) Technical Analysis**
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# Technical Analysis

## Roadway Impact Fee Variables:

- Demand Component

- Trip Generation Rate, Trip Length, % New Trips

- Cost Component

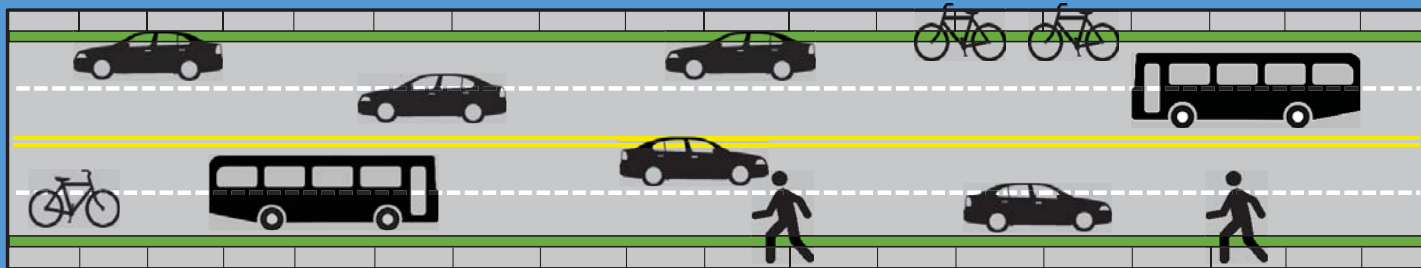
- Roadway Capacity

- Credit Component

- Non-impact fee roadway capacity expansion funding

# Technical Analysis: Consumption-Based

$$\text{One Lane Mile} \approx \$5.09 \text{ M} \div \text{Capacity} \approx 11,600 = \text{Person-miles of capacity} \approx \$440$$



Total Credit  $\approx$  \$1,700

**Fee  $\approx$  \$6,660**



Total Impact  
Cost  $\approx$  \$8,360

=

19.0 vehicle-  
miles of daily  
travel

X



# Technical Analysis

## *Demand Component*

- **Sources:**

- National ITE Reference
- Florida Studies Database
- Central Florida Regional Planning Model (CFRPM v6.1)

- **Demand Calculation:**

- Trip Gen. Rate x Trip Length x % New Trips

# Technical Analysis

## Demand per Unit of Development:

- Trip Generation Rate = Number per day
- Trip Length = Travel A to B
- % New Trips = Accounts for trips already on the roadway
- Interstate/Toll Adjustment Factor = Accounts for interstate & toll trips (not charged)

# Technical Analysis

## Single Family Residential Example:

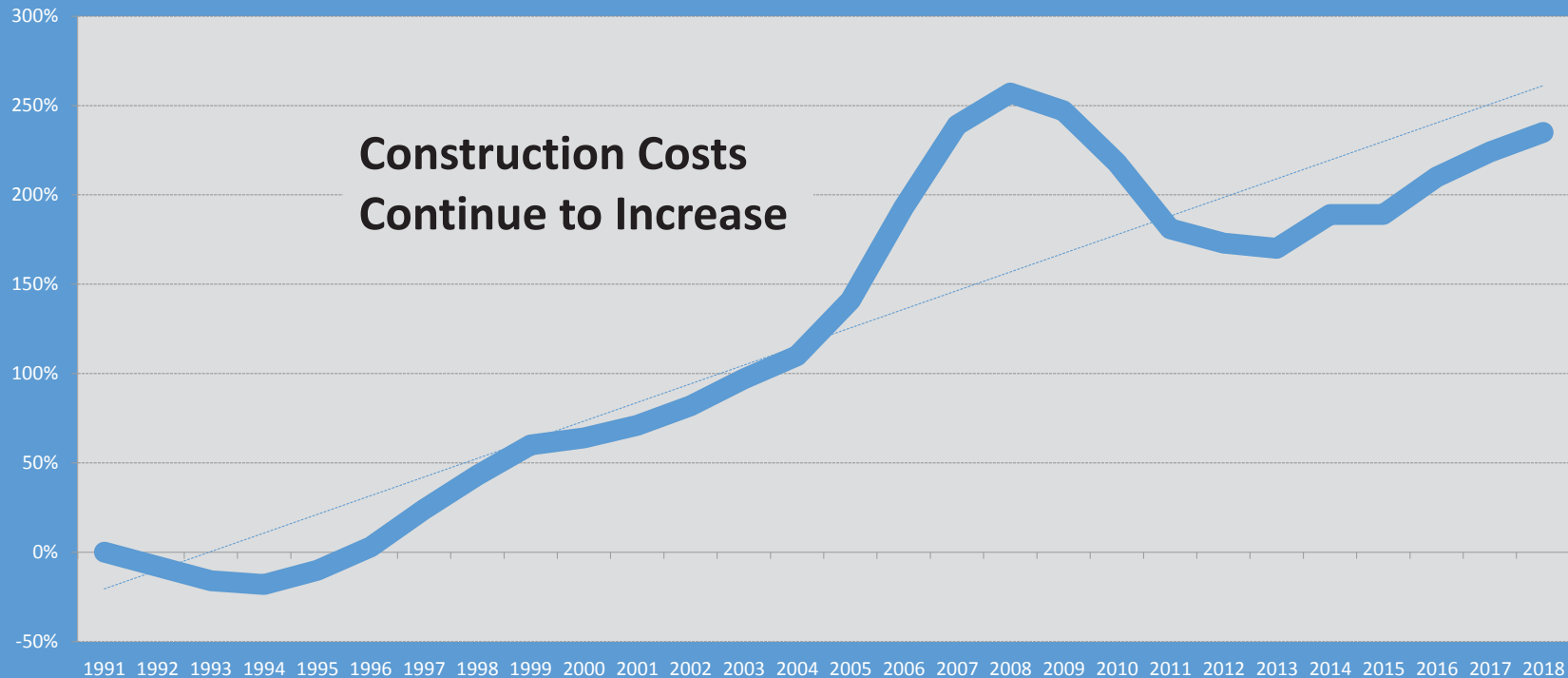
- Trip Generation Rate = 7.81
- Trip Length = 6.62
- % New Trips = 100%
- I/T Adj. Factor = 26.5%

$$(7.81 * 6.62 * 100\% / 2) * (1 - 26.5\%) = 19.00$$



# Technical Analysis

FDOT LRE Construction Cost - Cumulative Growth Trend (3-yr Avg)





# Technical Analysis

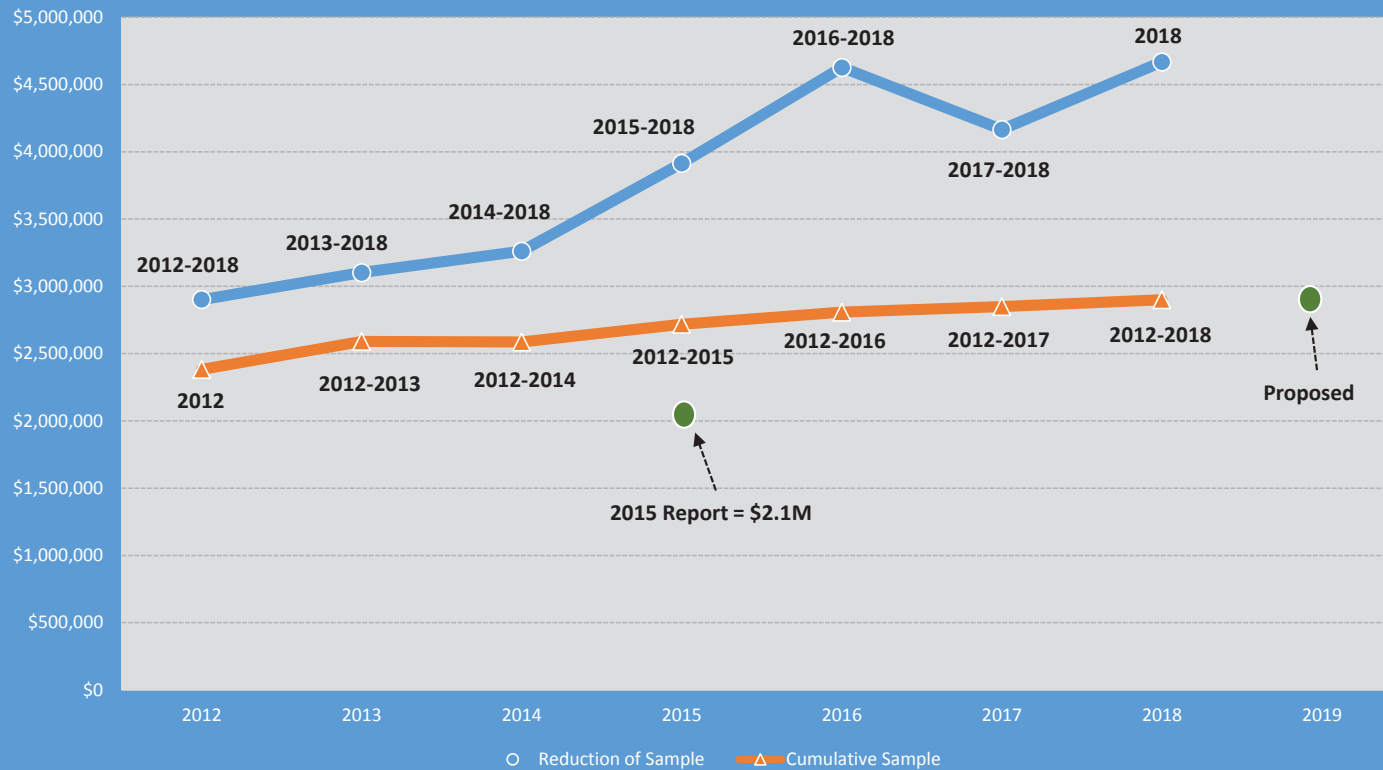
## *Cost Component – County Roads*

- **Sources:**

- Recent Sumter County construction
  - C-466A, Phase III from US 301 N to Powell Rd
- Recent new construction/lane addition projects throughout Florida
  - 38 improvements across 13 different counties; 173 lane miles

# Technical Analysis

## Cost Trend – County Roads



Proposed:  
**\$2,900,000** for construction  
 Urban/Curb & Gutter Design

# Technical Analysis

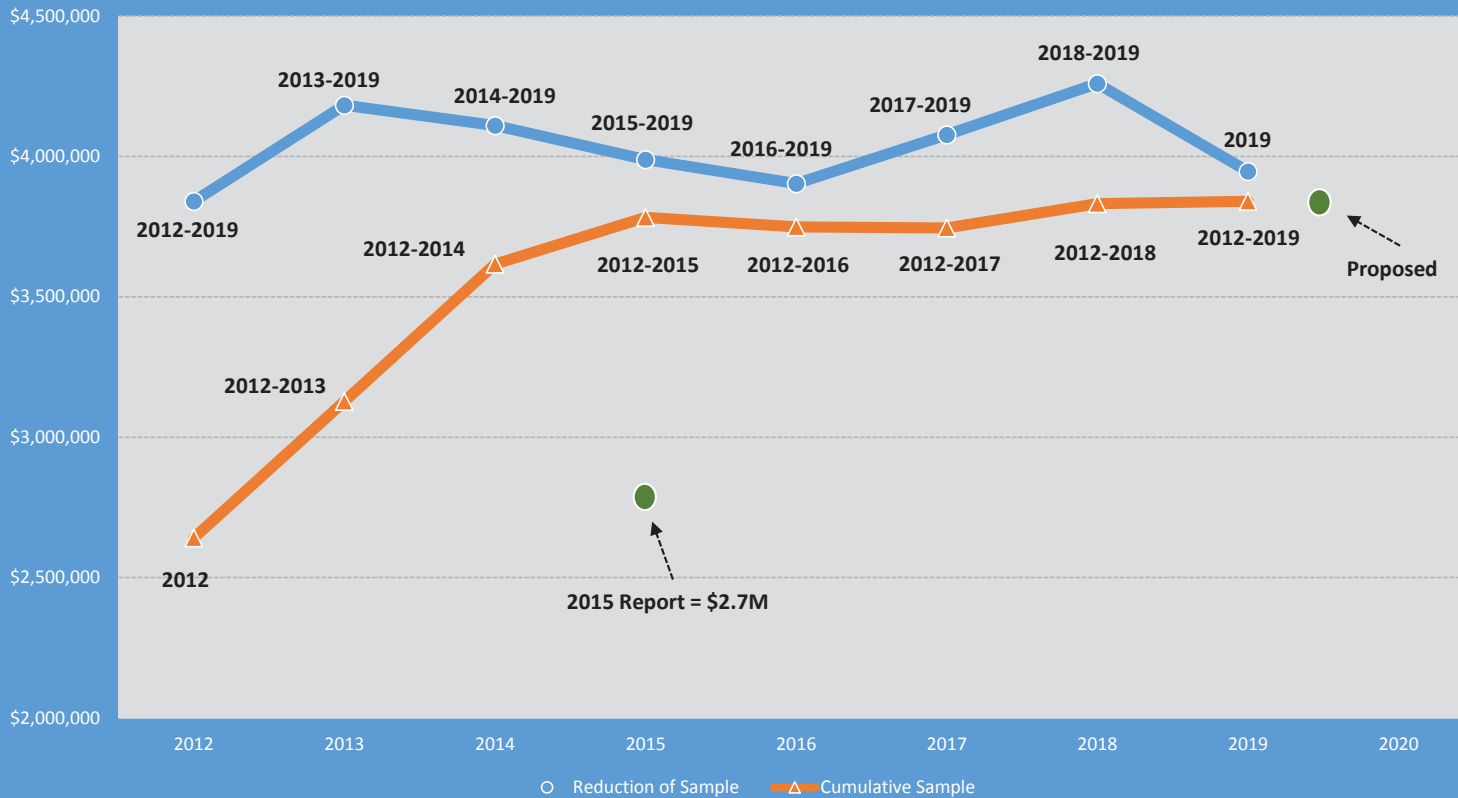
## *Cost Component – State Roads*

- **Sources:**

- No recent local Sumter County improvements
- Recent new construction/lane addition projects throughout Florida
  - 77 improvements across 34 different counties; 439 lane miles

# Technical Analysis

## Cost Trend – State Roads



Proposed:  
**\$3,800,000** for construction  
 Urban/Curb & Gutter Design

# Technical Analysis

## Estimated Cost per Lane Mile

Phase	County Roads*	State Roads*	Weighted Average
Design	\$315,000	\$370,000	\$342,000
Right-of-Way	\$1,202,000	\$1,447,000	\$1,322,000
Construction	\$2,862,000	\$3,365,000	\$3,108,000
Con. Eng. & Inspections (CEI)	<u>\$258,000</u>	<u>\$370,000</u>	<u>\$313,000</u>
<b>Total</b>	<b>\$4,637,000</b>	<b>\$5,552,000</b>	<b>\$5,085,000</b>
Lane Mile Distribution**	51%	49%	-

\*Includes a reduction to account for rural-open drainage construction, which is less expensive than curb & gutter

\*\*Source: Lake-Sumter MPO Long Range Transportation Plan & the Sumter County Capital Improvement Plan

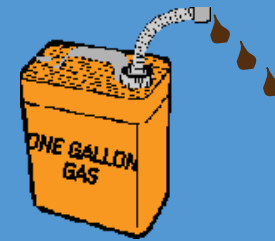
# Technical Analysis

## *Cost Component*

- Roadway Cost = \$5,085,000
- Capacity = 11,600 person-miles
- Cost per PMC = **\$438**

# Transportation

## Credit Component:



\$.01 penny

**1 CENT  
GAS TAX  
PER GALLON**



# Technical Analysis

## *Credit Component*

- Revenue Sources

- ✓ County funding (fuel tax/grants)
- ✓ State funding
- ✓ This is NOT a developer credit for construction

# Technical Analysis

## Equivalent Pennies of Fuel Tax Revenue

Credit	Avg. Annual Expenditures	Value per Penny	Equiv. Pennies per Gallon	\$\$ Credit (Single Family)
County Revenues	≈\$12,300,000	\$923,312	\$0.133	\$1,170
State Revenues	≈ <u>\$5,200,000</u>	\$923,312	<u>\$0.056</u>	<u>\$495</u>
<b>Total</b>	<b>≈\$17,500,000</b>		<b>\$0.189</b>	<b>\$1,665</b>

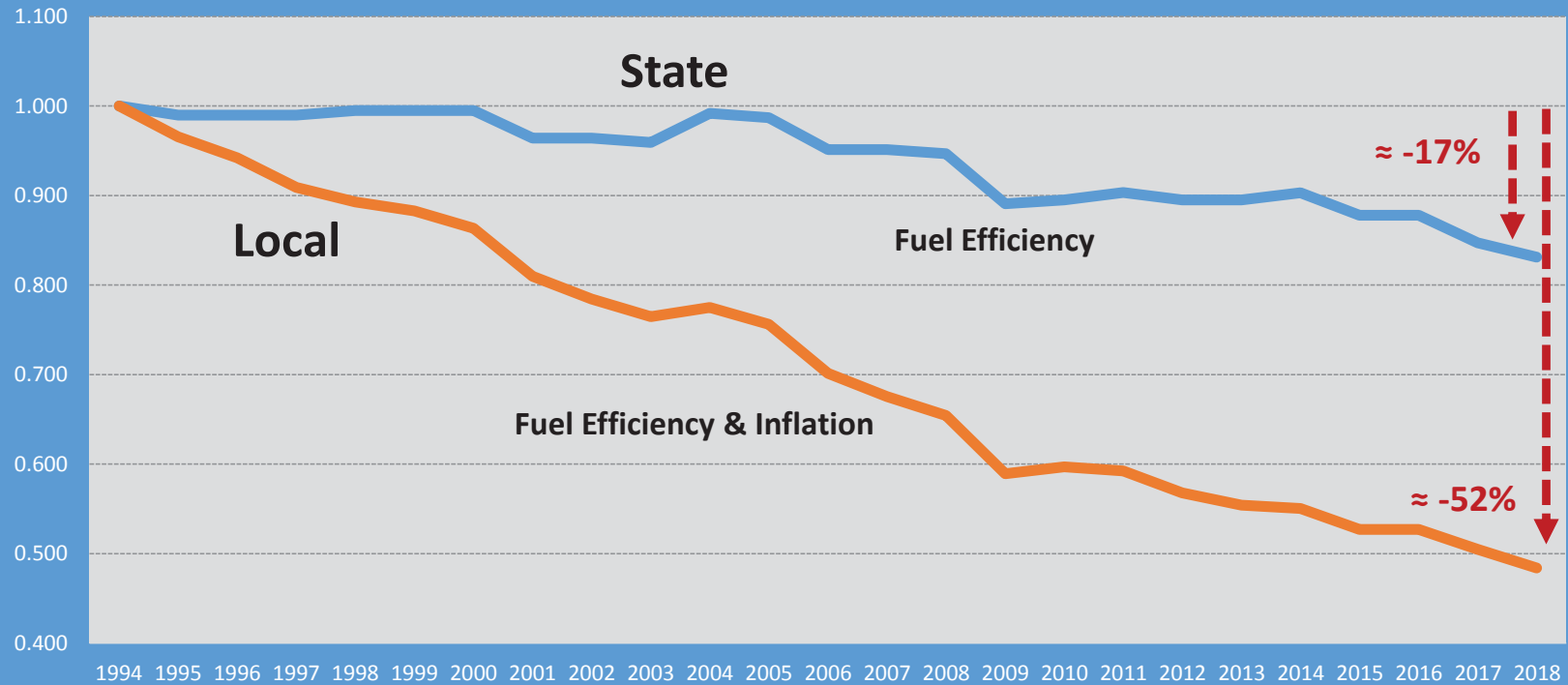
# Technical Analysis

Decrease in Value of 1¢ of Fuel Tax

- Fuel Taxes:
  - ✓ State tax indexed
  - ✓ Local tax NOT indexed
- Other revenue sources are indexed

# Technical Analysis

## Decrease in Value of 1¢ of Fuel Tax



# Technical Analysis

## *Single Family (2,000 sq ft):*

- Net PMT = 19.00
- Cost per PMC = \$438.36
- Total Impact Cost = \$8,329
- Revenue Credit = \$1,665
- **Calculated Impact Fee Rate = \$6,664**

$$\text{Net Impact Fee} = (\text{Cost} - \text{Credit}) \times \text{Demand}$$

# Technical Analysis

## Calculated Roadway Impact Fee Rates

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# Technical Analysis

## Transportation Impact Fee Rate Comparison

Land Use	Unit	Sumter Calculated	Sumter Calculated	Sumter Adopted	Sumter FULL	Lake CENTRAL*	Pasco RURAL	Citrus**	Hernando	Marion***	Polk**
Study Date	-	2019	2019	2015	2015	2019	2018	2014	2013	2015	2015
Assessed Portion	-	100%	40%	37-50%	100%	26%	100%	50%	22%	10-20%	100%
Single Family (2k sf)	du	\$6,664	\$2,666	\$2,600	\$5,812	\$1,000	\$9,800	\$1,697	\$1,269	\$1,397	\$2,155
Retirement Community	Du	\$2,430	\$972	\$901	\$1,902	\$412	\$3,280	\$654	\$414	\$184	\$1,351
Light Industrial	1,000 sf	\$3,011	\$1,204	\$1,584	\$3,705	\$638	\$0	\$584	\$806	\$428	\$666
Office (50k sq ft)	1,000 sf	\$5,918	\$2,367	\$3,591	\$8,236	\$935	\$0	\$1,687	\$1,516	\$676	\$2,237
Retail (125k sq ft)	1,000 sfgla	\$9,436	\$3,774	\$3,637	\$9,507	\$1,095	\$8,813	\$1,248	\$1,884	\$1,014	\$3,808
Bank w/Drive-In	1,000 sf	\$14,512	\$5,805	\$8,528	\$20,020	\$7,589	\$15,582	\$1,248	\$4,257	\$2,260	\$3,808
Fast Food w/Drive-Thru	1,000 sf	\$70,984	\$28,394	\$29,136	\$67,179	\$7,589	\$50,978	\$1,248	\$17,397	\$2,803	\$3,808

\*Includes the City of Leesburg

\*\*Retail rate is shown for Bank and Fast Food land uses

\*\*\*Quality restaurant rate is shown for Fast Food land use

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# Next Steps

- Final Technical Report Adoption
- Implementation Process
  - Public Hearing of November 12, 2019