

EXECUTIVE SUMMARY

Tindale-Oliver and Associates, Inc. (TOA) was retained by the Lake County Board of County Commissioners to prepare a comprehensive update of the Transportation Impact Fee program. This report assesses the use of Transportation Impact Fees to partially finance Roadway Capital Improvement projects. The road projects eligible for funding through impact fees are those necessary to serve development in the county and maintain adequate acceptable levels of service.

The county has had a Transportation Impact Fee in effect since 1985. The last update to the Transportation Impact Fee Program was in 1994. Thus, this study will recommend revisions to the existing impact fee structure, including the demand, cost and credit components.

The impact fee calculations presented in this technical report are based upon the proportionate or fair share cost of typical facilities necessary to accommodate growth and development in Lake County. The cost component of the Transportation Impact Fee is reduced by the offset amount which corresponds to other revenue sources which are available as a result of new development that can be used to pay for necessary infrastructure capacity. The use of the offset avoids double-charging development for necessary facilities.

The demand created by each land use was developed through the use of the Institute of Transportation Engineers Trip Generation publication, data collected by the consultant for other Florida communities, and data collected by the consultant from studies conducted in Lake County. Use of this data results in a more equitable set of demand data for each land use category contained in the Lake County Impact Fee Schedule.

A summary of the impact fee rates for five key land uses is presented in the following table. The five key land uses illustrated in this table include single family for the 1,500 to 2,500 square feet of living area, general light industry, office for 30,000 to 100,000 square feet, fast food restaurant, and general commercial for 50,000 to 200,000 square feet. The table illustrates the existing Lake County impact fee, the potential Lake County impact fee at 100% of cost, and the potential Lake County impact fee at an across the board reduction of 36.6%. It should be noted that the 36.6% across the board reduction reflects a cost component that excludes the impact

**Summary Table
of
Potential Lake County
Transportation Impact Fees**

Land Use Description	Units	Existing Lake County Impact Fee	Potential Lake County Impact Fee At 100% of Total Cost (FDOT and County Roads)	Potential Lake County Impact Fee At 64.4% of Total Cost (Based on County Road Costs Only)
Single Family 1,500 to 2,500 SF living area	Dwelling Unit	\$1,343	\$3,453	\$2,189
General Light Industry	1,000 SF	\$1,907	\$3,403	\$2,157
Office Between 30,000 and 100,000 SF	1,000 SF	\$2,727	\$4,548	\$2,883
Fast Food Restaurant	1,000 SF	\$1,827	\$27,928	\$17,706
General Commercial Between 50,000 and 200,000 SF	1,000 SF	\$604	\$3,434	\$2,177

costs of state road projects and only includes costs associated with county road projects. The impact fee rates resulting from the 36.6 percent across the board reduction are the same as the rates recommended by the Impact Fee Evaluation and Review Committee (IFERC). However, it was the recommendation of the IFERC to base the impact fee on 100 percent of the construction cost associated with only county roads.

The Board of County Commissioners has the option of implementing the impact fee at a percentage of the total construction cost and then phasing the implementation of subsequent rate increases over the next several years. This is similar to the approach previously used by the Board of County Commissioners in implementing past rate increases.

LAKE COUNTY TRANSPORTATION IMPACT FEE STUDY

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SECTION 1

INTRODUCTION

Lake County's Transportation Impact Fee Ordinance was originally adopted in 1985. The purpose of the impact fee program was to assist the County in providing funding for transportation facilities needed to accommodate expected growth. Provisions in the Ordinance require it to be periodically updated to account for changing economic and financial needs. The program was updated in 1991 and 1994. The County has retained Tindale-Oliver and Associates to complete an update study of the Transportation Impact Fee Program. This update will result in a study report that includes the following sections:

- Introduction
- Review of Transportation Impact Fee System
- Update of Cost Component
- Update of Capital Funding Offset Component
- Local Trip Characteristic Studies
- Update of Demand Component and Land Use Classifications
- Review of Benefit Districts
- Development of Administrative Procedures Manual
- Transportation Impact Fee Schedule and Implementation Alternatives

SECTION 2
REVIEW OF TRANSPORTATION IMPACT FEE SYSTEM

Review of Current Study and Impact Fee Formula

The transportation component of the 1994 Comprehensive Impact Fee Study was reviewed as part of this update to the Transportation Impact Fee Program. The results of this review indicate that the data and approach used to develop the Transportation Impact Fee for Lake County are reasonable. However, review of the Impact Fee Formula reveals an error in the impact fee offset component of the Impact Fee Formula. The formula for the calculation of the cost component includes what is called a “Linked Trip Factor” which divides the cost component by two. This is a standard practice used throughout the state of Florida for development of impact fees. As it is called, the Linked Trip Factor, results in only charging one half of the trips to each land use. The concept is that the remaining trips to the land use should be charged to the use where they came from. The Linked Trip Factor should also be included in the offset component. However, in the impact fee offset component used in Lake County, the Linked Trip Factor is missing. Thus, the impact fee offset is calculated at twice the amount for each land use contained in the Lake County Impact Fee Ordinance. The effect of this error is that the impact fees being collected in Lake County are approximately 26% lower than what the fees would have been had the Linked Trip Factor been included in the impact fee offset formula. In essence, Lake County has been giving a 26% discount on the impact fees paid for each land use the last several years.

Review Rates of Surrounding Counties

The impact fee programs of counties in the immediate vicinity of Lake County were reviewed as part of the update to the Transportation Impact Fee Program. A summary of this review is included in Table 21. Counties reviewed include Seminole, Orange, Marion, and Volusia Counties. Sumter County currently does not have a Transportation Impact Fee. However, discussions with county officials in Sumter County indicate that they are in the process of implementing a transportation impact fee program.

Information in Table 2-1 includes five land uses that are used for comparison purposes for all counties. The units of measure and corresponding fee for each land use are included in Table 2-1. Finally, the current status of the impact fee program as to when it was last updated or if it is currently being updated are also included in Table 2-1.

**Table 2-1
Impact Fee Schedules of Adjacent Counties**

	Units	Lake County - Existing (1)	Seminole County	Volusia County	Orange County	Marion County (2)
Last Update	N/A	1994	1991	2001	2001	2001
Single Family	Dwelling	\$1,343	\$1,271	\$1,184	\$2,075	\$1,890
Light Industry	1000 sq ft	\$1,054	\$944	\$700	\$1,742	\$1,092
Office > 30,000 < 100,000 S.F.	1000 sq ft	\$4,037	\$2,785	\$1,310	\$3,734	\$2,867
Fast Food Restaurant	1000 sq ft	\$1,827	\$16,991	\$13,080	\$19,806	\$11,670
Retail > 50,000 < 100,000 S.F.	1000 sq ft	\$941	\$6,166	\$1,970	\$10,327	\$2,724

(1) 3- bedrooms

(2) Pending adoption at 70% of calculated fee

A review of the various rates for the land uses included in Table 21 indicates that Lake County’s rate for retail fast food and light industry is significantly lower than the rates of surrounding counties. For the single family home, the rate in Lake County is comparable to Seminole and Orange County, but significantly lower than the rate in Orange and proposed rate in Marion County. It should also be noted that the rate structure provided for Seminole County has not been updated since 1991 and the rate shown for Marion County are currently being considered by the Board of County Commissioners and is scheduled to be acted on during the month of June, 2001.

Legal Analysis and Review of Ordinance

The following analysis discusses the legal issues presented by the transportation impact fee format utilized by Lake County. Initially, the memorandum will discuss the general scheme

utilized by Lake County in applying the transportation impact fee and calculating the amount thereof. Thereafter, the memorandum will examine the exemptions and waivers provided in the general impact fee ordinance and the exemptions and waivers specific to the transportation impact fee ordinance.

Imposition of the Impact Fee

Initially, as described above, impact fee jurisprudence mandates that a local government be able to show a “reasonable connection” or “rational nexus” between the impact fee collected and the impact of the proposed development on the public services of facilities for which the fee was collected. This is shown in two ways:

- 1) the fees must offset needs sufficiently attributable to the growth in population generated by the new development; and
- 2) the funds collected must be sufficiently earmarked for the substantial benefit of the new development.

With regard to the first of these inquiries, there is ample support in the Comprehensive Plan indicating that future growth necessitates expansion of County facilities, specifically including transportation facilities. Objectives and Policies found throughout the Future Land Use, Traffic Circulation, and Capital Improvement Elements of the Comprehensive Plan support the imposition of transportation impact fees, describing the impact of new development on existing services and adopting minimum levels of service for County roadways. The Impact Fee Study utilizes extensive data, both local and national, to solidify these conclusions into economic realities. The demand/ needs-driven approach utilized in the analysis appears sufficient to tie the ultimate fee charged to the actual impact of the development, with variables such as land use and size accounted for.

Further, the subject ordinance utilizes a tiered structure for the calculation of the transportation impact fee. The tiering of impact fees is relatively new, however, is defensible under prevailing law in the impact fee area.

In analyzing the appropriateness of impact fee calculations, the first prong of the dual rational nexus test is the focal point. In essence, the fee must offset needs sufficiently attributable to the

growth in population generated by the new development. Tiering arguably permits an even more direct relationship to be drawn between the impact of the development and the fee charged due to its fine tuning of the anticipated number of residents causing impact. Nicholas, "On the Progression of Impact Fees," Journal of the American Planning Association, Vol. 58, No. 4, Autumn 1992, p. 519-523.

With regard to the second factor analyzed in the dual rational nexus test as described above, the inquiry is one of whether the funds collected are sufficiently earmarked for the substantial benefit of the new development. The Lake County Ordinance divides the County into 6 Road Benefit Districts and limits use of fees collected to use within the Road Benefit District in which the funds were collected. The Ordinance permits the use of funds outside the benefit district in which the fee is collected only upon a finding by the Board of County Commissioners that the use directly benefits the district in which the fees were collected. This approach is commonly used and, providing that the districts are appropriately drawn, should satisfy the second prong of the dual rational nexus test.

Further, with regard to the allocation of fees collected to the Road Benefit District from which the fees were collected, the subject ordinance provides, in section 15.02.09(E), that "[all] Road impact fee funds collected Shall be deposited in a separate Road Benefit District Account." It is unclear from the language utilized whether there is a separate trust account for each district. As an initial matter, we recommend clarifying the ordinance to make this provision clear. We recommend the creation and use of separate trust accounts for each benefit district. This further establishes compliance with the second prong of the dual rational nexus test.

Finally, the Ordinance provides that "the Board of County Commissioners may choose to allocate interest earned in any impact fee trust fund to be used to provide waivers as provided herein for similar impact fees." It is our opinion that utilizing funds, including interest, from other impact fee sources is problematic. As discussed above, it is important in satisfying the second prong of the "dual rational nexus" test that impact fees collected for roads be limited to use on road and transportation projects. By the County allowing interest on these road funds to be used to fund non-road-related purposes (e.g. affordable housing, day care, etc.) may run afoul of this segregation requirement as well as the first prong of the "dual rational nexus" test. Moreover, the moneys from different impact fee trust funds may, under this provision, be commingled or used for unrelated public facilities (i.e., the road impact fee interest may be used

to fund waivers which include water impact fee waivers). We would recommend removing this option as a source of recovering the short-fall created by any waivers or exemptions.

Legal analysis of exemptions/waivers

The current ordinance creates several exemptions to impact fees, including low and very low income housing, industrial use, day-care, and certain agricultural exemptions. It is important to recognize that only a few cases have been found that discuss the constitutionality of impact fee exemptions. However, a review of the body of case law regarding each of these substantive areas and impact fees generally indicates that these exemptions are legally defensible. Generally, for an exemption to be upheld, it must, at a minimum, be rationally related to a legitimate state interest and satisfy both prongs of the “dual rational nexus” test. Loxahatchee River Environmental Control District v. School Board of Palm Beach County, 496 So.2d 930, 937-939 (Fla. 4th DCA 1986). Again, however, one must recognize that even if the exemption meets this test, there is no certainty that it will be sustained by the courts, given the absence of case law on the subject.

Low and very low income housing waiver

There is support for the proposition that the promotion of affordable housing is a legitimate state interest. The legislative findings with regard to chapter 420, Florida Statutes, governing “Affordable Housing; Coalitions for Homeless; Family Emergency Assistance” state that “Decent, safe, and sanitary housing for persons of very low income, low income, and moderate income are a critical need in the state.” Fla. Stat. §420.6015 (1999). Further statutory authority is found in chapter 163, Florida Statutes, governing community redevelopment, which states that “it is further found and declared that there exists in counties and municipalities of the state a severe shortage of housing affordable to residents of low or moderate income, including the elderly; that the existence of such condition affects the health, safety, and welfare of the residents of such counties and municipalities and retards their growth and economic and social development; and that such condition is a proper matter of state policy and state concern and is for a valid and desirable public purpose.” Fla. Stat. §163.335(5) (1999).

There is much support for an affordable housing waiver in the Lake County Comprehensive Plan. The Housing Element sets forth a goal of “safe, affordable housing for all segments of the

population by allocating sufficient land area to accommodate the diverse needs of current and future populations.” In fact, Goal 5 of the Housing Element (and several objectives and policies thereunder) support the development of “safe, affordable housing for all segments of the population.” Further, the Housing Element, in Policy 5-1.4(3) specifically describes various incentives to be utilized in encouraging the construction of affordable housing, particularly very low, low and moderate income households. Similar policies and objectives are incorporated in the Capital Improvement Element. These provisions encourage the development of affordable housing. Therefore, the impact fee waiver which promotes affordable housing may be viewed as consistent with these policies.

The more difficult questions arise from the application of the “dual rational nexus” test to exemptions. As discussed previously, the focus of this inquiry is on the relationship between the impact of the development proposed on various county facilities and the fees charged to mitigate this impact. There are obvious questions raised with regard to this relationship when certain development is exempted from paying fees, regardless of its impact on the county facilities.

It appears that the waiver is supportable, provided the “dual rational nexus” test, with regard to the calculation of the fee, is observed. Careful analysis of the impact of development on county facilities is critical (as briefly discussed above, an affordable housing waiver could be further supported by detailed analysis of the differences in facilities usage as between residents in affordable housing and market-rate housing). The calculation of the fee should closely follow this analysis, such that the first prong of the test is satisfied, that is, that the fees must offset needs sufficiently attributable to the growth in population generated by the new development. Further, careful analysis of how the waiver will further the affordable housing goals of the County is necessary to meet this prong of the test.

The second prong of the test requires that the funds collected be sufficiently earmarked for the substantial benefit of the subdivision residents. In order to achieve this, we recommend that the shortfall created by the waiver be paid out of the general fund or another unrestricted fund. Again, as set forth above, the causation-benefit analysis attendant with the “dual rational nexus” test requires that revenue shortfalls created by the exemptions “will not be absorbed by other developers who remain subject to the fee.” As described above, this waiver contains the problematic language which permits the short-fall created by the exemption to be recovered

from other impact fee sources or for the impact fee interest windfall to benefit unrelated purposes. This is problematic for the reasons outlined above and we would recommend removing this option from the Ordinance. If these issues are addressed and if the calculation of the fee is based on careful analysis, the exemption appears legally supportable.

Industrial use waiver

Industrial uses logically fall within the “broadly defined” definition of legitimate state interests. See, e.g., Fla. Stat. § 163.3177(7)(j). Here, again, it would be difficult to argue that a local government’s interest in promoting industry is not a legitimate state interest.

There is support for industrial development in the Lake County Comprehensive Plan. For example, the Economic Element provides, in Policy 11-5.10, for the maintenance of a competitive impact fee schedule that will allow Lake County to remain competitive in the region and state. In keeping therewith, the Economic Element, in Objective 11-5, sets forth the objective of creating incentive programs tailored to new industry and business. Similarly, Policy 11-1.1 of the Economic Element provides that Lake County shall create a desirable business environment that attracts and retains business. Finally, Policy 11-5.4 of the Economic Element specifically provides that “Lake County shall develop an impact fee deferral program for commercial (excluding retail) and industrial construction” and Policy 11-5.10 provides that “[t]he County shall maintain an impact fee schedule for residential, commercial and industrial development that will allow Lake County to remain competitive in the region and state.”

With respect to the issues raised by the “dual rational nexus” test, the analysis is similar to that discussed with regard to affordable housing, however, there is considerably less treatment of an industrial waiver in the caselaw. It appears that the use of a waiver would be supportable, provided the “dual rational nexus” test, with regard to the calculation of the fee, is observed. Careful analysis of the impact of development on county facilities is critical (and possibly further analysis concerning the differences, if any, in facilities usage as between industrial uses and other land uses in the County to further support the waiver). Here, again, the calculation of the fee should closely follow this analysis in order to satisfy the first prong of the test.

With regard to the second prong of the test, here again, the shortfall should be recouped in order that the shortfalls are not absorbed by the developers subject to the fee. Additionally, as

discussed previously, the shortfalls should come from the general fund or another unrestricted fund. As described above, this waiver contains the problematic language which permits the short-fall created by the exemption to be recovered from other impact fee sources or for the impact fee interest windfall to benefit unrelated purposes. This is problematic for the reasons outlined above and we would recommend removing this option from the Ordinance. If these issues are addressed and if the calculation of the fee is based on careful analysis, the exemption appears legally supportable.

Another issue concerning an industrial use waiver is the size of the waiver. Where a waiver creates a loophole that becomes the rule rather than an exception, the validity of the impact fee may be called into question based on constitutional issues. While an industrial use waiver may not affect a substantial number of developments County-wide, the larger the waiver, the more difficult it is to justify the ordinance under the dual rational nexus test. A substantial breach in the fee schedule based on an overly broad waiver may be difficult to defend. In fact, some of the “tax versus fee” arguments may be particularly applicable in a circumstance where many uses are exempted from an impact fee ordinance. However, these issues can be overcome by insuring that the exempt uses further the economic development goals of the County and that the waiver is not overly broad.

Day Care Waiver

This waiver is found in the provisions of general applicability with regard to impact fees imposed by Lake County. It provides for a waiver of up to fifty percent of the amount of the impact fee if the County Commission finds that the waiver is for good cause. There is little treatment of this type of waiver in the relevant statutes or caselaw. However, “[l]egitimate state interests have been broadly defined. They may include protection of natural resources, residential zoning, preservation of family oriented neighborhoods, prevention of economic blight in days of redevelopment activities, and landmark preservation.” Lovrien, et al. v. City of Shorewood, 1989 Minn. App. LEXIS 381 (1989). Thus, while the day care waiver does not share the caselaw treatment such as that supporting affordable housing, it would be difficult to argue that supporting business by promoting day care for children is not a legitimate state interest.

It can be inferred that this waiver was developed to promote business and commerce. As such, there are several objectives and policies within the Economic Element of the Comprehensive

Plan that are supportive of this waiver. Several policies, including Policy 11-1.1 and Policy 11-1.3 provide that Lake County shall support existing business and industry and recruit new business and industry. These policies may be served by the waiver for day care. Note that while the Comprehensive Plan contains objectives and policies aimed at the promotion of industry and commerce generally, there is no specific objective or policy that connects these interests to the provision of day care.

The more difficult issue is whether the waiver would pass muster under the dual rational nexus test. There appears to be no data in the impact fee study which would support the day care waiver and we have not otherwise been provided with data which would demonstrate differences, if any, in facilities usage as between day care centers and other land uses as would support the waiver. However, as described above, if proper data can be collected to support the application of the waiver, we believe that it is defensible. Finally, as described above, the shortfall created by the waiver should be recouped from the general fund or another unrestricted fund in order that the shortfalls are not absorbed by the developers subject to the fee. As described above, this waiver contains the problematic language which permits the short-fall created by the exemption to be recovered from other impact fee sources or for the impact fee interest windfall to benefit unrelated purposes. This is problematic for the reasons outlined above and we would recommend removing this option from the Ordinance. If these issues are addressed and if the calculation of the fee is based on careful analysis, the exemption appears legally supportable in concept.

Agricultural exemption

Agricultural uses logically fall within the “broadly defined” definition of legitimate state interests. Here, again, it would be difficult to argue that a local government’s interest in promoting agricultural development was not a legitimate state interest.

Further, there is ample support for the exemption in the Lake County Comprehensive Plan. Specifically, Objective 11-2 of the Economic Element provides that Lake County shall “maintain programs which are designed to enhance the opportunity for sustainable agricultural pursuits.” Policy 11-2.2 implements this objective by providing that Lake County “shall encourage diversified agricultural pursuits on land formerly in agricultural production.”

With respect to the “dual rational nexus” test, the analysis described above is equally applicable. Here, again, the calculation of the fee should closely follow this analysis in order to satisfy the first prong of the test. As in the day care waiver analysis, we have not been provided with data concerning the differences, if any, in facilities usage as between agricultural uses and other land uses in the County to further support the exemption. Such data would be useful in defending the exemption under the first prong of the “dual rational nexus” test. With regard to the second prong of the test, here, again, the shortfall should be recouped from unrestricted funds in order that the shortfalls are not absorbed by the developers subject to the fee. Additionally, as discussed previously, the exemption should be tailored narrowly such that the exemption is not overbroad. Assuming that these issues are addressed and that the calculation of the fee is based on careful analysis, the exemption option appears legally supportable.

Other Comments Concerning Administrative Procedures and Ordinance

Several issues arose in discussions with the Impact Fee Coordinator concerning administrative procedures and the current ordinance. These issues are summarized below along with the guidance (following each issue in italics) received from the County Administrator.

Add a formal appeal process to the ordinance to provide guidelines for applicants to challenge rulings on impact fees charged for land uses not included in the County's impact fee schedule.

Appeals should be heard through the Board of Adjustments. This process already exists.

Introduce stricter requirements for the process of prepayment of impact fees (i.e., Should unplatted subdivisions be allowed to prepay impact fees for blocks of lots not yet platted?).

Yes, require plat to be approved and recorded with specific use designated in order to apply for prepayment process

Allow provisions for certain impact fee refunds to be processed without Board of County Commissioners approval, such as when an administrative error was made.

Yes, but identify specific instances where this will be allowed such as, cancelled or expired permit, demolition, paid for permit and had prepayment certificate, had concurrency reservation but didn't use it and had low income waiver but paid for permit.

Distinguish between mobile homes in a mobile home park and mobile homes on a single-family lot, with regard to the fees charged for both. Currently all mobile homes are assessed in the same manner, regardless of whether they are located in a mobile home park or on a single-family home site.

Yes, but be careful to deal with Mobile Home Rental Park verses Condominium Mobile Home.

Add requirement of impact fees to be paid for golf courses that will be triggered other than when a clubhouse is built, such as when the land use opens for business. Similar provisions should apply to any land use that does not require a building permit.

Yes, look for trigger mechanism and use it as a control. Eventually, look at land clearing permit or occupational license permit.

Codify that impact fee refunds should be paid to the property owner and not the developer or builder, unless a notarized letter accompanies the refund request stating that refund is to be paid to developer/builder.

Owner of record should receive refund, unless he signs a release to the builder to receive the refund.

Clarify/add language to ordinance to handle minor additions to existing land uses and when impact fees should be charged. Currently, this is handled on a case-by-case basis.

All additions should pay if they cause impact, no exceptions.

Make it a requirement in the Administrative Manual that municipalities in Lake County send copies of their monthly Impact Fee Collections Report to County Impact Fee Coordinator.

Yes, put it in the Interlocal Agreements and Administrative Procedures Manual.

Clarify in the Administrative Manual, how calculations for mixed use developments are to be handled.

Yes, it will be included.

Adjust fee commercial land rates so that fee can be assessed in total square footage of building.

Yes, it will be adjusted to be gross square footage.

Other general issues:

Provide guidance in Administrative Manual concerning assessment of impact fees for the following land uses: sand/clay mines, flea markets, fruit stands, plant nurseries, apartment complex clubhouses.

Yes, they will be reviewed.

Wholesale nurseries are currently exempted, as they are considered agricultural land uses, which are exempted.

Should this continue?

Change tiering residential impact fees based on size of home as opposed to number of bedrooms.

Yes.

The above issues and their response will be considered, as appropriate in updating the Ordinance, associated Impact Fee Rate schedule and Administrative Procedures Manual.

SECTION 3

UPDATE OF COST COMPONENT

Historical Costs

A review of historical road construction costs in Lake County was conducted to get an understanding and breakdown of the costs per lane mile for right of way acquisition, design, CEI and construction costs of County roads and State roads.

County staff provided information on County built roadway construction projects completed during the last five years between 1996 and 2001. Table 3-1 provides a description of the 15 projects that were built, which include:

- Merry Road Extension from Old CR 441 to Mt. Homer Road (new 2 lanes);
- Rolling Acres Road Extension – Phase 1 and Phase 2 (new 2 lanes);
- North Hancock Road Extension from SR 50 to College Campus (new 2 lanes);
- North Hancock Road Extension from College Entrance to Levitt/Park Square Subdivisions (new 4 lanes);
- Hancock Road South Extension from Hartwood Marsh Road to Sunburst Lane (new 2 lanes);
- East Jacks Lake Road Extension (new 2 lanes);
- Bloxam Avenue (Clermont) Extension from Pitt Street to Grand Highway (new 2 lanes); and
- Old Highway 441/Heim Road from Eudora Road to 11th Avenue (widen to 3 lanes).

These projects had a total cost of \$10.8 million and resulted in 17.2 lane miles of road being added to the transportation system. The resulting cost per lane mile is \$629,705. A point to be noted with these costs is that it does not include any right of way costs. Some of the projects had right of way donated as part of development agreements, while others lacked any detailed information on right of way costs. Hence, the historical cost per lane mile of \$629,705 reflects design, Construction Engineering Inspection (CEI) and construction costs only.

Historical information on State roads constructed over the last five years was obtained from the Florida Department of Transportation, District 5 Planning Office. This information identified three State roadway construction projects in Lake County which are described in Table 3-2. The three FDOT projects as shown in Table 3-2 were primarily lane widenings to SR 530/US 92, SR 19 and SR 44. These projects had a total cost of \$27.9 million and resulted in 10.30 lane miles of State road being added to the transportation system. These projects were built at an average cost per lane mile of \$2,714,883. The average cost per lane mile of right of way amounted to \$710,798, while the average cost per lane mile for design, CEI and construction totaled to \$2,004,086.

Table 3-1 Lake County Historical County Roadway Construction Projects

Table 3-1 Lake County Historical County Roadway Construction Projects

PROJECT NAME / PROJECT LIMITS	URBAN / RURAL	DESCRIPTION	COMPLETED YR/STATUS	Length (Feet)	LENGTH (MILES)	Service Volume Capacity			NEW LANES	LANE MILES	DESIGN/ CEI COST	ROW COST	CONST. COST	TOTAL COST
						Current	Future	Added Cap.						
Project: Palmetto Drive Extension (Mascotte)														
From/To: End of Palmetto to Midway Ave.		0-2U	Feb-00	343	0.06	0	16600	16600	2	0.1299	\$ 4,566	\$0	\$ 40,755	\$ 45,321
Project: Merry Road Extension (Central)														
From/To: C-19A to US-441		0-2U	May-00	3160	0.60	0	15600	15600	2	1.197	\$ 59,011	\$0	\$ 569,583	\$ 628,594
Project: Merry Road Extension (South)														
From/To: Old C-441 to C-19A		0-2U	Jan-01	3840	0.73	0	15600	15600	2	1.4545	\$ 100,602	\$0	\$ 453,438	\$ 554,040
Project: North Hancock Road Extension														
From/To: SR-50 North 1,716' to College Campus Design cost is for entire length of North Hancock which is being done in phases		0-2U	May-00	1716	0.33	0	15600	15600	4	1.3	\$ 176,994	\$0	\$ 1,018,368	\$ 1,195,362
Project: Hancock Road South Extension														
From/To: Hartwood Marsh Road to Sunburst Lane		0-2U	May-00	7984	1.51	0	15600	15600	2	3.0242	\$ 41,217	\$0	\$ 755,053	\$ 796,270
Project: Rolling Acres Road Extension Phase 1														
From/To: US-27/441 to Oak Street		0-2U	Oct-99	4100	0.78	0	15600	15600	2	1.553	\$ 101,000	\$0	\$ 766,252	\$ 867,252
Project: Rolling Acres Road Extension Phase 2														
From/To: Oak Street		0-2U	Sep-00	2975	0.56	0	15600	15600	2	1.1269	included in Phase 1	\$0	\$ 425,638	\$ 425,638
Project: US 27/441 & CR 25 Connector (Fennell Boulevard)														
From/To: C-25 to US-27/441		0-3U	Dec-97	735	0.14	0	16380	16380	3	0.4176	\$ 27,484	\$0	\$ 264,098	\$ 291,582
Project: East Jacks Lake Road Extension														
From/To: Extension of E. Jacks Road		0-2U	Dec-99	2812	0.53	0	15600	15600	2	1.0652	\$ 145,954	\$0	\$ 973,027	\$ 1,118,981
Project: West Main Street (Tavares)														
From/To: Bloxam Ave. to SR-19		2U to 3U	May-97	1003	0.19	15600	16380	780	1	0.19	\$ 22,479	\$0	\$ 149,859	\$ 172,338
Project: Northridge Boulevard (Pitt. Street)														
N. Jack's Lake Road to East Jack's Lake Road		0-2U	Jan-00	3437	0.65	0	15600	15600	2	1.3019	\$ 234,683	\$0	\$ 1,564,552	\$ 1,799,235
Project: Merry Road Extension (North)														
From/To: US-441 to Mt. Homer Road		0-2U	Jan-98	2700	0.51	0	15600	15600	2	1.0227	\$ 80,559	\$0	\$ 537,057	\$ 617,615
Project: North Hancock Road Extension Phase 1-B														
From/To: College Entrance to Levitt/Park Square Subdivisions		0-4D	Jun-01	2200	0.42	0	32800	32800	4	1.6667	\$ 178,473	\$0	\$ 1,189,818	\$ 1,368,291

Table 3-1 Lake County Historical County Roadway Construction Projects

PROJECT NAME / PROJECT LIMITS	URBAN / RURAL	DESCRIPTION	COMPLETED YR/STATUS	Length (Feet)	LENGTH (MILES)	Service Volume Capacity			NEW LANES	LANE MILES	DESIGN/ CEI COST	ROW COST	CONST. COST	TOTAL COST
						Current	Future	Added Cap.						
Old Highway 441 / Heim Road (3 Lane)														
From/To: Eudora Road to 11th Avenue		2U to 3U	Aug-96	3740	0.71	15600	16380	780	1	0.7083	\$ 56,907	\$0	\$ 379,378	\$ 436,285
Project: Bloxam Avenue (Clermont) Extension														
From/To: Pitt Street to Grand Highway		0-2U	Jan-95	2700	0.51	0	15600	15600	2	1.0227	\$ 39,878	\$0	\$ 462,084	\$ 501,962
Total										17.18	\$1,269,806	\$0	\$9,548,961	\$10,818,767

Summary Statistics of County Historical Project Costs in Lake County

Vehicle Miles of Capacity Added	122,388
Total Cost:	\$10,818,767
Average Cost of One Vehicle Mile of Added Capacity	\$88.40
Total Lane Miles of Added Capacity:	17.18
Average Capacity Added per Lane Mile	7,124
Average Cost Per Lane Mile for Right of Way	\$ 0
Average Cost Per Lane Mile for Design, CEI, and Construction	\$ 629,705
Average Cost Per Lane Mile of Improvement	\$ 629,705
Right of Way Cost Percent of Construction Cost	0%

Notes:

- (1) Where Design and CEI Cost Unavailable, 15% was used based on County Staff estimate.
- (2) U = Undivided; note 3U means two travel lanes with a continuous turn lane ; D = Divided, with turn lanes
- (3) Service volume capacities from 1998 FDOT Level of Service Handbook

Table 3-2 Lake County Historical FDOT Roadway Construction Projects

PROJECT NAME / PROJECT LIMITS	URBAN / RURAL	DESCRIPTION	COMPLETED YR/STATUS	Length (Feet)	LENGTH (MILES)	Service Volume Capacity			NEW LANES	LANE MILES	DESIGN/ CEI COST	ROW COST	CONST. COST	TOTAL COST
						Current	Future	Added Cap.						
Project: SR 530/US 92														
From/To: SR 25/US 27 to Orange Co. Line		4D - 6D	Dec-99	5333	1.01	31,500	47,300	15,800	2	2.02	\$ 527,000	\$ 1,624,000	\$ 1,569,000	\$ 3,720,000
Project: SR 19														
From/To: CR 561 to SR 500/US 441		2U - 4D	Dec-00	10190	1.93	15,600	32,800	17,200	2	3.86	\$ 2,073,000	\$ 4,875,000	\$ 8,182,000	\$ 15,130,000
Project: SR 44														
From/To: Sumter Co. Line to CR 468		2U - 4D	May-01	11616	2.20	23,300	57,000	33,700	2	4.4	\$ 431,000	\$ 808,000	\$ 7,820,000	\$ 9,059,000
Total										10.28	\$3,031,000	\$7,307,000	\$17,571,000	\$27,909,000

Summary Statistics of FDOT Historical Project Costs in Lake County

Vehicle Miles of Capacity Added	123,294
Total Cost:	\$27,909,000
Average Cost of One Vehicle Mile of Added Capacity	\$226
Total Lane Miles of Added Capacity:	10.28
Average Capacity Added per Lane Mile	11,994
Average Cost Per Lane Mile for Right of Way	\$ 710,798
Average Cost Per Lane Mile for Design, CEI, and Construction	\$ 2,004,086
Average Cost Per Lane Mile of Improvement	\$ 2,714,883
Right of Way Cost Percent of Construction Cost	42%

Notes:

- 1) District 5 FDOT Historical Construction Costs, 2001
- (2) U = Undivided; note 3U means two travel lanes with a continuous turn lane ; D = Divided, with turn lanes
- (3) Service volume capacities from 1998 FDOT Level of Service Handbook

Planned Project Costs

Information on roadway improvements planned in Lake County for the period 2001 –2006 was provided to the Consultant by County staff. This information is presented in Table 3-3, which summarizes Lake County and FDOT roadway capacity planned improvement projects expected to be built over the next 5 years (2001-2006). The information for State road projects was extracted from FDOT's Adopted 2001-2005 and Tentative 2002-2006 Work Programs. It should be noted that only capacity expansion projects are included in Table 3-3 and that no maintenance projects are included in the calculation of the impact fee cost component. This table highlights the facility, from and to termini, impact fee district, existing number of lanes, future number of lanes, length of the facility, current and future service volumes and added capacity, the vehicle miles of added capacity and the estimated costs of the planned improvements.

Long range planning projects from the year 2006 to 2020 were reviewed, but these cost estimates were 5 years old and determined to be out of date. Therefore, for purposes of developing the cost component of the impact fee, only the projects contained in the 5 year plans of the County and FDOT were considered in this analysis. It is further recommended that the County update all future planned project cost estimates based on the unit costs developed in this section.

Consultant and County staff met on multiple occasions to review the cost components for the County roads. Based on their review, some project costs related to design, CEI and construction were updated. Due to the lack of information on right of way costs, the County authorized an independent review of current and historical right of way costs. Stricklen Appraisal Services, P.A., conducted a Market Value Study for Right of Way Costs in Lake County, April 2001. This study researched land sales recorded between 1996 and 2001, and other related property sales data in Lake County to develop average right of way costs per square foot. These unit values of right of way costs do not account for the "condemnation factor" that is normally associated with right of way acquisitions. This was done to arrive at a conservative estimate of right of way costs in Lake county. Including the "condemnation factor" in the market analysis would add significantly to the right of way costs.

Table 3-3: Lake County and FDOT TIP (2001-2006) Capacity Improvement Projects

Project Name / Project Limits	Description	Length (Miles)	New Lanes	Lane Miles	Service Volume Capacity			Veh. Miles of Cap. Added	Design/ CEI Cost	ROW Cost	Construction Cost	Total Cost
					Current	Future	Added Cap.					
COUNTY PROJECTS FROM 2001-2005 TRANSPORTATION CONSTRUCTION PROGRAM (CAPACITY-ADDED PROJECTS ONLY)												
Project: Huffstettler Drive - Phase II												
From/To: US-441 to David Walker Drive	0-2U	0.75	2	1.50	0	15,600	15,600	11,668	\$ 130,500	\$ 580,668	\$ 870,000	\$ 1,581,168
From/To: Lake Eustis Drive to Huffstettler Drive	0-2U	0.50	2	0.99	0	15,600	15,600	7,756	\$ 59,250	\$ 285,863	\$ 395,000	\$ 740,113
Project: C-44												
From/To: Grand Island Shores Road to C-452	2U to 3U	0.79	1	0.79	15600	16,380	780	615	\$ 53,700	\$ 12,480	\$ 358,000	\$ 424,180
Project: Round Lake Road Extension												
From/To: Wolfbranch Road to SR-44	0-2U	2.50	2	5.00	0	13,600	13,600	34,000	\$ 114,000	\$ 264,000	\$ 760,000	\$ 1,138,000
Project: Alfred Street												
From/To: SR-19 To Sinclair Ave.	2U to 3U	0.36	1	0.36	16600	17,430	830	299	\$ 42,750	\$ 165,474	\$ 285,000	\$ 493,224
Project: Tavares Western Collector												
From/To: Woodlea Road to Dead River Road	0-2U	0.76	2	1.52	0	15,600	15,600	11,818	\$ 90,000	\$ 290,400	\$ 600,000	\$ 980,400
Project: C-44B												
From/To: US-441 to SR-44	2U to 5U	2.08	3	6.25	15600	32,800	17,200	35,833	\$ 668,700	\$ 2,181,168	\$ 4,458,000	\$ 7,307,868
Project: Orange Avenue (SR-44)												
From/To: Haselton Street to C-439	2U to 5U	2.20	3	6.60	15600	32,800	17,200	37,840	\$ 329,057	\$ 638,880	\$ 2,193,714	\$ 3,161,651
Project: Orange Avenue (SR-44)												
From/To: Haselton Street to C-439	2U to 5U	2.00	3	6.00	15600	32,800	17,200	34,400	\$ 299,143	\$ 4,752,000	\$ 1,994,286	\$ 7,045,429
Project: Kurt Street												
From/To: US-441 to Lakeview Avenue	2U to 3U	1.29	3	3.86	15600	16,380	780	1,005	\$ 107,100	\$ 476,250	\$ 714,000	\$ 1,297,350
Project: Marion County Road Extension												
From/To: Marion County Road to Marion County Line	0-2U	0.53	2	1.06	0	18,600	18,600	9,864	\$ 31,500	\$ 60,918	\$ 210,000	\$ 302,418
Project: Lake Ella Road Realignment												
From/To: April Hills Boulevard to US-27	0-2U	0.38	2	0.76	0	15,600	15,600	5,909	\$ 102,900	\$ 100,000	\$ 465,000	\$ 667,900
Project: C-460 East-West Connector Phase II												
From/To: Thomas Avenue to C-468	0-2U	0.83	2	1.67	0	15,600	15,600	13,000	\$ 60,000	\$ 132,000	\$ 400,000	\$ 592,000
Project: Hook Street Extension												
From/To: US-27 to Hancock Road	0-2D	2.10	2	4.20	0	16,380	16,380	34,398	\$ 124,740	\$ 1,496,880	\$ 831,600	\$ 2,453,220
Project: Hartwood Marsh												
From/To: US 27 to Orange County Line	0-4D	3.75	4	15.00	0	51,000	51,000	191,250	\$ 1,401,300	\$ 1,782,000	\$ 7,650,000	\$ 10,833,300

Table 3-3: Lake County and FDOT TIP (2001-2006) Capacity Improvement Projects

Project Name / Project Limits	Description	Length (Miles)	New Lanes	Lane Miles	Service Volume Capacity			Veh. Miles of Cap. Added	Design/ CEI Cost	ROW Cost	Construction Cost	Total Cost
					Current	Future	Added Cap.					
Project: Citrus Tower Boulevard												
From/To: Hook Street Extension to SR-50	0-2U	0.25	2	0.50	0	15,600	15,600	3,900	\$ 14,850	\$ 178,200	\$ 99,000	\$ 292,050
Project: South Clermont Connector												
From/To: Lake Susan Lodge Bridge to US-27	0-2U	2.00	2	4.00	0	15,600	15,600	31,200	\$ 405,000	\$ 1,053,888	\$ 2,700,000	\$ 4,158,888
Project: Hancock Road Extension North												
From/To: Skytop Subdivision to C-50	0-2U	1.27	2	2.54	0	15,600	15,600	19,795	\$ 16,500	\$ 167,500	\$ 110,000	\$ 294,000
Project: North Ridge Boulevard Extension												
From/To: North Ridge Boulevard to North Hancock Road	0-2U	0.59	2	1.17	0	15,600	15,600	9,159	\$ 67,080	\$ 62,000	\$ 447,200	\$ 576,280
Project: Oakley Seaver Road												
From/To: Citrus Tower Boulevard to North Hancock Road	0-2U	1.02	2	2.05	0	15,600	15,600	15,955	\$ 214,500	\$ 108,000	\$ 1,430,000	\$ 1,752,500
Project: Citrus Tower Boulevard												
From/To: Johns Lake Road to Hook Street	0-4D	1.14	2	2.27	0	32,800	32,800	37,273	\$ 264,000	\$ 360,000	\$ 1,760,000	\$ 2,384,000
Project: Minneola - Montverde Collector												
From/To: US-27 to Turkey Farms Road	0-2U	1.89	2	3.79	0	15,600	15,600	29,545	\$ 200,000	\$ 250,000	\$ 1,333,333	\$ 1,783,333
From/To: Turkey Farms Road to Blackstill Lake Road	0-2U	2.08	2	4.17	0	15,600	15,600	32,500	\$ 745,500	\$ 275,000	\$ 4,970,000	\$ 5,990,500
Project: North Connector												
From/To: C-50 to Minneola - Montverde Collector	0-2U	0.95	2	1.89	0	15,600	15,600	14,773	\$ 199,050	\$ 125,000	\$ 1,327,000	\$ 1,651,050

Table 3-3: Lake County and FDOT TIP (2001-2006) Capacity Improvement Projects

Project Name / Project Limits	Description	Length (Miles)	New Lanes	Lane Miles	Service Volume Capacity			Veh. Miles of Cap. Added	Design/ CEI Cost	ROW Cost	Construction Cost	Total Cost
					Current	Future	Added Cap.					
FDOT TIP PROJECTS 2001 to 2005												
Project: US 27												
From/To: SR 530 /Polk Co. Line to Boggy Marsh Rd	4D-6D	3.73	2	7.46	51000	76,500	25,500	95,064	\$ 1,861,000	\$ 20,119,000	\$ 10,575,000	\$ 32,555,000
Project: US 27												
From/To: SR 50 WB Ramp to S. Grassy Lake Rd	4D-6D	2.66	2	5.32	32800	49,200	16,400	43,640	\$ 2,361,000	\$ 3,963,000	\$ 20,279,000	\$ 26,603,000
Project: US 441												
From/To: Lake Eustis Dr to CR 44B	4D-6D	4.85	2	9.69	35000	52,500	17,500	84,788	\$ 2,133,000	\$ 4,572,000	\$ 31,514,000	\$ 38,219,000
Project: US 441												
From/To: SR 44 Leesburg to College Rd	4D-6D	3.97	2	7.93	35000	52,500	17,500	69,388	\$ 760,000	\$ 6,591,000	\$ 15,643,000	\$ 22,994,000
Project: US 441												
From/To: College Rd to .2 Mi. W. of Lake Shore	4D-6D	3.80	2	7.60	35000	52,500	17,500	66,500	\$ 1,342,000	\$ 111,000	\$ 25,078,000	\$ 26,531,000
Project: US 441												
From/To: .2 Mi. W. of Lake Shore to Lake Eustis Dr	4D-6D	1.43	2	2.85	35000	52,500	17,500	24,955	\$ 713,000	\$ 14,635,000	\$ 11,594,000	\$ 26,942,000
Total All Roads		52.43	64.00	118.78	318,400	819,470	501,070	1,008,088	14,911,120	65,789,569	151,044,133	231,744,821
Total State Roads		20.43	12.00	40.85	223,800	335,700	111,900	384,334	9,170,000	49,991,000	114,683,000	173,844,000
Total County Roads		32.00	52.00	77.93	94,600	483,770	389,170	623,754	5,741,120	15,798,569	36,361,133	\$57,900,821

Notes:

- 1) Updated County Costs, May 2000
- 2) FDOT Work Program Adopted 2001-2005 and Tentative 2002 to 2006

The improvements listed in Table 3-3 are typical of the type of improvements expected to be built during the next 5 years. A total of 22 County roadway capacity improvements and 6 State roadway capacity improvements are programmed for Lake County. They represent those cost affordable improvements contained in the current Transportation Improvement Programs of the County and FDOT. The County road projects had a total cost of \$57.90 million and resulted in 77.90 lane miles of County roads being added to the transportation system. In addition, almost 40.90 lane miles of State roads would also be built at a cost of \$173.80 million. In all, a total of 118.80 lane miles is programmed to be built in Lake County from 2001-2006 at a total cost of \$231.70 million.

Interstate Travel

Because impact fees are not used to pay for improvements on the Interstate Highway System, the portion of the trip length occurring on the Interstate System is eliminated from the total trip length for each land use. This is accomplished by multiplying the impact fee demand component by the following calculation:

- (1 – the percent of vehicle miles of travel occurring on the Interstate Highway System)

For Lake County the interstate adjustment factor was estimated at 21 percent. This estimate was based on the Lake County Urbanized Area Model and represents the estimate of interstate vehicle miles of travel to the total vehicle miles of travel occurring on the Lake County transportation network. Thus, the demand component is adjusted by 79 percent. This adjustment ensures that the County will not overcharge new development on its impacts.

Cost Component Recommendations

Summary statistics associated with the construction of a County road, a State road, and “all roads” are described in Table 3-4. This table shows County planned roadway projects would be built at an average cost per lane mile of \$742,979. Based on the market value analysis of average cost per lane mile of right of way amounted to \$202,726, while the average cost per lane mile for design, CEI and construction totaled to \$540,253. This average cost per lane mile for design, CEI and construction is much lower than the historical cost of \$629,705 as documented in Table 3-1. On the other hand, an evaluation of State planned roadway projects in Table 3-4, shows that State roads would be built at an average cost of \$4,255,667. The average cost per lane mile of right of way amounted to \$1,223,770, while the average cost per lane mile for design, CEI and construction calculated to \$3,031,897. These average costs per lane mile for right of way, and design, CEI and construction are much higher than the respective historical costs of \$710,798 and \$2,004,086 as shown in Table 3-2.

Table 3-4 Lake County and FDOT TIP (2001-2006) Summary Statistics

The detailed analysis and evaluation of historical costs versus planned costs, reveals State historical costs to be more realistic and representative of the right of way, design and construction costs associated with planned roadway improvement projects in Lake County. Similarly, for County projects, the historical costs for road construction, design and CEI are recommended. Also, right of way costs for County road projects should be based on the Market Analysis referenced above. In order to appropriately weight the historical costs to the future County and State 20 year planned roadway capacity improvement projects, it is further recommended that the State and County historical costs be weighted by the ratio of future County road miles to future State road miles as shown in Table 3-5. This results in a weighted cost per lane mile of \$1,702,843, which is recommended as the average cost per lane mile to be used in the impact fee equation for all roads to be built in Lake County over the 20 year period from 2001-2020.

Table 3-5 Recommended Cost Component for Transportation Impact Fee

SECTION 4
UPDATE OF CAPITAL FUNDING OFFSET COMPONENT

Calculation of Offset Component

The offset side of the impact fee equation recognizes the non-impact fee revenues that new development generates which are used for roadway capacity expansion projects. For example, trips to and from new development will consume gasoline and therefore generate gasoline tax revenues. A portion of the gasoline tax revenue may be used to construct new roads or expand existing roads. Thus, new development will generate revenue that can be used to construct additional roadway capacity. Failure to recognize these offsets will result in the new development paying twice for the roads – once in the impact fee and again when that portion of other revenues generated by the development are used to construct new roads.

The scope of this review was to determine the portion of gasoline and sales taxes that government agencies use to construct new and expanded roads. This was determined by 1) finding the number of pennies per gallon that return to the community for non-Interstate, capital improvements for State, County, and City road improvements; and 2) computing the equivalent annual number of cents of gas tax for road projects funded with the Lake County Infrastructure Sales Tax during the next 15 years. According to the Local Government Financial Information Handbook, September 2000, the amount of revenue generated by one cent of gas tax in Lake County is \$903,043.

Table 4-1 provides the Gas Tax Offset Calculations for Lake County. As indicated in the table, Infrastructure Sales Tax projects total \$72,090,800 over the 15 year life of the tax. If this level were funded during the next 15 years, the average annual funding level would be \$4,806,053. Initial Infrastructure Sales Tax Revenues for construction of capacity related projects total only \$55,389,494 during this time period. Thus, not all the projects initially identified for funding by the Infrastructure Sales Tax can be funded given the projected allocation of revenues from the Infrastructure Sales Tax. However, in order to be conservative in calculating the gas tax offset for sales tax revenues, the total estimated cost of Infrastructure Sales Tax projects, \$72,090,800, will be used in the offset calculation. As indicated above, Lake County receives approximately \$903,043 for one cent of gasoline tax. Therefore, the equivalent gas tax to fund

Table 4-1	
Gas Tax Offset Calculation	
Based on Motor Fuel Only	
Revenue from one cent of gas tax	\$ 903,043
Sales Tax Program Funding 2003 to 2017 (number of Years)	\$ 15
County Roads - Total Sales Tax Funded Capacity Projects 2003 to 2017	\$ 72,090,800
Average Annual Funding County Roads with Sales Tax Revenue Source	\$ 4,806,053
Equivalent Average Annual Number of Cents of Gas Tax Based on Annual Sales Tax Funded County Projects	\$ 5.32
Current Capital Improvement Program Funding 2001 to 2020 (number of Years)	\$ 19
State Roads - Total 2001 to 2020 Non-Impact Fee Funded Projects	\$ 237,255,000
Average Annual Funding State Roads with Non-Impact Fee Revenue Sources	\$ 12,487,105
Average Annual Number of Cents of Gas Tax State Projects	\$ 13.828
Total Annual Number of Cents of Gas Tax	\$ 19.150

the \$72,090,080 in infrastructure sales tax projects over the next 15 years is 5.32 cents per gallon.

Similarly, state road projects funded with federal and state gas tax during the period from 2001 to 2020 (in the five year State Transportation Improvement Program and Lake County Long Range Transportation Plan) total \$237,255,000. This results in an average annual funding level of \$12,487,105. Therefore, the equivalent gas tax to fund the \$237,255,000 cost of improvements over the next 20 years is 13.80 cents per gallon.

The current Lake County offset component is based on the assumption that 24 percent of the 37.7 cents per gallon of gas tax is used for capacity expansion projects. This amounts to approximately 9.0 cents per gallon of gasoline. Thus, the new gas tax offset is significantly higher than the current gas tax offset. This is due to the new County Infrastructure Sales Tax and a higher level (than the current impact fee) of state and federal gas tax being used for road expansion and new road projects.

Present Value of the Gas Tax

The current Lake County Transportation Impact Fee Ordinance uses a 30 year period and a discount rate of six percent (6%) to calculate the present value of annually recurring gasoline tax revenues. It also assumes in its calculations that only 220 days in a year will be subject to these rates. To create a more conservative estimate of gas tax revenues, it is recommended that a 25 year period and a discount rate of five percent (5%) be used to calculate the present value of the annually recurring gasoline tax revenues. It is also recommended that the present value calculations be calculated for the full 365 days in the year. The five percent discount rate was selected because it more closely represents the inflationary cost of road projects and the cost of borrowing money to finance road programs.

Adjustment for Local Trip Length

The current impact fee equation trip lengths represent travel on the functionally classified road system. However, gas taxes are collected for travel on local roads, as well as the functionally classified roads. To account for the fact that gas taxes are collected on all roads, an adjustment factor of 0.5 miles was added to the trip lengths of each land use to calculate the impact fee gas tax credit. This change has the effect of increasing the impact fee credit.

Offset Component Recommendations

The following changes are being recommended to the offset component:

- ❑ The new gas tax credit was calculated at 19.10 cents per gallon as opposed to the current credit of 9.03 cents per gallon;
- ❑ The discount rate used for estimating present value was reduced from 6% to 5% to better reflect current economic conditions, including inflation rates and cost of borrowing money;
- ❑ The number of days in a year in the impact fee equation was increased from the current 220 days to 365 days because travel occurs on all days and gas is consumed on all days;
- ❑ The average miles per gallon has been decreased from 18.6 to 16.0 to reflect recent trends;

- The adjustment for travel on local roads that generate gas tax be 0.5 miles for each land use; and

- The number of years used to calculate the present worth of the gasoline tax credit was reduced from 30 years to 25 years.

SECTION 5

LOCAL TRIP CHARACTERISTICS STUDIES

In order to determine travel patterns within Lake County, the county elected to collect local trip characteristics data about several land uses. The land uses selected for local studies included: residential single family, fast food restaurants, and shopping centers. Specific land uses were selected for a number of reasons. First, the residential single family land use was selected because a significant majority of all building permits issued and corresponding revenues collected from the Transportation Impact Fee Program are a result of new single family home construction. Therefore, it is very beneficial to collect data concerning the local trip characteristics of the residential single family land use. The fast food land use was selected because the current fee being charged for fast food land uses is significantly lower than the corresponding fee of other transportation impact fee programs in the state of Florida. Lake County desired to obtain local information about the trip generating characteristics of fast food restaurants and to charge a fee representative of the demand placed on the transportation system by new fast food restaurants. Finally, the shopping center land use was selected because these land uses, while not significant in number, do generate a large amount of impact fee collections per site. Further, the county staff felt that the current fee structure for the shopping center land uses should be reviewed and updated based on local study data.

Local study data was collected at three residential and three fast food sites, along with two shopping center sites. Two types of study data were collected at each study site: 1)trip generation data, and 2)origin destination surveys. The trip generation data was collected through the use of machine traffic counts during the weekdays for a period of seventy-two consecutive hours or three days. Additionally, manual counts were collected periodically during the week to verify the accuracy of the machine traffic counts. Origin/destination survey data was collected at each study site. For the residential study sites, the data were collected through road side patron interviews. For non-residential study sites, the data was collected through on-site patron interviews. The interviews were generally conducted between the hours of 6:30 a.m. to 6:00 p.m. This time allowed for data to be collected for both work and non-work related type trips.

A statistical review of the reasonableness of the origins destination survey data was performed. This analysis is illustrated through a series of tables that follow. Finally, the results of the trip characteristic surveys are summarized through three tables. These tables provide information about the trip generation, trip length, and percent new trips for each of the three land uses previously referenced. Data resulting from the trip characteristic surveys is included in the subsequent sections of this report and is used in the development of the demand component of the transportation impact fee for the above referenced land uses.

Statistical Review Survey Data

One of the considerations in the collection of origin destination survey data is to collect survey samples to develop a reasonable level of confidence that the collected data reflects local travel conditions in Lake County. From a statistical sampling perspective, the goal of these studies is to collect enough survey samples to be 85% confident that the average trip length from the survey data was within a plus or minus 15% level of accuracy for each study site. This confidence level has been used in a collection of local trip characteristics data throughout a number of Florida communities.

Table 5-1, 5-2, and 5-3 present the review of the land use sample size for each of the sites surveyed at the three land uses. Each of these tables indicates the number of samples, coefficient of variation, and sample size requirement at both 85 and 90 percent level of confidence. Margins of error for each of these sample size requirements are provided at 10 and 15 percent. Review of the data presented in Tables 5-1, 5-2 and 5-3 indicate that enough samples were obtained at all eight of the study sites for the three previously mentioned land uses to obtain a confidence level at or above 85% confidence within a 15% margin of error. In fact, all sites surveyed actually met the sample size required for a 90% level of confidence within a 15% margin of error.

In summary, the results of the local trip characteristic studies in Lake County are reasonable from a statistical sampling perspective. Thus, the data collection will be used in the development of the demand component for the three land uses for which data was collected in Lake County.

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Table 5-1 Residential Land Use Sample Size Analysis

SITE NUMBER	NUMBER OF SAMPLES	COEFFICIENT OF VARIATION	SAMPLE SIZE REQUIREMENT AT 90% CONFIDENCE		SAMPLE SIZE REQUIREMENT AT 85% CONFIDENCE	
			10 % MARGIN OF ERROR	15 % MARGIN OF ERROR	10 % MARGIN OF ERROR	15 % MARGIN OF ERROR
1	231	1.25	426	189	326	145
2	211	1.17	372	165	285	127
3	166	0.91	226	100	173	77

NOTES:

1. Coefficient of Variation (C) is the standard deviation of the sample divided by the sample mean.
2. The Normal Distribution Z value statistic at 90% and 85% confidence level is 1.645 and 1.440, respectively.
3. The sample size requirement is calculated by the formula $N = ((C^2) * (Z^2)) / (E^2)$, where C is the coefficient of variation, Z is the Z value statistic and E is the margin of error. This formula is based on a methodology reported by Michael E. Smith in "Design of Small-Sample Home Interview Travel Surveys," Transportation research Board 701, 1979.
4. For the trip length analysis, all sites meet or exceed 90% confidence at plus or minus 15%.

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Table 5-2 Fast Food Land Use Sample Size Analysis

SITE NUMBER	NUMBER OF TRIP LENGTH SAMPLES	COEFFICIENT OF VARIATION	SAMPLE SIZE REQUIREMENT AT 90% CONFIDENCE		SAMPLE SIZE REQUIREMENT AT 85% CONFIDENCE	
			10 % MARGIN OF ERROR	15 % MARGIN OF ERROR	5 % MARGIN OF ERROR	10 % MARGIN OF ERROR
			1	376	1.10	327
2	171	0.93	236	105	942	181
3	188	1.01	278	123	1111	213
ALL	735	1.06	301	134	1205	231

NOTES:

1. Coefficient of Variation (C) is the standard deviation of the sample divided by the sample mean.
2. The Normal Distribution Z value statistic at 90% and 85% confidence level is 1.645 and 1.440, respectively.
3. The sample size requirement is calculated by the formula $N = ((C^2) * (Z^2)) / (E^2)$, where C is the coefficient of variation, Z is the Z value statistic and E is the margin of error. This formula is based on a methodology reported by Michael E. Smith in "Design of Small-Sample Home Interview Travel Surveys," Transportation research Board 701, 1979.
4. For the trip length analysis, all sites meet or exceed 90% confidence at plus or minus 15%. The scope of service requires an 85% confidence at plus or minus 15%. The accuracy of the data collected exceeds the scope of services requirement.

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Table 5-3 Shopping Center Land Use Sample Size Analysis

SITE NUMBER	NUMBER OF TRIP LENGTH SAMPLES	COEFFICIENT OF VARIATION	SAMPLE SIZE REQUIREMENT AT 90% CONFIDENCE		SAMPLE SIZE REQUIREMENT AT 85% CONFIDENCE	
			10 % MARGIN OF ERROR	15 % MARGIN OF ERROR	10 % MARGIN OF ERROR	15 % MARGIN OF ERROR
			1	246	0.95	246
2	444	1.43	555	247	555	247

NOTES:

1. Coefficient of Variation (C) is the standard deviation of the sample divided by the sample mean.
2. The Normal Distribution Z value statistic at 90% and 85% confidence level is 1.645 and 1.440, respectively.
3. The sample size requirement is calculated by the formula $N = ((C^2) * (Z^2)) / (E^2)$, where C is the coefficient of variation, Z is the Z value statistic and E is the margin of error. This formula is based on a methodology reported by Michael E. Smith in "Design of Small-Sample Home Interview Travel Surveys," Transportation research Board 701, 1979.
4. For the trip length analysis, all sites meet or exceed 90% confidence at plus or minus 15%.

Residential Trip Characteristic Study Results

A summary of the results from the Residential Trip Characteristic Studies is presented in Table 5-4. For each of the three study sites, Table 5-4 includes number of units, number of origin destination surveys, average daily trip generation of each site, unadjusted daily trip generation rate, occupancy level of each site, average daily trip generation rate, average trip length, and the vehicle miles of travel for each site which is the trip length times the trip generation rate. For the residential single family land use, the data in Table 5-4 indicates a weighted average trip generation rate of 8.5 trips per dwelling unit and a simple average rate of 8.4 trips per dwelling unit. It should be noted that the resulting weighted average trip generation rate for residential single family land uses in Lake County are below the Institute of Transportation Engineers trip generation publication for a residential single family land use of 9.57 trips per dwelling unit. However, the resulting range in trip generation for the study sites in Lake County as discussed above is well within the range of data collected by the Institute of Transportation Engineers and published in their trip generation document. Trip lengths for the study sites in Lake County ranged from 7.6 to 10.2 miles. The weighted average trip length is 8.6 miles and the simple average trip length is 8.7 miles. The resulting weighted average and range of trip lengths for the single family land use is reasonable when compared to the trip lengths of other local studies for the active adult land use and information contained in the Lake County transportation model. More specifically, the average adult land use had a trip length of 9.8 miles and the model based trip length from home to various uses was approximately 10 miles. Because the Institute of Transportation Engineers (ITE) uses a weighted average method for calculating trip generation rates, the use of the weighted average method is recommended in Lake County. Recommended trip characteristics for the residential single family land use for use in the Lake County Transportation Impact Fee are:

Trip rate of 8.5 trips per dwelling unit and trip length of 8.6 miles.

It should be noted that the percent new trips factor for residential land uses is 100 percent. This is because all trips are treated as primary trips with the trip length measured from and to the residential site to and to and from the next stop.

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Table 5-4 Summary of Residential Trip Characteristic Studies

SITE NUMBER	NUMBER OF UNITS	NUMBER OF GOOD SURVEYS	AVG. DAILY TRIP GENERATION	UNADJ DAILY TGR	OCCUPANCY LEVEL	AVG DAILY TGR	AVG TRIP LENGTH	VMT=TRIP LENGTH * TGR
1	52	231	478	9.2	92%	10.0	7.6	76.1
2	126	211	1032	8.2	96%	8.5	8.3	71.0
3	49	166	322	6.6	98%	6.7	10.2	68.6
Weighted Average					96%	8.5	8.6	72.6
Simple Average					95%	8.4	8.7	

NOTES:

- (1) Weighted average is computed by summing the multiplication of the computed variable by number of units for each site and then dividing by the total number of units.

Fast Food Land Use Trip Characteristic Study Results

A summary of the fast food land use trip characteristics data for the studies conducted in Lake County is presented in Table 5-5. For each site, Table 5-5 includes the square footage, number of trip length samples, number of origin destination surveys, average daily trip generation, average daily trip generation rate, average trip lengths, average percent new trips, and the vehicle miles of travel. The information included in Table 5-5 indicates a weighted average trip generation rate per thousand square feet for the three fast food sites of 596.1 and simple average trip generation rate at 647.6 per 1000 square feet. The Lake County trip generation rates were compared to the ITE Trip Generation scatter plots for fast food land uses. The results of this review indicate that the Lake County study Trip Generation rates are within the range of and consistent with the results of the ITE trip generation studies for the fast food restaurant land use. To provide a conservative trip generation rate for the fast food land use, it is recommended that Lake County use the ITE trip generation rate in the calculation of the transportation impact fee for this land use. The ITE trip generation rate is lower than the study rate found in Lake County from the local trip characteristics studies.

ITE Trip Generation does not include information about the trip length and percent new trips factors for fast food land uses. Therefore, the data in Lake County will be used to develop the trip length and percent new trips factors for the fast food land use. The weighted average trip length from the studies in Lake County is 3.4 and simple average trip length is 3.3. For percent new trips, the weighted average is 63.6 and the simple average is 64.4. Total vehicle miles of travel for the weighted average method is 1201.1 and for the simple average 1280.7. For purposes of consistency with the methods used by the ITE, the weighted average method is recommended for use in Lake County. These values as presented in Table 5-5 are 3.4 miles and 63.6 percent for the trip length and percent new trips factors, respectively.

In summary, the recommended trip characteristics for the fast food land use in the Lake County Transportation Impact Fee are:

Trip rate – 496.12 trips per 1,000 square feet; trip length – 3.4 miles; and percent new trips – 63.6 percent

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Table 5-5 Summary of Fast Food Land Use Trip Characteristics Studies

SITE NUMBER	SQUARE FOOTAGE	TRIP LENGTH SAMPLES	ORIGIN/ DESTINATION SURVEYS	AVG DLY TRIP GEN.	AVG DLY TRIP GEN RATE (TGR)	AVG TRIP LENGTH	AVG % NEW TRIPS (NT)	VMT=TRIP LENGTH * TGR * %NT
1	2160	376	252	2018	934.3	2.5	74.6%	1728.5
2	3237	171	182	2120	654.9	4.1	47.8%	1277.3
3	3800	188	137	1344	353.7	3.3	70.8%	836.4
WEIGHTED AVG BASED ON UNITS								
					596.1	3.4	63.6%	1201.1
SIMPLE AVERAGE								
					647.6	3.3	64.4%	1280.7

NOTES:

- (1) Weighted average is computed by summing the multiplication of the computed variable by number of units for each site and then dividing by the total number of units.
- (2) Percent New Trips is computed as one minus the site capture rate.

Shopping Center Trip Characteristic Results

A summary of the shopping center trip characteristics for the studies conducted in Lake County is presented in Table 5-6. The same information as previously discussed for Table 5-5 is also provided in Table 5-6. The information in this table indicates a weighted average trip generation rate for the shopping center sites of 83.6 per 1000 square feet and a simple average trip generation rate of 84.0 trips per 1000 square feet. Using the daily ITE Trip Generation equation for shopping centers, the study weighted average trip generation rate for the shopping center studied in Lake County is approximately 81.3 trips per 1000 square feet. As can be seen, the weighted average trip generation rate per 1000 square feet of 83.6 (based on the observed trip generation rates for the shopping center sites) compares closely to the weighted ITE Trip Generation shopping center equation rate of 81.3 trips per 1000 square feet (for the same size shopping centers studied in Lake County).

The Lake County study trip generation rates were compared to the ITE Trip Generation scatter plots for shopping center land uses. This comparison indicates that the Lake County study trip generation rates are consistent with the results of the ranges for similar studies in the ITE Trip Generation and as indicated on the scatter plot of studies. It is therefore recommended that Lake County utilize the ITE Trip Generation equation in the development of the rate structure for the shopping center land use transportation impact fee.

The weighted average trip length and simple average trip length for the Lake County studies is 3.9 miles. These trip lengths were compared with trip length information from other studies performed in the state of Florida. Given the size of the shopping center studies in Lake County, the trip length was significantly longer than the trip lengths observed from other Florida studies. In fact, when the trip lengths for the studies conducted in Lake County are compared to the trip length curve developed by Tindale-Oliver and Associates for other studies, the trip lengths in Lake County are over twice as long as the trip lengths from other Florida studies for the same size shopping centers. Given this fact, and the fact that the sample size for other Florida study shopping centers is significantly larger than the two sites studied in Lake County, the resulting trip length curve from the other Florida studies was used in conjunction with an adjustment factor to develop the trip lengths for the shopping center land uses. This adjustment factor is based on the relationship between the Florida studies residential single family trip lengths and the trip length calculated from the residential single family studies conducted in Lake County. In

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Table 5-6 Summary of Commercial Shopping Center Land Use Trip Characteristics Studies

SITE NUMBER	SQUARE FOOTAGE	TRIP LENGTH SAMPLES	ORIGIN/ DESTINATION SURVEYS	AVG DLY TRIP GEN.	UNADJ DAILY TGR	OCC. RATE	OCC. SQFT	AVG DAILY TGR	AVG TRIP LENGTH	AVG % NEW TRIPS (NT)	VMT=TRIP LENGTH * TGR * %NT
1	67799	246	177	6957	102.6	100.0%	67799	102.6	3.4	71.2%	244.8
2	72300	444	376	4623	63.9	97.9%	70800	65.3	4.5	59.0%	173.7
WEIGHTED AVG BASED ON UNITS					82.7	98.9%		83.6	3.9	64.9%	208.1
SIMPLE AVERAGE						99.0%		84.0	3.9	65.1%	

NOTES:

1. Adjusted Trip Generation Rate reflects consideration of occupancy factor of each site (Trip Generation divided by Occupancy factor).
2. Weighted average is computed by summing the multiplication of the computed variable by number of units for each site and then dividing by the total number of un

summary, the adjustment factor is 1.41, meaning that the trip lengths observed in Lake County were 141 percent of the trip lengths observed in the residential single family studies of other Florida counties. Therefore, the trip lengths from the Florida shopping center studies will be adjusted by an adjustment factor of 1.41 to reflect the longer trip lengths observed in Lake County.

For percent new trips, the results of the local studies indicate a weighted average percent new trips of 64.9 percent and a simple average of 65.1 percent. This information was blended with the percent new trips information from other Florida studies and the information contained in the ITE Trip Generation. The recommended percent new trips for each shopping center land use category is illustrated in Table 5-6. It should be noted that the weighted average trip generation rate for the shopping centers in Lake County compared very favorably to the shopping center percent new trips for similar size shopping centers in the Florida studies and ITE Trip Generation sample sets.

In summary, the trip characteristics recommended for the shopping center land use categories are illustrated in Table 5-7. This table illustrates the recommended trip generation rate for each shopping center land use category, the adjusted trip lengths for each of the shopping center land use categories based on the previously discussed adjustment factor and percent new trips.

Table 5-7 Recommended Shopping Center Land Use Trip Characteristics

ITE Code	Land Use Categories	Unit	Trip Rate	Trip Length	Percent New Trips
	<i>General Commercial</i>				
820	Under 50,000 GSF	1,000 sf	111.82	2.40	54%
820	50,000 to 200,000 GSF	1,000 sf	62.95	2.68	65%
820	200,001 to 600,000 GSF	1,000 sf	41.56	3.38	75%
820	Greater than 600,000 GSF	1,000 sf	32.45	4.23	82%

SECTION 6

UPDATE OF DEMAND COMPONENT AND LAND USE CLASSIFICATIONS

Review of Demand Component

This section reviews the demand component of the impact fee equation. More specifically, land uses, trip generation rates, trip lengths, and percent new trips are reviewed and discussed. Specific recommendations are made for each land use category.

Trip Generation Rates

The trip generation rates for land uses in the current Lake County ordinance were reviewed and evaluated. Appropriate rates were selected to replace current rates for several land use categories currently in the ordinance, while new rates were recommended for the newly added land use categories. The source of the Trip Generation Rates for the land uses included in the Lake County Impact Fee Ordinance was generally based on the ITE Trip Generation, 6th Edition. For residential single family and active adult land uses, local study data was used to estimate the trip generation rate.

Trip Length

Similar to the trip generation rates, the trip lengths in the current ordinance were reviewed and evaluated. This review and evaluation enabled the Consultant to recommend a new set of trip lengths for Lake County. Very little data is available from Institute of Transportation Engineers (ITE) as they relate to trip length and percent new trips. Tindale-Oliver and Associates is recognized nationally as the leader in the compilation and development of this information. As a result, many of the adopted trip lengths (and also for percent new trips) rely on information from Florida studies contained in Appendix D as compiled by Tindale-Oliver and Associates. .

Local studies conducted on residential land uses indicated that trip lengths were considerably longer than trip lengths observed in other Florida communities. This was also true for the studies conducted on fast food restaurants and shopping centers. This appears to be due to the geographic layout of Lake County, the numerous lakes in the county and the fact that there is no grid system throughout the county. Using the Florida studies data in Lake County would cause an under estimation of the trip lengths for the various land uses for which fees are charged. Therefore, an adjustment factor, as

previously discussed, of 1.41 was applied to the majority of the land uses contained in the fee schedule.

Percent New Trips

The percent new trips in the current ordinance was also reviewed and evaluated. This review and evaluation enabled the Consultant to recommend percent new trips by land use for Lake County. As previously indicated for trip length, little data is available from ITE or other sources as they relate to percent new trips. As a result, most of the recommendations for percent new trips rely on the database of Florida studies provided in Appendix D.

REVIEW OF LAND USE CATEGORIES

Land Use Categories and Units

Land Use categories and related units by which each land use is measured were reviewed. The following changes to land use categories are recommended to be made to the current Lake County Impact Fee Ordinance:

- ❑ Single Family tiering was changed from bedrooms to square footage;
- ❑ Mobile Home (on a single family lot) was included in the Single Family rate structure;
- ❑ A new category was added for a Mobile Home in a Mobile Home Park
- ❑ The Hotel/Motel category was broken out into two categories – hotel and motel with a unit of measure per room;
- ❑ The units of measure for a Golf Course was changed from site to holes;
- ❑ County Park was combined with General Recreation;
- ❑ The Amusement and Recreation Services category was broken out into separate land use categories for Amusement and Recreation Services, Bowling Center, Dance Studio, and Horse Training with units of measure of 1000 sf, 1000 sf and acres, respectively;
- ❑ Elementary / Junior High School was broken out into two categories, Elementary and Middle School;
- ❑ The units of measure for a hospital was changed from beds to per 1000 square feet;
- ❑ The two Convenience Market categories were combined into one category called a Convenience Market with Gas and with a unit of measure of per 1000 square feet and a second category of Convenience Market with Gas and Fast Food with a unit of measure of per 1000 square feet;

- A category for a Quick Lube was added with a unit of measure of per 1000 square feet;
- A category for a Pharmacy / Drugstore was added with a unit of measure of per 1000 square feet;

The above changes will result in a more equitable assessment of impact fees for the land uses contained in the fee schedule.

SECTION 7
REVIEW OF BENEFIT DISTRICTS

The purpose of this review is to determine if the number or geographic boundaries of the existing benefit districts should be changed from the existing six districts. The six existing districts are illustrated in Figure 7-1. These districts have remained unchanged since the establishment of the Lake County Transportation Impact Fee Program in 1985. The main reasons to consider changing or reducing the number of impact fee districts are as follows: First, reducing the number of impact fee districts reduces the number of impact fee district trust accounts and the time associated with the overall management and reporting on the impact fee program. Second, large impact fee districts create flexibility concerning the budgeting and expenditure of impact fee funds. Larger districts or districts where the revenue collections are relatively evenly distributed between the districts generally results in greater revenue collections per district each year and the ability to construct needed improvements sooner due to the availability of funds. Third, benefit districts can follow the boundaries of municipalities participating in countywide impact fee programs. Funds collected in impact fee districts that follow municipal boundaries are spent within the municipalities in which they are collected.

Historical and Projected Revenues and Project Costs

A review of historical and projected impact revenue collections and expenditures was completed. The results of this review are summarized in Table 7-1. This table illustrates the historical revenue collections and current balances, as well as future revenue projections and project costs. Historical collections from 1985 to 2001 total \$57.3 million. Of this amount, \$32.6 million or 57 percent of the total funds have been spent.

Future revenue projections for the next 20 years were developed for each impact fee district based on the average collections during the three year period from 1999 to 2001. The three year average impact fee collections total just under \$8.5 million. Of particular interest is that revenue collections the last two fiscal years total about \$19.2 million or about \$9.6 million per year. Review of population growth confirms a growth rate from 1998 to 2001 of just over 3.5 percent per year. This is significantly higher than the Bureau of Economic Business Research (BEBR) at the University of Florida projections for the period from 2000 to 2020 which indicate population growth in the 2 percent range.

**Table 7-1 - Impact Fee Revenues Vs. Project Costs
(X \$1,000)**

Impact Fee District¹	Historical Collections FY 84/85 to 00/01	Remaining Balance Available	Average Collected Last 3 Years	Projected Revenues Over 20 Years	Number of Projects²	Estimated Cost of 5 Year and LRTP Projects	Ratio of Projected Revenues to Costs
1	\$1,931	\$134	\$152	\$3,039	0	\$0	0%
2	\$13,073	\$2,945	\$1,438	\$28,752	19	\$125,953	23%
3	\$13,610	\$5,637	\$1,629	\$32,584	10	\$67,727	48%
4	\$3,751	\$853	\$388	\$7,755	2	\$7,262	107%
5	\$19,767	\$8,729	\$3,912	\$78,237	16	\$125,387	62%
6	\$5,137	\$2,328	\$931	\$18,613	0	\$0	0%
Total	\$57,268	\$20,626	\$8,449	\$168,979	47	\$326,329	52%

Notes:

- 1) Current Impact Fee Districts are defined in the Lake County Road Impact Fee Ordinance
- 2) Number of projects includes those projects from the 5 year County and FDOT programs, and Long Range Transportation Plan projects

Considering this upward trend, the resulting revenue projection indicates that nearly \$168 million could be collected during the next 20 years. This does not include the potential effect of possible rate increases. However, it is likely that the future growth rate will be lower than the last three years and corresponding impact fee revenues will also be lower. Thus, the effect of any initial rate increase in actual revenues collected may not be as significant as initially thought if based on the last three years, especially if the rate of growth slows down.

Projects included in the Cost Feasible Long Range Plan and current Transportation Improvement Program total \$326.3 million. Using this information, the percentage of projected impact fee revenues to the total cost of projects in each impact fee district was calculated. The resulting calculation ranges from 0 percent for Districts 1 and 6 to 107 percent for District 3. Districts 2, 4 and 5 have future project costs far exceeding projected revenues, even if rates are significantly increased. This indicates there could be potential issues with expending impact fee monies collected in districts 1, 3 and 6. However, the current ordinance allows for the expenditure of funds from adjacent districts if the proof of benefit is demonstrated and the Board of County Commissioners approves the request. While this could indicate the need to consolidate districts or change boundaries, discussions with involved cities through their participation in Technical Advisory Committee meetings indicate that the overall preference is to keep the current benefit districts as they are now configured.

Benefit District Recommendations

Given the possible expenditure of impact fee funds issue in Districts 1, 3 and 6, consideration was given to consolidating the 6 impact fee districts into 4 impact fee districts. Such a consolidation would combine districts 3 and 4 together and 5 and 6 together, resulting in four districts with future projects exceeding available projected revenues. Additionally, the boundary between districts 1 and 2 would be changed to run south along Ranch Road. However, while the trend today is to fewer benefit districts, the current district configuration serves the municipalities in Lake County well. As indicated from discussions by members of the Technical Advisory Committee, preference would be to leave the current district boundaries as they currently exist. With this request being considered and given the provision to expend funds between districts, it is recommended that the existing 6 benefit districts remain as currently established.

SECTION 8

DEVELOPMENT OF ADMINISTRATIVE PROCEDURES MANUAL

Review and Documentation of Existing Processes

Two meetings were held at the office of the Impact Fee Coordinator in Lake County in order to review and document the current processes relating to the administration of the Impact Fee Program. In addition to the Impact Fee Coordinator, representatives from Human Services and Economic Development participated in the discussion about existing processes and procedures, specifically as they relate to affordable housing waivers and industrial development waivers. The purpose of these meetings was to gather information on the current operations used in administering the County's Transportation Impact Fee Program. This information will be used to document existing processes and to develop an Administrative Procedures Manual.

The current Lake County Ordinance was reviewed to develop a list of questions and issues concerning the Administrative Processes used to guide and administer the Lake County Transportation Impact Fee Program. This list of issues was used to guide the discussions concerning existing processes and procedures. The discussion issues are summarized below.

- Impact Fee Waivers for Affordable Housing;
- Deferrals for Industrial Land Uses;
- Impact Fee Waivers for Daycare Centers;
- Monthly Activity Reports for Municipalities;
- Prepayment of Impact Fees;
- Prepayments of Impact Fees being Non-refundable;
- Impact Fee Refund Process;
- Credits for Change of Use;
- Capacity Reservation Fees;
- Land Use Category Determination;
- Handling of Temporary Buildings;
- Fee Schedule and Land Use Categories;
- Transferred Impact Fee Credits; and
- Alternative Impact Fee Calculations.

The above topics are summarized from the meeting minutes for each of the two meetings previously referenced. Appendix E provides copies of memorandums documenting both of these meetings. From these meetings, a series of flowcharts will be developed and incorporated into the Administrative Procedures Manual.

Administrative Procedures Manual Format

Discussions with the Impact Fee Coordinator occurred concerning the format and content of the Administrative Procedures Manual. The focus of the Administrative Procedures Manual is to document current processes and provide a reference for both the Impact Fee Coordinator and Development Applicant to follow in processing their development application with respect to the payment of the Transportation Impact Fee. Given that objective, the format of the Administrative Procedures Manual has been designed to follow the current sections in the Lake County code with respect to Impact Fees. This includes a general section concerning the Impact Fees as well as the specific section that deals with the road impact fee. It was further agreed that the manual would include an introduction and highlight the major sections of the land development regulations that require actions by County staff and applicants. The format of the Administrative Procedures Manual is to first provide an overview of the section of the ordinance and then follow this overview by a discussion of the actions required by staff and the development applicant in the administration of the ordinance. Further, when a section of the ordinance requires a form to be completed by County staff or the applicant, the form and the basic process flow of the form are discussed in the Administrative Procedures Manual “Staff/Applicant Actions” section. Sample forms will also be referenced in the various appendices as exhibits. Finally, specific approval actions by County staff are also noted in this section.

SECTION 9
TRANSPORTATION IMPACT FEE SCHEDULE AND ALTERNATIVES

The impact fee schedule for Lake County was developed using the updated demand component, trip characteristic variables and the new and adjusted cost and offset components described in the previous sections. It should be noted that the offset component was revised to include both the gas tax offset and an offset for the recently passed Lake County Infrastructure Sales Tax. The revised fee schedule is presented as Table 9-1, which also allows comparison of the resulting impact fee schedule to the current schedule. For example, the residential impact fee of \$3,453 per unit for the single family/mobile home on a single family lot with 1,501 to 2,500 square feet of living area represents an increase of 157 percent over the current fee of \$1,343. The changes in the impact fee rates for various land uses are due to the following:

- ❑ An increase in the cost component from approximately \$484,000 to \$1,702,000 per lane mile of construction. Note that the \$1,702,000 cost per lane mile of construction is based on the weighted historical costs to build roads (state costs \$2,714,884 and county costs \$832,431, as presented in Table 3-5) in Lake County.
- ❑ Significant changes to the demand component trip characteristics data (trip rate, trip length, and percent new trips), many of which significantly increased the amount of demand per unit of land use, thus increasing fees. These changes were due to the use of historical trip characteristics data compiled by the Consultant and more specifically, local trip characteristic studies conducted in Lake County.
- ❑ Correction of the past error in the offset calculation, which alone increases the impact fee by 26 percent for each land use.

Since completion of the Draft Impact Fee Report in May of 2001, the Lake County Impact Fee Evaluation and Review Committee (IFERC) has met on a number of occasions to discuss the Transportation Impact Fee. The last meeting occurred on November 15, 2001. At this meeting the Committee discussed and reviewed several alternative impact fee schedules. The Committee reached general agreement on the following items concerning the Transportation Impact Fee:

- ❑ The fee should be based on the historical county cost data and not include FDOT construction costs. The report recommends a county construction cost \$629,705 and a right of way cost of \$202,726, for a total cost of \$832,431 (recommended to the Committee as Alternative 4 during the November 15, 2001 meeting).

**Table 9-1
Lake County Transportation Impact Fee Schedule (100.0 Percent of Cost) including Sales Tax Credit
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$1,702,843	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.191	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 0.0%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Residential:													
210	Single Family / Mobile Home (On Single Family Lot) - Less than 1500 sf	du	6.38	8.60	9.10	100%	\$4,373	\$127	\$1,783	\$0	\$2,589	\$1,083	139%
210	Single Family / Mobile Home (On Single Family Lot) - 1,501 sf to 2,500 sf	du	8.50	8.60	9.10	100%	\$5,830	\$169	\$2,378	\$0	\$3,453	\$1,343	157%
210	Single Family / Mobile Home (On Single Family Lot) - Greater than 2,500 sf	du	10.03	8.60	9.10	100%	\$6,880	\$199	\$2,805	\$0	\$4,074	\$2,157	89%
N/A	Active Adult (Deed Restricted)	du	3.91	9.80	10.30	100%	\$3,056	\$88	\$1,238	\$0	\$1,818	\$1,104	65%
221	Multi-Family (1 or 2 Stories)	du	6.59	7.19	7.69	100%	\$3,779	\$111	\$1,558	\$0	\$2,221	\$1,142	95%
222	Multi-Family (3 & more Stories)	du	4.20	7.19	7.69	100%	\$2,408	\$70	\$993	\$0	\$1,416	\$728	94%
240	Mobile Home Park (Mobile Homes clustered in a Park)	du	4.81	6.06	6.56	100%	\$2,325	\$69	\$970	\$0	\$1,355	(1)	
252	ACLF	du	3.40	4.37	4.87	72%	\$853	\$26	\$366	\$0	\$487	\$572	-15%
Lodging:													
310	Hotel	room	8.23	8.88	9.38	66%	\$3,847	\$111	\$1,566	\$0	\$2,281	\$1,236	85%
320	Motel / Bed and Breakfast	room	5.63	6.06	6.56	77%	\$2,095	\$62	\$874	\$0	\$1,221	\$1,236	-1%
416	Campground / RV Park	space	3.90	6.06	6.56	77%	\$1,451	\$43	\$606	\$0	\$846	\$806	5%
Recreational:													
412	General Recreation / County Park	acres	2.28	6.40	6.90	90%	\$1,047	\$31	\$435	\$0	\$612	\$727	-16%
420	Marina	slip	2.96	8.04	8.54	94%	\$1,784	\$52	\$730	\$0	\$1,054	\$719	47%
430	Golf Course	holes	35.74	6.91	7.41	90%	\$17,727	\$520	\$7,326	\$0	\$10,401	(2)	
473	Amusement & Recreation Services	1,000 sf	134.30	6.91	7.41	94%	\$69,573	\$2,040	\$28,753	\$0	\$40,820	(2)	
492	Racquet Club/Health Spa	1,000 sf	17.14	6.91	7.41	94%	\$8,879	\$260	\$3,670	\$0	\$5,210	\$4,166	25%
494	Bowling Center	1,000 sf	33.33	6.91	7.41	92%	\$16,899	\$496	\$6,984	\$0	\$9,915	(2)	
N/A	Dance Studio	1,000 sf	17.14	6.91	7.41	94%	\$8,879	\$260	\$3,670	\$0	\$5,210	(2)	
N/A	Horse Training	acres	5.00	6.91	7.41	94%	\$2,590	\$76	\$1,070	\$0	\$1,520	(2)	
Institutional:													
520	School (Elementary)	student	1.02	7.40	7.90	80%	\$482	\$14	\$198	\$0	\$283	\$138	105%
522	Middle School	student	1.45	7.40	7.90	90%	\$770	\$22	\$317	\$0	\$453	\$138	228%
530	School (High)	student	1.79	7.40	7.90	90%	\$951	\$28	\$391	\$0	\$560	\$175	220%
550	School (College)	student	2.38	8.60	9.10	90%	\$1,469	\$43	\$599	\$0	\$870	\$225	287%
540	Junior College	student	1.54	8.60	9.10	90%	\$951	\$28	\$388	\$0	\$563	\$1,221	-54%
560	Church / Religious Organization	1,000 sf	9.11	5.50	6.00	90%	\$3,597	\$107	\$1,512	\$0	\$2,084	\$808	158%
565	Day Care Center	1,000 sf	79.26	2.82	3.32	73%	\$13,013	\$419	\$5,904	\$0	\$7,109	\$9,019	-21%
566	Cemetery	acres	4.73	8.00	8.50	95%	\$2,867	\$83	\$1,174	\$0	\$1,693	\$820	106%
590	Library	1,000 sf	54.00	4.60	5.10	85%	\$16,839	\$511	\$7,195	\$0	\$9,644	\$4,315	124%
610	Hospital	1,000 sf	16.78	6.40	6.90	77%	\$6,595	\$194	\$2,740	\$0	\$3,855	(2)	
620	Nursing Home	bed	2.61	3.67	4.17	89%	\$680	\$21	\$298	\$0	\$382	\$450	-15%
730	Government Office Building	1,000 sf	68.93	7.19	7.69	92%	\$36,365	\$1,064	\$14,989	\$0	\$21,375	\$523	3987%

**Table 9-1
Lake County Transportation Impact Fee Schedule (100.0 Percent of Cost) including Sales Tax Credit
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$1,702,843	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.191	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 0.0%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Office:													
710	Office under 10,000GSF	1,000 sf	22.64	7.19	7.69	92%	\$11,945	\$349	\$4,924	\$0	\$7,021	\$4,037	74%
710	Office 10,001 GSF to 30,000 GSF	1,000 sf	19.28	7.19	7.69	92%	\$10,171	\$297	\$4,192	\$0	\$5,978	\$4,037	48%
710	Office 30,001 GSF to 100,000 GSF	1,000 sf	14.67	7.19	7.69	92%	\$7,737	\$226	\$3,189	\$0	\$4,548	\$2,727	67%
710	Office 100,001 GSF to 400,000 GSF	1,000 sf	10.73	7.19	7.69	92%	\$5,661	\$166	\$2,333	\$0	\$3,327	\$1,945	71%
710	Office greater than 400,000 GSF	1,000 sf	8.76	7.19	7.69	92%	\$4,620	\$135	\$1,904	\$0	\$2,716	\$1,945	40%
715	Single Tenant Office Building	1,000 sf	11.57	7.19	7.69	92%	\$6,104	\$179	\$2,516	\$0	\$3,588	\$2,300	56%
720	Medical Office	1,000 sf	36.13	7.19	7.69	87%	\$18,025	\$527	\$7,430	\$0	\$10,595	\$7,011	51%
750	Office Park	1,000 sf	11.42	7.61	8.11	82%	\$5,684	\$166	\$2,334	\$0	\$3,349	\$2,344	43%
760	Research Center	1,000 sf	8.11	7.61	8.11	82%	\$4,036	\$118	\$1,658	\$0	\$2,378	\$1,580	51%
770	Business Park	1,000 sf	12.76	7.61	8.11	82%	\$6,350	\$185	\$2,608	\$0	\$3,742	\$2,949	27%
General Commercial:													
820	Under 50,000 GSF	1,000 sf	111.82	2.40	2.90	54%	\$9,824	\$382	\$5,382	\$0	\$4,442	\$941	372%
820	50,000 to 200,000 GSF	1,000 sf	62.95	2.68	3.18	65%	\$7,434	\$284	\$3,999	\$0	\$3,434	\$604	469%
820	200,001 to 600,000 GSF	1,000 sf	41.56	3.38	3.88	75%	\$7,142	\$264	\$3,717	\$0	\$3,425	\$915	274%
820	Greater than 600,000 GSF	1,000 sf	32.45	4.23	4.73	82%	\$7,630	\$274	\$3,868	\$0	\$3,761	\$2,519	49%
Retail / Services:													
444	Movie Theater w/ Matinee	screen	153.33	3.10	3.60	87%	\$32,981	\$1,047	\$14,761	\$0	\$18,220	\$27,952	-35%
812	Bulding Materials and Lumber Store	1,000 sf	30.60	8.74	9.24	74%	\$15,784	\$456	\$6,431	\$0	\$9,353	\$800	1069%
813	Discount Superstore (greater than 120,000 sf)	1,000 sf	46.96	3.10	3.60	73%	\$8,476	\$269	\$3,793	\$0	\$4,682	\$1,229	281%
814	Speciality Retail	1,000 sf	40.67	4.79	5.29	85%	\$11,225	\$399	\$5,621	\$0	\$5,605	\$1,064	427%
815	Discount Superstore (less or equal to 120,000 sf)	1,000 sf	56.63	3.10	3.60	73%	\$10,221	\$325	\$4,574	\$0	\$5,646	\$1,834	208%
816	Hardware / Paint Store	1,000 sf	51.29	8.74	9.24	74%	\$26,457	\$765	\$10,780	\$0	\$15,677	\$1,341	1069%
818	Wholesale Nursery	Acres	4.50	8.60	9.10	74%	\$2,284	\$66	\$931	\$0	\$1,353	\$10,670	-87%
831	Quality Restaurant	1,000 sf	89.95	4.37	4.87	77%	\$24,140	\$736	\$10,368	\$0	\$13,772	\$5,049	173%
832	High Turnover Restaurant	1,000 sf	130.34	4.23	4.73	72%	\$31,660	\$968	\$13,644	\$0	\$18,016	\$3,760	379%
834	Fast Food Restaurant/W drive Thru	1,000 sf	496.12	2.26	2.76	59%	\$52,760	\$1,762	\$24,832	\$0	\$27,928	\$1,827	1429%
836	Bar / Lounge / Drinking Place	1,000 sf	130.34	4.23	4.73	72%	\$31,660	\$968	\$13,644	\$0	\$18,016	\$284	6244%
837	Quick Lube	bays	40.00	4.65	5.15	72%	\$10,688	\$324	\$4,562	\$0	\$6,126	(3)	
840	Auto Repair	1,000 sf	37.60	5.08	5.58	72%	\$10,968	\$329	\$4,643	\$0	\$6,325	(3)	
841	New and Used Auto Sales	1,000 sf	37.50	6.63	7.13	78%	\$15,467	\$455	\$6,410	\$0	\$9,056	\$6,554	38%
844	Service Station	Fuel Position	168.56	2.04	2.54	23%	\$6,308	\$215	\$3,027	\$0	\$3,281	\$870	277%
847	Car Wash	1,000 sf	108.00	2.82	3.32	71%	\$17,246	\$555	\$7,825	\$0	\$9,421	(3)	
850	Supermarket	1,000 sf	111.51	2.96	3.46	54%	\$14,215	\$454	\$6,404	\$0	\$7,811	\$2,067	278%
853	Convenience Market w/gas	1,000 sf	845.60	2.26	2.76	29%	\$44,201	\$1,476	\$20,803	\$0	\$23,397	\$4,021	482%
881	Pharmacy/Drugstore	1,000 sf	88.16	2.96	3.46	54%	\$11,239	\$359	\$5,063	\$0	\$6,176	(3)	
890	Furniture Store	1,000 sf	5.06	8.60	9.10	54%	\$1,874	\$54	\$764	\$0	\$1,110	\$114	874%
911	Bank	1,000 sf	156.48	3.38	3.88	55%	\$23,200	\$728	\$10,264	\$0	\$12,936	\$8,636	50%
912	Bank w/Drive-Thru	1,000 sf	232.90	3.38	3.88	55%	\$34,531	\$1,084	\$15,277	\$0	\$19,254	\$8,636	123%
N/A	Convenience Mkt. w/gas, fast food and car wash	1,000 sf	984.60	3.67	4.17	32%	\$92,222	\$2,865	\$40,384	\$0	\$51,838	(3)	
N/A	Veterinary Clinic	1,000 sf	32.80	2.82	3.32	70%	\$5,164	\$166	\$2,343	\$0	\$2,821	(3)	

**Table 9-1
Lake County Transportation Impact Fee Schedule (100.0 Percent of Cost) including Sales Tax Credit
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$1,702,843	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.191	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 0.0%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Industrial:													
110	General Light Industrial	1,000 sf	6.97	11.14	11.64	92%	\$5,697	\$163	\$2,294	\$0	\$3,403	\$1,907	78%
120	General Heavy Industrial	1,000 sf	1.50	11.14	11.64	92%	\$1,226	\$35	\$494	\$0	\$732	\$410	79%
130	Industrial Park	1,000 sf	6.96	11.14	11.64	89%	\$5,504	\$157	\$2,216	\$0	\$3,287	\$1,430	130%
140	Manufacturing	1,000 sf	3.82	11.14	11.64	92%	\$3,122	\$89	\$1,257	\$0	\$1,865	\$1,054	77%
150	Warehouse	1,000 sf	4.96	11.14	11.64	92%	\$4,054	\$116	\$1,633	\$0	\$2,422	\$1,335	81%
151	Mini-Warehouse	1,000 sf	2.50	4.37	4.87	92%	\$802	\$24	\$344	\$0	\$457	\$713	-36%
152	High Cube Warehouse (4)	1,000 sf	1.20	15.90	16.40	92%	\$1,400	\$39	\$557	\$0	\$843	(3)	
N/A	Airport Hanger	1,000 sf	4.96	11.14	11.64	92%	\$4,054	\$116	\$1,633	\$0	\$2,422	(3)	
170	Utilities Building	1,000 sf	5.44	11.14	11.64	92%	\$4,447	\$127	\$1,791	\$0	\$2,656	\$216	1130%

Notes:

N/A - Does not have an ITE Land Use Code
(1) Mobile Homes on a single lot of record are included in the single family home categories; the Mobile Home Park is a new category for mobile homes clustered together where the land is typically rented to the mobile home owner.
(2) Different Unit of measurement between Current Impact Fee schedule and Revised Impact Fee Schedule
(3) New land use category, does not exist in Current Impact Fee Schedule
(4) Source: The Goodyear Tire & Rubber Co. Independent Impact Fee Study Supplemental Analysis, Griffey Engineering, Inc. 2001

Source: Tindale-Oliver and Associates, Inc. 2001

C:\Documents and Settings\lgwelstead\Desktop\Road Impact Fee[table9-1.xls]Detail Fee Schedule

- ❑ The fee should be adopted by July 1, 2002 with an effective date of October 1, 2002.
- ❑ Consideration should be given to adjusting the total cost annually. This could be done based on a 5 year rolling average of county costs or by applying a construction cost inflation index value.
- ❑ The ordinance should be reviewed for update every five years.

Based on recommendations of the IFERC, two additional alternatives are presented. Table 9-2 presents an updated fee schedule that is based only on the county construction costs as indicated above and the offset for the recently passed sales tax. This alternative is consistent with the IFERC recommendations and would result in a residential impact fee of \$2,188 per unit for the single family/mobile home on a single family lot with 1,501 to 2,500 square feet of living area. This fee would be an increase of 63 percent over the current fee of \$1,343.

Table 9-3 presents a fee schedule based on the recommended construction cost of \$1,702,000 and an across the board reduction for all land uses of 36.6 percent. This percentage was chosen because the resulting fee schedule approximates the fees in Table 9-2, while recognizing that the average cost of construction of all roads in Lake County is \$1,702,000 per lane mile. There are a number of reasons why it makes sense to adopt the impact fee schedule using the cost component of \$1,702,000 and an across the board discount. These include:

- ❑ The average cost of building roads in Lake County should be used in the impact fee equation regardless of whether the road being built is state or county. The cost to build a lane mile of road in Lake County is based on historical data that includes both state and county roads. The fee can be reduced by an across the board discount of a specified percentage via a policy decision by the Board of County Commissioners (BCC). However, using a construction cost that only includes County road costs ignores the fact that approximately 64 percent of the future vehicle miles of travel occurring in Lake County are projected to occur on the state highway system.
- ❑ Including state costs in the impact fee cost component gives the County greater flexibility in the expenditure of impact fee funds and places the County in a stronger position to continue the practice of spending impact fees on state road projects. If only County costs were included in the impact fee cost component, the County could be challenged if it wanted to spend impact fees on state road projects. As growth continues to occur, improvements to state roads will become more critical. A number of counties use impact fee funds on state projects to accelerate and leverage state projects that benefit their

**Table 9-2
Lake County Transportation Impact Fee Schedule (100.0 Percent of County Cost including Sales Tax Credit)
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$832,431	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.0532	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 0.0%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Residential:													
210	Single Family / Mobile Home (On Single Family Lot) - Less than 1500 sf	du	6.38	8.60	9.10	100%	\$2,138	\$35	\$496	\$0	\$1,641	\$1,083	52%
210	Single Family / Mobile Home (On Single Family Lot) - 1,501 sf to 2,500 sf	du	8.50	8.60	9.10	100%	\$2,850	\$47	\$662	\$0	\$2,188	\$1,343	63%
210	Single Family / Mobile Home (On Single Family Lot) - Greater than 2,500 sf	du	10.03	8.60	9.10	100%	\$3,363	\$55	\$781	\$0	\$2,582	\$2,157	20%
N/A	Active Adult (Deed Restricted)	du	3.91	9.80	10.30	100%	\$1,494	\$24	\$344	\$0	\$1,150	\$1,104	4%
221	Multi-Family (1 or 2 Stories)	du	6.59	7.19	7.69	100%	\$1,847	\$31	\$433	\$0	\$1,414	\$1,142	24%
222	Multi-Family (3 & more Stories)	du	4.20	7.19	7.69	100%	\$1,177	\$20	\$276	\$0	\$901	\$728	24%
240	Mobile Home Park (Mobile Homes clustered in a Park)	du	4.81	6.06	6.56	100%	\$1,136	\$19	\$270	\$0	\$867	(1)	
252	ACLF	du	3.40	4.37	4.87	72%	\$417	\$7	\$102	\$0	\$315	\$572	-45%
Lodging:													
310	Hotel	room	8.23	8.88	9.38	66%	\$1,881	\$31	\$436	\$0	\$1,445	\$1,236	17%
320	Motel / Bed and Breakfast	room	5.63	6.06	6.56	77%	\$1,024	\$17	\$243	\$0	\$781	\$1,236	-37%
416	Campground / RV Park	space	3.90	6.06	6.56	77%	\$710	\$12	\$168	\$0	\$541	\$806	-33%
Recreational:													
412	General Recreation / County Park	acres	2.28	6.40	6.90	90%	\$512	\$9	\$121	\$0	\$391	\$727	-46%
420	Marina	slip	2.96	8.04	8.54	94%	\$872	\$14	\$203	\$0	\$669	\$719	-7%
430	Golf Course	holes	35.74	6.91	7.41	90%	\$8,666	\$145	\$2,038	\$0	\$6,627	(2)	
473	Amusement & Recreation Services	1,000 sf	134.30	6.91	7.41	94%	\$34,011	\$568	\$8,000	\$0	\$26,010	(2)	
492	Racquet Club/Health Spa	1,000 sf	17.14	6.91	7.41	94%	\$4,341	\$72	\$1,021	\$0	\$3,320	\$4,166	-20%
494	Bowling Center	1,000 sf	33.33	6.91	7.41	92%	\$8,261	\$138	\$1,943	\$0	\$6,318	(2)	
N/A	Dance Studio	1,000 sf	17.14	6.91	7.41	94%	\$4,341	\$72	\$1,021	\$0	\$3,320	(2)	
N/A	Horse Training	acres	5.00	6.91	7.41	94%	\$1,266	\$21	\$298	\$0	\$968	(2)	
Institutional:													
520	School (Elementary)	student	1.02	7.40	7.90	80%	\$235	\$4	\$55	\$0	\$180	\$138	31%
522	Middle School	student	1.45	7.40	7.90	90%	\$377	\$6	\$88	\$0	\$288	\$138	109%
530	School (High)	student	1.79	7.40	7.90	90%	\$465	\$8	\$109	\$0	\$356	\$175	103%
550	School (College)	student	2.38	8.60	9.10	90%	\$718	\$12	\$167	\$0	\$552	\$225	145%
540	Junior College	student	1.54	8.60	9.10	90%	\$465	\$8	\$108	\$0	\$357	\$1,221	-71%
560	Church / Religious Organization	1,000 sf	9.11	5.50	6.00	90%	\$1,758	\$30	\$421	\$0	\$1,337	\$808	66%
565	Day Care Center	1,000 sf	79.26	2.82	3.32	73%	\$6,361	\$117	\$1,643	\$0	\$4,719	\$9,019	-48%
566	Cemetery	acres	4.73	8.00	8.50	95%	\$1,402	\$23	\$327	\$0	\$1,075	\$820	31%
590	Library	1,000 sf	54.00	4.60	5.10	85%	\$8,232	\$142	\$2,002	\$0	\$6,230	\$4,315	44%
610	Hospital	1,000 sf	16.78	6.40	6.90	77%	\$3,224	\$54	\$762	\$0	\$2,462	(2)	
620	Nursing Home	bed	2.61	3.67	4.17	89%	\$332	\$6	\$83	\$0	\$250	\$450	-45%
730	Government Office Building	1,000 sf	68.93	7.19	7.69	92%	\$17,777	\$296	\$4,171	\$0	\$13,606	\$523	2502%

**Table 9-2
Lake County Transportation Impact Fee Schedule (100.0 Percent of County Cost including Sales Tax Credit)
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$832,431	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.0532	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 0.0%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Office:													
710	Office under 10,000 GSF	1,000 sf	22.64	7.19	7.69	92%	\$5,839	\$97	\$1,370	\$0	\$4,469	\$4,037	11%
710	Office 10,001 GSF to 30,000 GSF	1,000 sf	19.28	7.19	7.69	92%	\$4,972	\$83	\$1,166	\$0	\$3,805	\$4,037	-6%
710	Office 30,001 GSF to 100,000 GSF	1,000 sf	14.67	7.19	7.69	92%	\$3,782	\$63	\$887	\$0	\$2,895	\$2,727	6%
710	Office 100,001 GSF to 400,000 GSF	1,000 sf	10.73	7.19	7.69	92%	\$2,767	\$46	\$649	\$0	\$2,118	\$1,945	9%
710	Office greater than 400,000 GSF	1,000 sf	8.76	7.19	7.69	92%	\$2,259	\$38	\$530	\$0	\$1,729	\$1,945	-11%
715	Single Tenant Office Building	1,000 sf	11.57	7.19	7.69	92%	\$2,984	\$50	\$700	\$0	\$2,284	\$2,300	-1%
720	Medical Office	1,000 sf	36.13	7.19	7.69	87%	\$8,811	\$147	\$2,067	\$0	\$6,744	\$7,011	-4%
750	Office Park	1,000 sf	11.42	7.61	8.11	82%	\$2,778	\$46	\$650	\$0	\$2,129	\$2,344	-9%
760	Research Center	1,000 sf	8.11	7.61	8.11	82%	\$1,973	\$33	\$461	\$0	\$1,512	\$1,580	-4%
770	Business Park	1,000 sf	12.76	7.61	8.11	82%	\$3,104	\$51	\$726	\$0	\$2,379	\$2,949	-19%
General Commercial:													
820	Under 50,000 GSF	1,000 sf	111.82	2.40	2.90	54%	\$4,802	\$106	\$1,498	\$0	\$3,305	\$941	251%
820	50,000 to 200,000 GSF	1,000 sf	62.95	2.68	3.18	65%	\$3,634	\$79	\$1,113	\$0	\$2,521	\$604	317%
820	200,001 to 600,000 GSF	1,000 sf	41.56	3.38	3.88	75%	\$3,491	\$73	\$1,034	\$0	\$2,457	\$915	169%
820	Greater than 600,000 GSF	1,000 sf	32.45	4.23	4.73	82%	\$3,730	\$76	\$1,076	\$0	\$2,653	\$2,519	5%
Retail / Services:													
444	Movie Theater w/ Matinee	screen	153.33	3.10	3.60	87%	\$16,123	\$291	\$4,107	\$0	\$12,016	\$27,952	-57%
812	Bulding Materials and Lumber Store	1,000 sf	30.60	8.74	9.24	74%	\$7,716	\$127	\$1,789	\$0	\$5,927	\$800	641%
813	Discount Superstore (greater than 120,000 sf)	1,000 sf	46.96	3.10	3.60	73%	\$4,143	\$75	\$1,055	\$0	\$3,088	\$1,229	151%
814	Speciality Retail	1,000 sf	40.67	4.79	5.29	85%	\$5,488	\$111	\$1,564	\$0	\$3,924	\$1,064	269%
815	Discount Superstore (less or equal to 120,000 sf)	1,000 sf	56.63	3.10	3.60	73%	\$4,996	\$90	\$1,273	\$0	\$3,724	\$1,834	103%
816	Hardware / Paint Store	1,000 sf	51.29	8.74	9.24	74%	\$12,933	\$213	\$2,999	\$0	\$9,934	\$1,341	641%
818	Wholesale Nursery	Acres	4.50	8.60	9.10	74%	\$1,117	\$18	\$259	\$0	\$857	\$10,670	-92%
831	Quality Restaurant	1,000 sf	89.95	4.37	4.87	77%	\$11,801	\$205	\$2,885	\$0	\$8,916	\$5,049	77%
832	High Turnover Restaurant	1,000 sf	130.34	4.23	4.73	72%	\$15,477	\$269	\$3,796	\$0	\$11,681	\$3,760	211%
834	Fast Food Restaurant/W drive Thru	1,000 sf	496.12	2.26	2.76	59%	\$25,792	\$490	\$6,909	\$0	\$18,882	\$1,827	934%
836	Bar / Lounge / Drinking Place	1,000 sf	130.34	4.23	4.73	72%	\$15,477	\$269	\$3,796	\$0	\$11,681	\$284	4013%
837	Quick Lube	bays	40.00	4.65	5.15	72%	\$5,225	\$90	\$1,269	\$0	\$3,955	(3)	
840	Auto Repair	1,000 sf	37.60	5.08	5.58	72%	\$5,362	\$92	\$1,292	\$0	\$4,070	(3)	
841	New and Used Auto Sales	1,000 sf	37.50	6.63	7.13	78%	\$7,561	\$127	\$1,784	\$0	\$5,777	\$6,554	-12%
844	Service Station	Fuel Position	168.56	2.04	2.54	23%	\$3,083	\$60	\$842	\$0	\$2,241	\$870	158%
847	Car Wash	1,000 sf	108.00	2.82	3.32	71%	\$8,431	\$154	\$2,177	\$0	\$6,253	(3)	
850	Supermarket	1,000 sf	111.51	2.96	3.46	54%	\$6,949	\$126	\$1,782	\$0	\$5,167	\$2,067	150%
853	Convenience Market w/gas	1,000 sf	845.60	2.26	2.76	29%	\$21,607	\$411	\$5,788	\$0	\$15,819	\$4,021	293%
881	Pharmacy/Drugstore	1,000 sf	88.16	2.96	3.46	54%	\$5,494	\$100	\$1,409	\$0	\$4,085	(3)	
890	Furniture Store	1,000 sf	5.06	8.60	9.10	54%	\$916	\$15	\$213	\$0	\$704	\$114	517%
911	Bank	1,000 sf	156.48	3.38	3.88	55%	\$11,341	\$203	\$2,856	\$0	\$8,486	\$8,636	-2%
912	Bank w/Drive-Thru	1,000 sf	232.90	3.38	3.88	55%	\$16,880	\$302	\$4,251	\$0	\$12,630	\$8,636	46%
N/A	Convenience Mkt. w/gas, fast food and car wash	1,000 sf	984.60	3.67	4.17	32%	\$45,082	\$797	\$11,237	\$0	\$33,846	(3)	
N/A	Veterinary Clinic	1,000 sf	32.80	2.82	3.32	70%	\$2,524	\$46	\$652	\$0	\$1,872	(3)	

**Table 9-2
Lake County Transportation Impact Fee Schedule (100.0 Percent of County Cost including Sales Tax Credit)
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$832,431	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.0532	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 0.0%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Industrial:													
110	General Light Industrial	1,000 sf	6.97	11.14	11.64	92%	\$2,785	\$45	\$638	\$0	\$2,147	\$1,907	13%
120	General Heavy Industrial	1,000 sf	1.50	11.14	11.64	92%	\$599	\$10	\$137	\$0	\$462	\$410	13%
130	Industrial Park	1,000 sf	6.96	11.14	11.64	89%	\$2,690	\$44	\$617	\$0	\$2,074	\$1,430	45%
140	Manufacturing	1,000 sf	3.82	11.14	11.64	92%	\$1,526	\$25	\$350	\$0	\$1,177	\$1,054	12%
150	Warehouse	1,000 sf	4.96	11.14	11.64	92%	\$1,982	\$32	\$454	\$0	\$1,528	\$1,335	14%
151	Mini-Warehouse	1,000 sf	2.50	4.37	4.87	92%	\$392	\$7	\$96	\$0	\$296	\$713	-58%
152	High Cube Warehouse (4)	1,000 sf	1.20	15.90	16.40	92%	\$684	\$11	\$155	\$0	\$530	(3)	
N/A	Airport Hanger	1,000 sf	4.96	11.14	11.64	92%	\$1,982	\$32	\$454	\$0	\$1,528	(3)	
170	Utilities Building	1,000 sf	5.44	11.14	11.64	92%	\$2,174	\$35	\$498	\$0	\$1,675	\$216	676%

Notes:

N/A - Does not have an ITE Land Use Code

(1) Mobile Homes on a single lot of record are included in the single family home categories; the Mobile Home Park is a new category for mobile homes clustered together where the land is typically rented to the mobile home owner.

(2) Different Unit of measurement between Current Impact Fee schedule and Revised Impact Fee Schedule

(3) New land use category, does not exist in Current Impact Fee Schedule

(4) Source: The Goodyear Tire & Rubber Co. Independent Impact Fee Study Supplemental Analysis, Griffey Engineering, Inc. 2001

Source: Tindale-Oliver and Associates, Inc. 2001

C:\Documents and Settings\lgwelstead\Desktop\Road Impact Fee[table9-2.xls]Detail Fee Schedule

**Table 9-3
Lake County Transportation Impact Fee Schedule (63.4 Percent of Cost including Sales Tax Credit)
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$1,702,843	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.191	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 36.6%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Residential:													
210	Single Family / Mobile Home (On Single Family Lot) - Less than 1500 sf	du	6.38	8.60	9.10	100%	\$4,373	\$127	\$1,783	\$948	\$1,642	\$1,083	52%
210	Single Family / Mobile Home (On Single Family Lot) - 1,501 sf to 2,500 sf	du	8.50	8.60	9.10	100%	\$5,830	\$169	\$2,378	\$1,264	\$2,189	\$1,343	63%
210	Single Family / Mobile Home (On Single Family Lot) - Greater than 2,500 sf	du	10.03	8.60	9.10	100%	\$6,880	\$199	\$2,805	\$1,491	\$2,583	\$2,157	20%
N/A	Active Adult (Deed Restricted)	du	3.91	9.80	10.30	100%	\$3,056	\$88	\$1,238	\$665	\$1,153	\$1,104	4%
221	Multi-Family (1 or 2 Stories)	du	6.59	7.19	7.69	100%	\$3,779	\$111	\$1,558	\$813	\$1,408	\$1,142	23%
222	Multi-Family (3 & more Stories)	du	4.20	7.19	7.69	100%	\$2,408	\$70	\$993	\$518	\$898	\$728	23%
240	Mobile Home Park (Mobile Homes clustered in a Park)	du	4.81	6.06	6.56	100%	\$2,325	\$69	\$970	\$496	\$859	(1)	
252	ACLF	du	3.40	4.37	4.87	72%	\$853	\$26	\$366	\$178	\$309	\$572	-46%
Lodging:													
310	Hotel	room	8.23	8.88	9.38	66%	\$3,847	\$111	\$1,566	\$835	\$1,446	\$1,236	17%
320	Hotel / Bed and Breakfast	room	5.63	6.06	6.56	77%	\$2,095	\$62	\$874	\$447	\$774	\$1,236	-37%
416	Campground / RV Park	space	3.90	6.06	6.56	77%	\$1,451	\$43	\$606	\$310	\$536	\$806	-33%
Recreational:													
412	General Recreation / County Park	acres	2.28	6.40	6.90	90%	\$1,047	\$31	\$435	\$224	\$388	\$727	-47%
420	Marina	slip	2.96	8.04	8.54	94%	\$1,784	\$52	\$730	\$386	\$668	\$719	-7%
430	Golf Course	holes	35.74	6.91	7.41	90%	\$17,727	\$520	\$7,326	\$3,807	\$6,594	(2)	
473	Amusement & Recreation Services	1,000 sf	134.30	6.91	7.41	94%	\$69,573	\$2,040	\$28,753	\$14,940	\$25,880	(2)	
492	Racquet Club/Health Spa	1,000 sf	17.14	6.91	7.41	94%	\$8,879	\$260	\$3,670	\$1,907	\$3,303	\$4,166	-21%
494	Bowling Center	1,000 sf	33.33	6.91	7.41	92%	\$16,899	\$496	\$6,984	\$3,629	\$6,286	(2)	
N/A	Dance Studio	1,000 sf	17.14	6.91	7.41	94%	\$8,879	\$260	\$3,670	\$1,907	\$3,303	(2)	
N/A	Horse Training	acres	5.00	6.91	7.41	94%	\$2,590	\$76	\$1,070	\$556	\$964	(2)	
Institutional:													
520	School (Elementary)	student	1.02	7.40	7.90	80%	\$482	\$14	\$198	\$104	\$180	\$138	30%
522	Middle School	student	1.45	7.40	7.90	90%	\$770	\$22	\$317	\$166	\$287	\$138	108%
530	School (High)	student	1.79	7.40	7.90	90%	\$951	\$28	\$391	\$205	\$355	\$175	103%
550	School (College)	student	2.38	8.60	9.10	90%	\$1,469	\$43	\$599	\$318	\$552	\$225	145%
540	Junior College	student	1.54	8.60	9.10	90%	\$951	\$28	\$388	\$206	\$357	\$1,221	-71%
560	Church / Religious Organization	1,000 sf	9.11	5.50	6.00	90%	\$3,597	\$107	\$1,512	\$763	\$1,322	\$808	64%
565	Day Care Center	1,000 sf	79.26	2.82	3.32	73%	\$13,013	\$419	\$5,904	\$2,602	\$4,507	\$9,019	-50%
566	Cemetery	acres	4.73	8.00	8.50	95%	\$2,867	\$83	\$1,174	\$620	\$1,073	\$820	31%
590	Library	1,000 sf	54.00	4.60	5.10	85%	\$16,839	\$511	\$7,195	\$3,530	\$6,114	\$4,315	42%
610	Hospital	1,000 sf	16.78	6.40	6.90	77%	\$6,595	\$194	\$2,740	\$1,411	\$2,444	(2)	
620	Nursing Home	bed	2.61	3.67	4.17	89%	\$680	\$21	\$298	\$140	\$242	\$450	-46%
730	Government Office Building	1,000 sf	68.93	7.19	7.69	92%	\$36,365	\$1,064	\$14,989	\$7,823	\$13,552	\$523	2491%

**Table 9-3
Lake County Transportation Impact Fee Schedule (63.4 Percent of Cost including Sales Tax Credit)
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$1,702,843	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.191	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 36.6%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Office:													
710	Office under 10,000 GSF	1,000 sf	22.64	7.19	7.69	92%	\$11,945	\$349	\$4,924	\$2,570	\$4,452	\$4,037	10%
710	Office 10,001 GSF to 30,000 GSF	1,000 sf	19.28	7.19	7.69	92%	\$10,171	\$297	\$4,192	\$2,188	\$3,790	\$4,037	-6%
710	Office 30,001 GSF to 100,000 GSF	1,000 sf	14.67	7.19	7.69	92%	\$7,737	\$226	\$3,189	\$1,665	\$2,883	\$2,727	6%
710	Office 100,001 GSF to 400,000 GSF	1,000 sf	10.73	7.19	7.69	92%	\$5,661	\$166	\$2,333	\$1,218	\$2,110	\$1,945	8%
710	Office greater than 400,000 GSF	1,000 sf	8.76	7.19	7.69	92%	\$4,620	\$135	\$1,904	\$994	\$1,722	\$1,945	-11%
715	Single Tenant Office Building	1,000 sf	11.57	7.19	7.69	92%	\$6,104	\$179	\$2,516	\$1,313	\$2,275	\$2,300	-1%
720	Medical Office	1,000 sf	36.13	7.19	7.69	87%	\$18,025	\$527	\$7,430	\$3,878	\$6,717	\$7,011	-4%
750	Office Park	1,000 sf	11.42	7.61	8.11	82%	\$5,684	\$166	\$2,334	\$1,226	\$2,123	\$2,344	-9%
760	Research Center	1,000 sf	8.11	7.61	8.11	82%	\$4,036	\$118	\$1,658	\$871	\$1,508	\$1,580	-5%
770	Business Park	1,000 sf	12.76	7.61	8.11	82%	\$6,350	\$185	\$2,608	\$1,370	\$2,373	\$2,949	-20%
General Commercial:													
820	Under 50,000 GSF	1,000 sf	111.82	2.40	2.90	54%	\$9,824	\$382	\$5,382	\$1,626	\$2,816	\$941	199%
820	50,000 to 200,000 GSF	1,000 sf	62.95	2.68	3.18	65%	\$7,434	\$284	\$3,999	\$1,257	\$2,177	\$604	260%
820	200,001 to 600,000 GSF	1,000 sf	41.56	3.38	3.88	75%	\$7,142	\$264	\$3,717	\$1,253	\$2,171	\$915	137%
820	Greater than 600,000 GSF	1,000 sf	32.45	4.23	4.73	82%	\$7,630	\$274	\$3,868	\$1,377	\$2,385	\$2,519	-5%
Retail / Services:													
444	Movie Theater w/ Matinee	screen	153.33	3.10	3.60	87%	\$32,981	\$1,047	\$14,761	\$6,669	\$11,552	\$27,952	-59%
812	Bulding Materials and Lumber Store	1,000 sf	30.60	8.74	9.24	74%	\$15,784	\$456	\$6,431	\$3,423	\$5,930	\$800	641%
813	Discount Superstore (greater than 120,000 sf)	1,000 sf	46.96	3.10	3.60	73%	\$8,476	\$269	\$3,793	\$1,714	\$2,969	\$1,229	142%
814	Speciality Retail	1,000 sf	40.67	4.79	5.29	85%	\$11,225	\$399	\$5,621	\$2,051	\$3,553	\$1,064	234%
815	Discount Superstore (less or equal to 120,000 sf)	1,000 sf	56.63	3.10	3.60	73%	\$10,221	\$325	\$4,574	\$2,067	\$3,580	\$1,834	95%
816	Hardware / Paint Store	1,000 sf	51.29	8.74	9.24	74%	\$26,457	\$765	\$10,780	\$5,738	\$9,939	\$1,341	641%
818	Wholesale Nursery	Acres	4.50	8.60	9.10	74%	\$2,284	\$66	\$931	\$495	\$858	\$10,670	-92%
831	Quality Restaurant	1,000 sf	89.95	4.37	4.87	77%	\$24,140	\$736	\$10,368	\$5,041	\$8,731	\$5,049	73%
832	High Turnover Restaurant	1,000 sf	130.34	4.23	4.73	72%	\$31,660	\$968	\$13,644	\$6,594	\$11,422	\$3,760	204%
834	Fast Food Restaurant/W drive Thru	1,000 sf	496.12	2.26	2.76	59%	\$52,760	\$1,762	\$24,832	\$10,222	\$17,706	\$1,827	869%
836	Bar / Lounge / Drinking Place	1,000 sf	130.34	4.23	4.73	72%	\$31,660	\$968	\$13,644	\$6,594	\$11,422	\$284	3922%
837	Quick Lube	bays	40.00	4.65	5.15	72%	\$10,688	\$324	\$4,562	\$2,242	\$3,884	(3)	
840	Auto Repair	1,000 sf	37.60	5.08	5.58	72%	\$10,968	\$329	\$4,643	\$2,315	\$4,010	(3)	
841	New and Used Auto Sales	1,000 sf	37.50	6.63	7.13	78%	\$15,467	\$455	\$6,410	\$3,315	\$5,742	\$6,554	-12%
844	Service Station	Fuel Position	168.56	2.04	2.54	23%	\$6,308	\$215	\$3,027	\$1,201	\$2,080	\$870	139%
847	Car Wash	1,000 sf	108.00	2.82	3.32	71%	\$17,246	\$555	\$7,825	\$3,448	\$5,973	(3)	
850	Supermarket	1,000 sf	111.51	2.96	3.46	54%	\$14,215	\$454	\$6,404	\$2,859	\$4,952	\$2,067	140%
853	Convenience Market w/gas	1,000 sf	845.60	2.26	2.76	29%	\$44,201	\$1,476	\$20,803	\$8,563	\$14,834	\$4,021	269%
881	Pharmacy/Drugstore	1,000 sf	88.16	2.96	3.46	54%	\$11,239	\$359	\$5,063	\$2,260	\$3,915	(3)	
890	Furniture Store	1,000 sf	5.06	8.60	9.10	54%	\$1,874	\$54	\$764	\$406	\$704	\$114	517%
911	Bank	1,000 sf	156.48	3.38	3.88	55%	\$23,200	\$728	\$10,264	\$4,735	\$8,202	\$8,636	-5%
912	Bank w/Drive-Thru	1,000 sf	232.90	3.38	3.88	55%	\$34,531	\$1,084	\$15,277	\$7,047	\$12,207	\$8,636	41%
N/A	Convenience Mkt. w/gas, fast food and car wash	1,000 sf	984.60	3.67	4.17	32%	\$92,222	\$2,865	\$40,384	\$18,973	\$32,865	(3)	
N/A	Veterinary Clinic	1,000 sf	32.80	2.82	3.32	70%	\$5,164	\$166	\$2,343	\$1,032	\$1,788	(3)	

**Table 9-3
Lake County Transportation Impact Fee Schedule (63.4 Percent of Cost including Sales Tax Credit)
as of 12-21-01**

Fee Schedule Assumptions:

Gasoline Tax		Unit Construction Cost: \$1,702,843	Local Trip Length: 0.5
\$ per gallon to capital:	\$0.191	Capacity per lane: 8,487	Interstate Mileage %: 20.5%
Facility life (years):	25	Fuel efficiency: 16.0	Across-the-Board Adjustment: 36.6%
Interest rate:	5.0%	Effective days per year: 365	

ITE Code	Land Use (A)	Unit (B)	Trip Rate (C)	Trip Length (D)	Total Trip Length (E)	Percent New Trips (F)	Total Impact Cost (G)	Annual Gas Tax (H)	Gas Tax Credit (I)	Across the Board Adjustment (J)	Net Impact Fee (K)	Current Fee (L)	Percent Difference (M)
Industrial:													
110	General Light Industrial	1,000 sf	6.97	11.14	11.64	92%	\$5,697	\$163	\$2,294	\$1,245	\$2,157	\$1,907	13%
120	General Heavy Industrial	1,000 sf	1.50	11.14	11.64	92%	\$1,226	\$35	\$494	\$268	\$464	\$410	13%
130	Industrial Park	1,000 sf	6.96	11.14	11.64	89%	\$5,504	\$157	\$2,216	\$1,203	\$2,084	\$1,430	46%
140	Manufacturing	1,000 sf	3.82	11.14	11.64	92%	\$3,122	\$89	\$1,257	\$683	\$1,182	\$1,054	12%
150	Warehouse	1,000 sf	4.96	11.14	11.64	92%	\$4,054	\$116	\$1,633	\$886	\$1,535	\$1,335	15%
151	Mini-Warehouse	1,000 sf	2.50	4.37	4.87	92%	\$802	\$24	\$344	\$167	\$290	\$713	-59%
152	High Cube Warehouse (4)	1,000 sf	1.20	15.90	16.40	92%	\$1,400	\$39	\$557	\$309	\$535	(3)	
N/A	Airport Hanger	1,000 sf	4.96	11.14	11.64	92%	\$4,054	\$116	\$1,633	\$886	\$1,535	(3)	
170	Utilities Building	1,000 sf	5.44	11.14	11.64	92%	\$4,447	\$127	\$1,791	\$972	\$1,684	\$216	680%

Notes:

N/A - Does not have an ITE Land Use Code

(1) Mobile Homes on a single lot of record are included in the single family home categories; the Mobile Home Park is a new category for mobile homes clustered together where the land is typically rented to the mobile home owner.

(2) Different Unit of measurement between Current Impact Fee schedule and Revised Impact Fee Schedule

(3) New land use category, does not exist in Current Impact Fee Schedule

(4) Source: The Goodyear Tire & Rubber Co. Independent Impact Fee Study Supplemental Analysis, Griffey Engineering, Inc. 2001

Source: Tindale-Oliver and Associates, Inc. 2001

C:\Documents and Settings\lgwelstead\Desktop\Road Impact Fee\table9-3.xls\Detail Fee Schedule

county. Further, the BCC ultimately controls the expenditure of impact fees on specific projects through adoption of the annual Capital Improvements Program.

- Using the average cost and discounting the impact fee recognizes the fact that the funds being collected are not sufficient to meet the cost of new growth and that other funding sources will be necessary to finance needed road improvements. Further, a discounted impact fee means that a developer impacting a deficient road could not simply request a pay and go solution to a concurrency issue and build his development because the amount he is paying in impact fees is not 100 percent of the true cost of needed improvements.

The BCC has the opportunity of phasing the new impact fees over time, similar to the current Lake County Transportation Impact Fee program which was phased in over a five year period. The BCC can also establish the initial fee schedule at an across the board reduction of the total cost, and then increase the fee a designated percentage each year for a specified number of years.