

Charlotte County Impact Fee Update Study

TECHNICAL REPORT



Prepared for:

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**Charlotte County
Impact Fee Update Study
Table of Contents**

| | |
|---|-----------|
| I. INTRODUCTION..... | 1 |
| II. PUBLIC BUILDINGS | 3 |
| Facility Inventory..... | 3 |
| Service Area and Population..... | 4 |
| Level-of-Service..... | 5 |
| Cost Component | 5 |
| Credit Component..... | 6 |
| Net Public Buildings Impact Cost | 8 |
| Calculated Public Buildings Impact Fee Schedule..... | 9 |
| Public Buildings Impact Fee Schedule Comparison | 12 |
| III. LIBRARIES..... | 14 |
| Facility Inventory..... | 14 |
| Service Area and Population..... | 17 |
| Level-of-Service..... | 17 |
| Cost Component | 19 |
| Credit Component..... | 20 |
| Net Library Facilities Impact Cost | 22 |
| Calculated Library Facilities Impact Fee Schedule | 22 |
| Library Facilities Impact Fee Schedule Comparison | 24 |
| IV. FIRE/EMERGENCY MEDICAL SERVICES | 26 |
| Facility Inventory..... | 26 |
| Service Area and Population..... | 31 |
| Level-of-Service..... | 32 |
| Cost Component | 33 |
| Credit Component..... | 35 |
| Net Fire/EMS Impact Cost..... | 37 |
| Calculated Fire/EMS Impact Fee Schedule | 38 |

| | |
|--|-----------|
| Fire/EMS Impact Fee Schedule Comparison..... | 38 |
| V. LAW ENFORCEMENT & CORRECTIONAL FACILITIES..... | 43 |
| Facility Inventory..... | 43 |
| Service Area and Population..... | 46 |
| Level-of-Service..... | 46 |
| Cost Component | 48 |
| Credit Component..... | 49 |
| Net Law Enforcement and Correctional Facilities Impact Cost | 52 |
| Calculated Law Enforcement and Correctional Facilities Impact Fee Schedule..... | 53 |
| Law Enforcement and Correctional Facilities Impact Fee Schedule Comparison | 53 |
| VI. PARKS & RECREATION FACILITIES | 57 |
| Inventory of Land and Recreation Facilities | 57 |
| Service Area and Population..... | 59 |
| Level-of-Service..... | 59 |
| Cost Component | 61 |
| Credit Component..... | 63 |
| Net Impact Cost per Resident | 67 |
| Calculated Parks & Recreation Impact Fee Schedule | 68 |
| Parks & Recreation Impact Fee Schedule Comparison..... | 72 |
| VII. INDEXING..... | 74 |
| Land Cost..... | 75 |
| FDOT Project Cost | 76 |
| Building Construction Cost..... | 77 |
| Equipment Cost..... | 77 |
| Application | 78 |

APPENDICES

Appendix A: Supplemental Population Information

Appendix B: Cost Component – Supplemental Information

Appendix C: Law Enforcement/Correctional/Public Buildings Inventory

I. Introduction

Charlotte County's implemented impact fees in six program areas to fund adequate capital facilities for expected growth. The County's Impact Fee Ordinance was most recently updated in 2009. Since 2009, annual indexing adjustments have been applied to the fee rates, and in July 2012, the County decided to implement a moratorium on impact fees for all program areas, with the exception of transportation. The moratorium is set to expire on October 1, 2014. Charlotte County has retained Tindale-Oliver & Associates, Inc. (TOA) to prepare an update study to reflect changes to the cost, credit, and demand components since 2009 for all impact fee program areas. The update of the transportation impact fee program was completed in September 2013. This report provides the impact fee calculations and updated fee schedules for the remaining five program areas. It should be noted that figures calculated in this study represent the technically defensible level of impact fees that the County could charge; however, the Board of County Commissioners may choose to discount the fees as a policy decision.

Following this introduction, this report provides the results of the fee analysis for the following program areas:

- Public Buildings
- Libraries
- Fire/Emergency Medical Services
- Law Enforcement & Correctional Facilities
- Parks & Recreation

The methodology used to update the County's impact fee program is a consumption-based impact fee methodology, which is used through Florida. This methodology was also used in preparing the 2009 technical report for Charlotte County and is the basis for the current adopted fees.

A consumption-based impact fee charges new growth the proportionate share of the cost of providing additional infrastructure available for use by new growth based upon the burden placed on services from each land use (demand). Cost estimates reflect the current value of capital assets for each program area (i.e., the cost to buy or build the same asset today). In addition, per legal requirements, a credit is subtracted from the total cost to account for future contributions of the new development toward any capacity expansion projects

through other revenue sources. Contributions used to calculate the credit component include estimates of future non-impact fee revenues generated by the new development that will be used toward capacity expansion projects. In other words, case law requires that the new development should not be charged twice for the same service. Finally, for impact fee calculations, level of service (LOS) is measured in terms of the net capital asset dollar value per resident. However, for planning and tracking purposes, it is typically attached to a unit measure (such as officers per population, fire/EMS stations per population, etc.).

The following sections provide an explanation of the data and calculations used to update fee schedules for each program. In addition, an administrative fee of 2.46% is added to the calculated fees following the practice used in the County's last technical study.

II. Public Buildings

Public buildings impact fees are used to fund the land purchases, capital construction & expansion of facilities, and capital equipment required to support the additional government service demand created by growth.

There are several major elements associated with the development of the public buildings impact fee. These include:

- Facility Inventory
- Service Area and Population
- Level-of-Service
- Cost Component
- Credit Component
- Net Public Buildings Impact Cost
- Calculated Public Buildings Impact Fee Schedule
- Public Buildings Impact Fee Schedule Comparison

Facility Inventory

The public facilities inventory includes facilities that are primarily for the provision of essential county services and do not include any of the buildings included in the calculation of other impact fees.

According to the information provided by Charlotte County, the County has approximately 745,000 square feet of general public facility space. This includes the square footage of both primary and support buildings. Support facilities are defined as trailers, facilities without air-conditioning, or facilities that are unlikely to be occupied by personnel.

Table II-1 shows a summary of the public buildings inventory and the current value of buildings and land. As presented, the inventory includes a total of 669,000 square feet of primary building space and 76,000 square feet of support space.

The building value of the facilities included in the inventory were estimated based on insurance values, estimates for future buildings, and cost information obtained from other

jurisdictions. This analysis resulted in an estimated cost of \$200 per square foot for primary buildings and \$75 per square foot for support buildings.

In addition to building value, land values were estimated for future land purchases. Land value was determined primarily through a review of the value of parcels where the current public buildings are located, as reported by the Charlotte County Property Appraiser, an analysis of vacant land sales and values of 0.5- to 15-acre lots in Charlotte County, and discussions with the County representatives. This analysis resulted in an average land value of \$100,000 per acre. Additional information is included in Appendix B.

**Table II-1
Summary of Public Buildings Inventory**

| Building Type | Land | Square Feet ⁽¹⁾ | Building Value per Square Foot ⁽²⁾ | Building and Land Value ⁽³⁾ |
|--|-----------|----------------------------|---|--|
| Primary Buildings | | 668,511 | \$200 | \$133,702,200 |
| Support Buildings | | 76,092 | \$75 | \$5,706,900 |
| Total | | 744,603 | - | \$139,409,100 |
| Total Acreage ⁽⁴⁾ | 106.32 | | | - |
| Land Value per Acre ⁽⁵⁾ | \$100,000 | | | \$10,632,000 |
| Total Building and Land Value⁽⁶⁾ | | | | \$150,041,100 |

(1) Source: Appendix C, Table C-1

(2) Building value (Item 3) divided by square feet (Item 1)

(3) Primary buildings estimated at \$200 per square foot. The average cost of support buildings is estimated at \$75 per square foot. Appendix B provides further detail.

(4) Source: Appendix C, Table C-2

(5) Source: Appendix B

(6) Sum of the total value (Item 3) for primary buildings, support buildings, and land

Service Area and Population

Charlotte County provides all residents, workers, and visitors the benefit of government services. As such, the service area was determined to be the entire county.

To be consistent with the County’s Comprehensive Plan, for purposes of this technical analysis, the weighted seasonal population is used in all population estimates and projections. As mentioned previously, weighted seasonal population projections used in the impact fee analysis reflect estimates provided by the Charlotte County Community Development Department for permanent and seasonal residents. In addition, public

buildings is one of the program areas where functional population is used to capture the presence of all people within the community (including residents, workers, and visitors) to arrive at a total estimate of effective population that needs to be served. A more detailed explanation of weighted and functional population estimates is provided in Appendix A.

Level-of-Service

Based on the information provided by the County, Charlotte County’s 2014 achieved level-of-service (LOS) is 3.71 square feet of primary facilities per weighted resident. Table IV-2 presents the calculation of the existing LOS as well as the calculation of the existing LOS per functional resident. As shown, the 2014 LOS is 3.99 square feet per functional resident.

**Table II-2
Current Level-of-Service**

| Component | Year 2014 | |
|--|---------------------|-----------------------|
| | Weighted Population | Functional Population |
| Population ⁽¹⁾ | 180,425 | 167,563 |
| Primary Building Square Footage ⁽²⁾ | 668,511 | 668,511 |
| Achieved LOS (Sq. Ft. per Resident) ⁽³⁾ | 3.71 | 3.99 |

(1) Source: Appendix A, Tables A-1 and A-8

(2) Source: Table II-1

(3) Total square footage (Item 2) divided by the countywide population (Item 1)

Cost Component

The cost component of the study evaluates the cost of capital items, including buildings and land. Table II-3 provides a summary of all capital costs, which amounts to \$225 per square foot of primary public buildings, and \$896 per functional resident.

**Table II-3
Total Public Buildings Impact Cost per Functional Resident**

| Cost Component | Figure | Percent of Total Value |
|---|-----------------|------------------------|
| Total Building Value ⁽¹⁾ | \$139,409,100 | 92.9% |
| Total Land Value ⁽²⁾ | \$10,632,000 | 7.1% |
| Total Building and Land Value ⁽³⁾ | \$150,041,100 | 100.0% |
| Primary Building Square Footage ⁽⁴⁾ | 668,511 | |
| Total Building and Land Value per Square Foot ⁽⁵⁾ | \$224.44 | |
| Current LOS - Bldg Sq Ft per Functional Resident ⁽⁶⁾ | 3.99 | |
| Total Impact Cost per Functional Resident⁽⁷⁾ | \$895.52 | |

(1) Source: Table II-1

(2) Source: Table II-1

(3) Sum of building value (Item 1) and land value (Item 2)

(4) Source: Table II-1

(5) Total building and land value (Item 3) divided by primary building square footage (Item 4)

(6) Source: Table II-2

(7) Building and land value per square foot (Item 5) multiplied by building square footage per functional resident (Item 6)

Credit Component

To avoid overcharging development for the public buildings impact fee, a review of the capital financing program for public buildings was conducted. The purpose of this review was to determine any potential revenue credits that should be considered for revenues generated by new development that could be used for capital facilities and land expansion for public buildings. To estimate an average annual non-impact fee expenditure, capital projects funded during the past five years and programmed for the next six years were reviewed. Historically, the County funded public buildings primarily with ad valorem and impact fee revenues. Based on this trend, an average credit of \$0.17 per resident is calculated as shown in Table II-4.

It is important to note one of revenues sources currently available to the County is the local government infrastructure surtax or local discretionary sales surtax, which is going to expire at the end of 2014. Historically, revenues from the sales tax were used for other program areas; however, if re-adopted in 2015, a portion of the revenues is expected to be allocated to public buildings capacity projects. Given this, another credit scenario is calculated, which results in an average revenue credit of \$25 per functional resident.

**Table II-4
Public Buildings Capital Expansion Project Funding⁽¹⁾**

| Description | FY 2009 to FY 2013 | FY 2014 | FY 2015 | FY 2016 | FY 2017 | FY 2018 | FY 2019 | Total |
|--|-----------------------|------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| Ad Valorem | | | | | | | | |
| Health and Human Services Building | \$311,557 | - | - | - | - | - | - | \$311,557 |
| Sales Tax | | | | | | | | |
| Family Services Center Ph. I | - | - | \$1,199,000 | \$1,199,000 | \$1,199,000 | \$1,199,000 | \$1,199,000 | \$5,995,000 |
| West County Annex Replacement/Expansion | - | - | \$689,000 | \$689,000 | \$689,000 | \$689,000 | \$689,000 | \$3,445,000 |
| Justice Center Expansion | - | - | \$7,220,362 | \$7,220,362 | \$7,220,362 | \$7,220,362 | \$7,220,364 | \$36,101,812 |
| Total (Ad Valorem & Sales Tax) | \$311,557 | \$0 | \$9,108,362 | \$9,108,362 | \$9,108,362 | \$9,108,362 | \$9,108,364 | \$45,853,369 |
| Total Public Buildings Expansion Expenditures per Year⁽²⁾ | | | | | | | | \$4,168,488 |
| Average Annual Functional Population⁽³⁾ | | | | | | | | 168,046 |
| Annual Public Buildings Expansion Expenditures per Resident⁽⁴⁾ | | | | | | | | \$24.81 |
| Total (Ad Valorem ONLY) | | | | | | | | |
| | \$311,557 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$311,557 |
| Total Public Buildings Expansion Expenditures per Year⁽²⁾ | | | | | | | | \$28,323 |
| Average Annual Functional Population⁽³⁾ | | | | | | | | 168,046 |
| Annual Public Buildings Expansion Expenditures per Resident⁽⁴⁾ | | | | | | | | \$0.17 |

(1) Source: Charlotte County

(2) Total public buildings expenditures divided by 11 years

(3) Source: Appendix A, Table A-10. Average annual population from 2009 to 2019.

(4) Public buildings expansion expenditures per year (Item 3) divided by the average annual functional population (Item 4)

It should be noted that the credit component does not include any capital renovation, maintenance, or operations expenses, as these types of expenditures cannot be funded with impact fee revenue.

Net Public Buildings Impact Cost

The net impact fee per functional resident is the difference between the Cost Component and the Credit Component. Table II-5 presents the calculation of the net public buildings facilities impact cost per functional resident.

The first section of Table II-5 identifies the total impact cost as \$896 per functional resident. The second section of the table identifies the capital expansion expenditure credits for the public buildings facilities impact fee. Due to the uncertainty of future sales tax revenues, two scenarios have been developed: one that accounts for potential sales tax revenue availability and one that excludes any future sales tax revenue contributions.

The net impact cost per functional resident (third section of the table) is the difference between the total impact cost per functional resident of \$896 and the total revenue credit of \$388 per functional resident for Scenario 1 (with sales tax revenues) and \$3 per functional resident for Scenario 2 (without sales tax revenues). The result is a net impact cost of \$508 per functional resident for Scenario 1 and \$893 per functional resident for Scenario 2.

**Table II-5
Net Public Building Impact Cost per Functional Resident**

| Impact Cost / Credit Element | With Sales Tax | | Without Sales Tax | |
|--|----------------|-----------------|-------------------|-----------------|
| | Impact Cost | Revenue Credits | Impact Cost | Revenue Credits |
| Impact Cost | | | | |
| Total Impact Cost per Functional Resident ⁽¹⁾ | \$895.52 | - | \$895.52 | - |
| Impact Credit | | | | |
| Avg Annual Capital Improvement Credit Amount per Func. Res. ⁽²⁾ | | \$24.81 | - | \$0.17 |
| Capitalization Rate | | 4.0% | - | 4.0% |
| Capitalization Period (in years) | | 25 | - | 25 |
| Capital improvement credit per Resident ⁽³⁾ | | \$387.58 | - | \$2.66 |
| Net Impact Cost | | | | |
| Net Impact Cost per Functional Resident ⁽⁴⁾ | \$507.94 | - | \$892.86 | - |

(1) Source: Table II-3

(2) Source: Table II-4

(3) Average annual capital improvement credit per functional resident (Item 2) with a capitalization rate of 4.0% for 25 years

(4) Total impact cost per functional resident (Item 1) less the total credit per functional resident (Item 3) for each scenario

Calculated Public Buildings Impact Fee Schedule

Based on the analysis conducted in this section, two public buildings impact fee schedules were developed for residential and non-residential land uses in Charlotte County.

Scenario 1:

Table II-6 presents the calculated impact fee schedule based on availability of sales tax revenues. This scenario estimates a higher credit and therefore a lower calculated impact fee.

Scenario 2:

Table II-7 presented the calculated impact fee schedule excluding future sales tax funding. This scenario estimates a lower credit and therefore a higher calculated impact fee.

**Table II-6
Calculated Public Buildings Impact Fee Schedule (Scenario 1)**

| ITE LUC | Land Use | Impact Unit | Functional Resident Coefficient ⁽¹⁾ | Calculated Impact Fee ⁽²⁾ | Administrative Fee @ 2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ | Current Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
|----------------------|--|--------------|--|--------------------------------------|---|---------------------------------|-----------------------------------|-------------------------------|
| RESIDENTIAL: | | | | | | | | |
| 210 | Single Family (Detached) | du | 1.42 | \$721.27 | \$17.74 | \$739 | \$378 | 95.5% |
| 220/230 | Multi-Family/Single Family Attached | du | 0.75 | \$380.96 | \$9.37 | \$390 | \$253 | 54.2% |
| 240 | Mobile Home | du | 0.77 | \$391.11 | \$9.62 | \$401 | \$267 | 50.2% |
| 253 | Congregate Care Facility | du | 0.83 | \$421.59 | \$10.37 | \$432 | n/a | n/a |
| LODGING: | | | | | | | | |
| 310 | Hotel | room | 0.55 | \$279.37 | \$6.87 | \$286 | \$291 | -1.7% |
| 320 | Motel | room | 0.51 | \$259.05 | \$6.37 | \$265 | \$291 | -8.9% |
| RECREATION: | | | | | | | | |
| 416 | RV Park | site | 0.50 | \$253.97 | \$6.25 | \$260 | n/a | n/a |
| 420 | Marina | boat berth | 0.19 | \$96.51 | \$2.37 | \$99 | n/a | n/a |
| 430 | Golf Course | hole | 1.08 | \$548.58 | \$13.50 | \$562 | n/a | n/a |
| 444 | Movie Theater w/Matinee | 1,000 sf | 5.98 | \$3,037.48 | \$74.72 | \$3,112 | \$2,230 | 39.6% |
| 492 | Health/Fitness Club | 1,000 sf | 3.09 | \$1,569.53 | \$38.61 | \$1,608 | n/a | n/a |
| INSTITUTIONS: | | | | | | | | |
| 520 | Elementary School (Private) | student | 0.06 | \$30.48 | \$0.75 | \$31 | n/a | n/a |
| 522 | Middle School (Private) | student | 0.07 | \$35.56 | \$0.87 | \$36 | n/a | n/a |
| 530 | High School (Private) | student | 0.08 | \$40.64 | \$1.00 | \$42 | n/a | n/a |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | 0.10 | \$50.79 | \$1.25 | \$52 | n/a | n/a |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | 0.07 | \$35.56 | \$0.87 | \$36 | n/a | n/a |
| 560 | Church | 1,000 sf | 0.51 | \$259.05 | \$6.37 | \$265 | \$143 | 85.3% |
| 565 | Day Care | 1,000 sf | 0.89 | \$452.07 | \$11.12 | \$463 | \$305 | 51.8% |
| 610 | Hospital | 1,000 sf | 1.37 | \$695.88 | \$17.12 | \$713 | \$355 | 100.8% |
| 620 | Nursing Home | 1,000 sf | 1.72 | \$873.66 | \$21.49 | \$895 | \$155 | 477.4% |
| OFFICE: | | | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | 1.19 | \$604.45 | \$14.87 | \$619 | \$238 | 160.1% |
| | General Office 100,001-200,000 sf | 1,000 sf | 1.01 | \$513.02 | \$12.62 | \$526 | \$214 | 145.8% |
| | General Office 200,001-400,000 sf | 1,000 sf | 0.85 | \$431.75 | \$10.62 | \$442 | \$209 | 111.5% |
| | General Office greater than 400,000 sf | 1,000 sf | 0.77 | \$391.11 | \$9.62 | \$401 | \$196 | 104.6% |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | 1.14 | \$579.05 | \$14.24 | \$593 | \$325 | 82.5% |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 1.74 | \$883.82 | \$21.74 | \$906 | \$325 | 178.8% |
| RETAIL: | | | | | | | | |
| 820 | Retail 100,000 sf gla or less | 1,000 sf gla | 2.11 | \$1,071.75 | \$26.37 | \$1,098 | \$262 | 319.1% |
| | Retail 100,001-200,000 sf gla | 1,000 sf gla | 2.12 | \$1,076.83 | \$26.49 | \$1,103 | \$366 | 201.4% |
| | Retail 200,001-400,000 sf gla | 1,000 sf gla | 2.34 | \$1,188.58 | \$29.24 | \$1,218 | \$494 | 146.6% |
| | Retail greater than 400,000 sf gla | 1,000 sf gla | 2.44 | \$1,239.37 | \$30.49 | \$1,270 | \$453 | 180.4% |
| 841 | New/Used Auto Sales | 1,000 sf | 1.47 | \$746.67 | \$18.37 | \$765 | \$621 | 23.2% |
| 849 | Tire Superstore | service bay | 1.34 | \$680.64 | \$16.74 | \$697 | n/a | n/a |
| 850 | Supermarket | 1,000 sf | 2.05 | \$1,041.28 | \$25.62 | \$1,067 | n/a | n/a |
| 851 | Convenience Market (24 hour) | 1,000 sf | 5.47 | \$2,778.43 | \$68.35 | \$2,847 | \$1,183 | 140.7% |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | 5.83 | \$2,961.29 | \$72.85 | \$3,034 | \$1,183 | 156.5% |
| 862 | Home Improvement Superstore | 1,000 sf | 1.81 | \$919.37 | \$22.62 | \$942 | n/a | n/a |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | 1.96 | \$995.56 | \$24.49 | \$1,020 | \$239 | 326.8% |
| 890 | Furniture Store | 1,000 sf | 0.23 | \$116.83 | \$2.87 | \$120 | n/a | n/a |
| 911 | Bank/Savings Walk-In | 1,000 sf | 2.23 | \$1,132.71 | \$27.86 | \$1,161 | \$468 | 148.1% |
| 912 | Bank/Savings Drive-In ⁽⁷⁾ | 1,000 sf | 2.28 | \$1,158.10 | \$28.49 | \$1,187 | \$515 | 130.5% |
| 931 | Quality Restaurant | 1,000 sf | 6.82 | \$3,464.15 | \$85.22 | \$3,549 | \$1,182 | 200.3% |
| 932 | High-Turnover Restaurant | 1,000 sf | 6.78 | \$3,443.83 | \$84.72 | \$3,529 | \$1,473 | 139.6% |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | 8.90 | \$4,520.67 | \$111.21 | \$4,632 | \$1,473 | 214.5% |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 5.80 | \$2,946.05 | \$72.47 | \$3,019 | \$540 | 459.1% |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | 1.91 | \$970.17 | \$23.87 | \$994 | \$93 | 968.8% |
| 947 | Self-Service Car Wash | service bay | 0.87 | \$441.91 | \$10.87 | \$453 | n/a | n/a |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | 7.15 | \$3,631.77 | \$89.34 | \$3,721 | \$1,183 | 214.5% |
| INDUSTRIAL: | | | | | | | | |
| 110 | General Light Industrial | 1,000 sf | 0.69 | \$350.48 | \$8.62 | \$359 | \$131 | 174.0% |
| 120 | General Heavy Industrial | 1,000 sf | 0.49 | \$248.89 | \$6.12 | \$255 | \$131 | 94.7% |
| 140 | Manufacturing | 1,000 sf | 0.50 | \$253.97 | \$6.25 | \$260 | \$131 | 98.5% |
| 150 | Warehousing | 1,000 sf | 0.28 | \$142.22 | \$3.50 | \$146 | \$68 | 114.7% |
| 151 | Mini-Warehouse | 1,000 sf | 0.06 | \$30.48 | \$0.75 | \$31 | \$26 | 19.2% |

- (1) Source: Appendix A, Table A-11 for residential and lodging land uses and Table A-13 for non-residential land uses
- (2) Calculated impact fee determined by multiplying the net impact cost per functional resident (Table II-5) by the functional resident coefficient (Item 1) for each land use
- (3) Calculated impact fee (Item 2) multiplied by 2.46% to determine the administrative fee
- (4) Sum of the calculated impact fee (Item 2) and the administrative fee (Item 3)
- (5) Source: Charlotte County Community Development Department; Includes a 2.46% administrative fee; fees are currently suspended
- (6) Percent change from the current adopted fee rate (Item 5) to the total impact fee (Item 4)
- (7) The current adopted fee rate (Item 5) is charged "per lane"

**Table II-7
Calculated Public Buildings Impact Fee Schedule (Scenario 2)**

| ITE LUC | Land Use | Impact Unit | Functional Resident Coefficient ⁽¹⁾ | Calculated Impact Fee ⁽²⁾ | Administrative Fee @ 2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ | Current Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
|----------------------|--|--------------|--|--------------------------------------|---|---------------------------------|-----------------------------------|-------------------------------|
| RESIDENTIAL: | | | | | | | | |
| 210 | Single Family (Detached) | du | 1.42 | \$1,267.86 | \$31.19 | \$1,299 | \$378 | 243.7% |
| 220/230 | Multi-Family/Single Family Attached | du | 0.75 | \$669.65 | \$16.47 | \$686 | \$253 | 171.1% |
| 240 | Mobile Home | du | 0.77 | \$687.50 | \$16.91 | \$704 | \$267 | 163.7% |
| 253 | Congregate Care Facility | du | 0.83 | \$741.07 | \$18.23 | \$759 | n/a | n/a |
| LODGING: | | | | | | | | |
| 310 | Hotel | room | 0.55 | \$491.07 | \$12.08 | \$503 | \$291 | 72.9% |
| 320 | Motel | room | 0.51 | \$455.36 | \$11.20 | \$467 | \$291 | 60.5% |
| RECREATION: | | | | | | | | |
| 416 | RV Park | site | 0.50 | \$446.43 | \$10.98 | \$457 | n/a | n/a |
| 420 | Marina | boat berth | 0.19 | \$169.64 | \$4.17 | \$174 | n/a | n/a |
| 430 | Golf Course | hole | 1.08 | \$964.29 | \$23.72 | \$988 | n/a | n/a |
| 444 | Movie Theater w/Matinee | 1,000 sf | 5.98 | \$5,339.30 | \$131.35 | \$5,471 | \$2,230 | 145.3% |
| 492 | Health/Fitness Club | 1,000 sf | 3.09 | \$2,758.94 | \$67.87 | \$2,827 | n/a | n/a |
| INSTITUTIONS: | | | | | | | | |
| 520 | Elementary School (Private) | student | 0.06 | \$53.57 | \$1.32 | \$55 | n/a | n/a |
| 522 | Middle School (Private) | student | 0.07 | \$62.50 | \$1.54 | \$64 | n/a | n/a |
| 530 | High School (Private) | student | 0.08 | \$71.43 | \$1.76 | \$73 | n/a | n/a |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | 0.10 | \$89.29 | \$2.20 | \$91 | n/a | n/a |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | 0.07 | \$62.50 | \$1.54 | \$64 | n/a | n/a |
| 560 | Church | 1,000 sf | 0.51 | \$455.36 | \$11.20 | \$467 | \$143 | 226.6% |
| 565 | Day Care | 1,000 sf | 0.89 | \$794.65 | \$19.55 | \$814 | \$305 | 166.9% |
| 610 | Hospital | 1,000 sf | 1.37 | \$1,223.22 | \$30.09 | \$1,253 | \$355 | 253.0% |
| 620 | Nursing Home | 1,000 sf | 1.72 | \$1,535.72 | \$37.78 | \$1,574 | \$155 | 915.5% |
| OFFICE: | | | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | 1.19 | \$1,062.50 | \$26.14 | \$1,089 | \$238 | 357.6% |
| | General Office 100,001-200,000 sf | 1,000 sf | 1.01 | \$901.79 | \$22.18 | \$924 | \$214 | 331.8% |
| | General Office 200,001-400,000 sf | 1,000 sf | 0.85 | \$758.93 | \$18.67 | \$778 | \$209 | 272.2% |
| | General Office greater than 400,000 sf | 1,000 sf | 0.77 | \$687.50 | \$16.91 | \$704 | \$196 | 259.2% |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | 1.14 | \$1,017.86 | \$25.04 | \$1,043 | \$325 | 220.9% |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 1.74 | \$1,553.58 | \$38.22 | \$1,592 | \$325 | 389.8% |
| RETAIL: | | | | | | | | |
| 820 | Retail 100,000 sf gla or less | 1,000 sf gla | 2.11 | \$1,883.93 | \$46.34 | \$1,930 | \$262 | 636.6% |
| | Retail 100,001-200,000 sf gla | 1,000 sf gla | 2.12 | \$1,892.86 | \$46.56 | \$1,939 | \$366 | 429.8% |
| | Retail 200,001-400,000 sf gla | 1,000 sf gla | 2.34 | \$2,089.29 | \$51.40 | \$2,141 | \$494 | 333.4% |
| | Retail greater than 400,000 sf gla | 1,000 sf gla | 2.44 | \$2,178.58 | \$53.59 | \$2,232 | \$453 | 392.7% |
| 841 | New/Used Auto Sales | 1,000 sf | 1.47 | \$1,312.50 | \$32.29 | \$1,345 | \$621 | 116.6% |
| 849 | Tire Superstore | service bay | 1.34 | \$1,196.43 | \$29.43 | \$1,226 | n/a | n/a |
| 850 | Supermarket | 1,000 sf | 2.05 | \$1,830.36 | \$45.03 | \$1,875 | n/a | n/a |
| 851 | Convenience Market (24 hour) | 1,000 sf | 5.47 | \$4,883.94 | \$120.14 | \$5,004 | \$1,183 | 323.0% |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | 5.83 | \$5,205.37 | \$128.05 | \$5,333 | \$1,183 | 350.8% |
| 862 | Home Improvement Superstore | 1,000 sf | 1.81 | \$1,616.08 | \$39.76 | \$1,656 | n/a | n/a |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | 1.96 | \$1,750.01 | \$43.05 | \$1,793 | \$239 | 650.2% |
| 890 | Furniture Store | 1,000 sf | 0.23 | \$205.36 | \$5.05 | \$210 | n/a | n/a |
| 911 | Bank/Savings Walk-In | 1,000 sf | 2.23 | \$1,991.08 | \$48.98 | \$2,040 | \$468 | 335.9% |
| 912 | Bank/Savings Drive-In ⁽⁷⁾ | 1,000 sf | 2.28 | \$2,035.72 | \$50.08 | \$2,086 | \$515 | 305.0% |
| 931 | Quality Restaurant | 1,000 sf | 6.82 | \$6,089.31 | \$149.80 | \$6,239 | \$1,182 | 427.8% |
| 932 | High-Turnover Restaurant | 1,000 sf | 6.78 | \$6,053.59 | \$148.92 | \$6,203 | \$1,473 | 321.1% |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | 8.90 | \$7,946.45 | \$195.48 | \$8,142 | \$1,473 | 452.7% |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 5.80 | \$5,178.59 | \$127.39 | \$5,306 | \$540 | 882.6% |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | 1.91 | \$1,705.36 | \$41.95 | \$1,747 | \$93 | 1778.5% |
| 947 | Self-Service Car Wash | service bay | 0.87 | \$776.79 | \$19.11 | \$796 | n/a | n/a |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | 7.15 | \$6,383.95 | \$157.05 | \$6,541 | \$1,183 | 452.9% |
| INDUSTRIAL: | | | | | | | | |
| 110 | General Light Industrial | 1,000 sf | 0.69 | \$616.07 | \$15.16 | \$631 | \$131 | 381.7% |
| 120 | General Heavy Industrial | 1,000 sf | 0.49 | \$437.50 | \$10.76 | \$448 | \$131 | 242.0% |
| 140 | Manufacturing | 1,000 sf | 0.50 | \$446.43 | \$10.98 | \$457 | \$131 | 248.9% |
| 150 | Warehousing | 1,000 sf | 0.28 | \$250.00 | \$6.15 | \$256 | \$68 | 276.5% |
| 151 | Mini-Warehouse | 1,000 sf | 0.06 | \$53.57 | \$1.32 | \$55 | \$26 | 111.5% |

- (1) Source: Appendix A, Table A-11 for residential and lodging land uses and Table A-13 for non-residential land uses
- (2) Calculated impact fee determined by multiplying the net impact cost per functional resident (Table II-3) by the functional resident coefficient (Item 1) for each land use
- (3) Calculated impact fee (Item 2) multiplied by 2.46% to determine the administrative fee
- (4) Sum of the calculated impact fee (Item 2) and the administrative fee (Item 3)
- (5) Source: Charlotte County Community Development Department; Includes a 2.46% administrative fee; fees are currently suspended
- (6) Percent change from the current adopted fee rate (Item 5) to the total impact fee (Item 4)
- (7) The current adopted fee rate (Item 5) is charged "per lane"

Public Buildings Impact Fee Schedule Comparison

As part of the work effort in updating Charlotte County's public buildings impact fee schedule, the County's calculated impact fee schedule was compared to the adopted fee schedules in similar or nearby jurisdictions. Table II-8 presents this comparison. As presented, the calculated fees for the County under Scenario 1 are in the range of other jurisdictions and higher than other jurisdictions under Scenario 2, when non-impact fee funding availability is limited, resulting in a low credit and higher impact fee.

TECHNICAL

**Table II-8
Public Buildings Impact Fee Schedule Comparison**

| Land Use | Unit ⁽²⁾ | Charlotte County | | | Collier County ⁽⁶⁾ | Martin County ⁽⁷⁾ | Indian River County ⁽⁸⁾ | Sarasota County ⁽⁹⁾ | Desoto County ⁽¹⁰⁾ | City of Punta Gorda ⁽¹¹⁾ | City of North Port ⁽¹²⁾ | City of Venice ⁽¹³⁾ |
|-----------------------------|---------------------|--|--|-------------------------|-------------------------------|------------------------------|------------------------------------|--------------------------------|-------------------------------|-------------------------------------|------------------------------------|--------------------------------|
| | | Calculated (Scenario 1) ⁽³⁾ | Calculated (Scenario 2) ⁽⁴⁾ | Existing ⁽⁵⁾ | | | | | | | | |
| Date of Last Update | - | 2014 | 2014 | 2009 | 2010 | 2012 | 2005/14 | 2007 | 2006 | 2006 | 2011 | n/a |
| Adoption % ⁽¹⁾ | - | 100% | 100% | 62% | 100% | 100% | 100%/26% | 100% | 100% | 100% | 33% | n/a |
| Residential: | | | | | | | | | | | | |
| Single Family (2,000 sq ft) | du | \$739 | \$1,299 | \$378 | \$766 | \$656 | \$211 | \$347 | \$763 | \$723 | \$144 | \$73 |
| Non-Residential: | | | | | | | | | | | | |
| Light Industrial | 1,000 sf | \$359 | \$631 | \$131 | \$271 | \$185 | \$88 | \$108 | \$460 | \$261 | \$57 | \$22 |
| Office (50,000 sq ft) | 1,000 sf | \$619 | \$1,089 | \$238 | \$558 | \$321 | \$128 | \$181 | \$780 | \$468 | \$116 | \$38 |
| Retail (125,000 sq ft) | 1,000 sf | \$1,103 | \$1,939 | \$366 | \$883 | \$559 | \$303 | \$451 | \$440 | \$496 | \$176 | \$94 |
| Bank w/Drive-In | 1,000 sf | \$1,187 | \$2,086 | \$515 | \$895 | \$562 | \$292 | \$451 | \$440 | \$675 | \$187 | \$94 |
| Fast Food w/Drive-Thru | 1,000 sf | \$4,632 | \$8,142 | \$1,473 | \$3,539 | \$2,519 | \$1,139 | \$451 | \$440 | \$1,633 | \$739 | \$94 |

- (1) Represents the portion of the maximum calculated fee that was originally adopted
- (2) du = dwelling unit
- (3) Source: Table II-6
- (4) Source: Table II-7
- (5) Source: Charlotte County Community Development Department; Fees include 2.46% administrative charge; Fees were adopted at 62% in 2009 and have been reduced approximately 20% since 2009 through annual indexing; Bank w/Drive-In is measured "per lane"; **Fees are currently suspended**
- (6) Source: Collier County Impact Fee Administration Department
- (7) Source: Martin County Growth Management Department; Fees include 1.5% administration fee
- (8) Source: Indian River County Planning Division; Fees include 2.5% administration fee. **Fees are currently suspended for residential land uses.** IRC is in the process of updating its impact fee program. The County adopted the calculated non-residential impact fees in April of 2014 and is finalizing the calculations for residential land uses. Non-residential fees were adopted at 26%.
- (9) Source: Sarasota County Planning & Development Services; Fees include 2.25% administration fee
- (10) Source: Desoto County Planning & Zoning Department; **Fees are currently suspended through November 2014**
- (11) Source: City of Punta Gorda Zoning Department. City collects a "general government" fee as well as the County's public buildings fee. **Both fees are currently suspended**
- (12) Source: City of North Port Economic Development Department
- (13) Source: City of Venice Building and Code Enforcement; City charges approximately 21% of the County fee; Fees include 2.25% administration fee

III. Libraries

Library impact fees are used to fund the capital construction and expansion of library services related buildings, land, and materials/equipment required to support the additional library facilities demand created by new growth. This section provides the results of the library impact fee analysis. There are several major elements associated with the development of the library facilities impact fee:

- Facility Inventory
- Service Area and Population
- Level-of-Service
- Cost Component
- Credit Component
- Net Library Facilities Impact Cost
- Calculated Library Facilities Impact Fee Schedule
- Library Facilities Impact Fee Schedule Comparison

These various elements are summarized in this section. It should be noted that library impact fees are charged to residential land uses only.

Facility Inventory

The Charlotte County Library Service operates four libraries with a total square footage of 73,000. The acreage associated with this square footage (3.02 acres) includes only the portion of the land associated with the library building. Of the four libraries, three are co-located with other facilities. As such, either the acreage is included in another impact fee program area, such as parks, or distributed among all of the buildings. Table III-1 presents the details of the library inventory.

The building value is estimated at \$240 per square foot based on recent library construction, insurance values of existing libraries, and information from other Florida jurisdictions. Land value for library buildings is estimated at \$100,000 per acre based on value of current parcels, an analysis of recent vacant land sales and values, and discussion with County representatives. Appendix B provides additional information on building and land value estimates.

**Table III-1
Library Land & Building Inventory**

| Facility Description | Address | Year Built ⁽¹⁾ | Acres ⁽¹⁾ | Library Square Footage ⁽¹⁾ | Total Square Footage on Site ⁽¹⁾ | Allocated Acreage ⁽²⁾ | Land Value ⁽³⁾ | Building Value ⁽⁴⁾ | Total Building and Land Value ⁽⁵⁾ |
|---|-------------------------|---------------------------|----------------------|---------------------------------------|---|----------------------------------|---------------------------|-------------------------------|--|
| Port Charlotte Library | 2280 Aaron Street | 1968 | 8.02 | 12,556 | 130,758 | 0.77 | \$77,000 | \$3,013,440 | \$3,090,440 |
| Punta Gorda Library | 424 W Henry St | 1974 | 1.24 | 9,145 | 9,145 | 1.24 | \$124,000 | \$2,194,800 | \$2,318,800 |
| Englewood Library | 3450 North Access Rd | 1989 | n/a ⁽⁶⁾ | 7,185 | 19,850 | n/a ⁽⁶⁾ | n/a ⁽⁶⁾ | \$1,724,400 | \$1,724,400 |
| Mid County Regional Library | 2050 Forest Nelson Blvd | 1988 | 5.17 | 43,860 | 225,205 | 1.01 | \$101,000 | \$10,526,400 | \$10,627,400 |
| Total | | | 14.43 | 72,746 | 384,958 | 3.02 | \$302,000 | \$17,459,040 | \$17,761,040 |
| Building Value per Square Foot ⁽⁷⁾ | | | | | | | | \$240 | |
| Land Value per Acre ⁽⁸⁾ | | | | | | | \$100,000 | | |

(1) Source: Charlotte County

(2) Library square footage divided by total square footage and multiplied by acres

(3) Allocated acreage (Item 2) multiplied by the land value per acre (Item 8)

(4) Library square footage multiplied by the building value per square foot (Item 7)

(5) Sum of land value (Item 3) and building value (Item 4)

(6) Land acreage is included in the parks inventory since Englewood Library is located in Tringali Park

(7) Based on recent construction costs, insurance values, and information from other Florida jurisdictions. See Appendix B for additional detail.

(8) Based on a review of land value of parcels where existing buildings are located as well as an analysis of vacant land sales and values. See Appendix B for additional detail.

The library facilities identified in Table III-1 house a wide variety of materials available to the public. Table III-2 presents the inventory of library materials.

**Table III-2
Library Material Inventory**

| Description | Units | Unit Cost | Total Cost |
|---|----------------|-----------|--------------------|
| <i>Books:</i> | | | |
| Reference, Genealogy, Non-Fiction Books | 63,030 | \$85 | \$5,357,550 |
| Adult Fiction Books | 75,785 | \$26 | \$1,970,410 |
| Juvenile/YA Reference Books | 527 | \$19 | \$10,013 |
| Juvenile/YA Non-Fiction Books | 19,785 | \$19 | \$375,915 |
| Juvenile/YA Fiction | 38,906 | \$15 | \$583,590 |
| Paperbacks | 2,118 | \$6 | \$12,708 |
| Books on Tape/CD | 9,482 | \$30 | \$284,460 |
| Electronic Books | 1,415 | \$30 | \$42,450 |
| Total - Books | 211,048 | - | \$8,637,096 |
| <i>Other Library Items:</i> | | | |
| Music CDs | 10,870 | \$14 | \$152,180 |
| DVDs | 29,321 | \$19 | \$557,099 |
| Videos | 2,833 | \$25 | \$70,825 |
| Print Subscriptions | 3,446 | \$9 | \$31,014 |
| Other Print Materials | 2,997 | \$15 | \$44,955 |
| Total - Other Library Items | 49,467 | - | \$856,073 |
| Total - All Library Materials | 260,515 | - | \$9,493,169 |

Source: Charlotte County

In addition to the available material, the Charlotte County Library System owns a variety of equipment, both for public use and for its own operations. Table III-3 presents the inventory of equipment for public versus operational use. It should be noted that impact fee standards are based on the equipment for public use, excluding the equipment used by the library staff.

**Table III-3
Library Equipment Inventory**

| Equipment | Number of Items | | | Unit Value | Total Value |
|--|-----------------|-----------|------------|------------|------------------|
| | Public | Staff | Total | | |
| Black & White Laser Printers | 6 | 7 | 13 | \$1,500 | \$19,500 |
| Color Laser Printers | 1 | 8 | 9 | \$2,800 | \$25,200 |
| Computers | <u>165</u> | <u>61</u> | <u>226</u> | \$1,000 | \$226,000 |
| Total - All Items | 172 | 76 | 248 | - | \$270,700 |
| Total - All (excluding computers) | 7 | 15 | 22 | - | \$44,700 |

Source: Charlotte County

Service Area and Population

Library services are provided on a countywide basis and the impact fee is charged only to residential land uses. As such, consistent with the County's Comprehensive Plan, countywide weighted seasonal population is used in the calculation. The County's current population estimates and future population projections are provided in Appendix A, Table A-1.

Level-of-Service

The following table provides a summary of the current achieved LOS for library buildings, books, other library materials, and computers in Charlotte County.

**Table III-4
Library Facilities Level-of-Service (2014)**

| Item | Sq. Footage/ Count ⁽¹⁾ | Population ⁽²⁾ | LOS (per 1,000 Residents) |
|---------------------------|--------------------------------------|---------------------------|------------------------------|
| Library Buildings (sf) | 72,746 | 180,425 | 403 |
| Library Materials (items) | 260,515 | 180,425 | 1,444 |
| Computers ⁽³⁾ | 165 | 180,425 | 0.91 |

(1) Source: Table III-1 for buildings, Table III-2 for materials, and Table III-3 for computers

(2) Source: Appendix A, Table A-1

(3) Only computers available for public use are included

A comparison of the current Charlotte County LOS and the suggested State standards is presented in Table III-5.

**Table III-5
Comparison of Charlotte County Current LOS to Florida Standards**

| Item | Charlotte LOS (per 1,000 Residents) ⁽¹⁾ | FL Public Library Standards ⁽²⁾ | | |
|----------------------------------|--|--|----------|-----------|
| | | Essential | Enhanced | Exemplary |
| Library Buildings (sq. ft.) | 403 | 600 | 700 | 1,000 |
| Library Materials ⁽³⁾ | 1,444 | 2,000 | 3,000 | 4,000 |
| Computers | 0.91 | 0.30 | 0.50 | 1.00 |

(1) Source: Table III-4

(2) Source: *Standards for Florida Public Libraries*, 2004; Updated April 2013

(3) Library materials include books, online resources, subscriptions, and other library items

Charlotte County's achieved LOS for buildings and library materials do not meet the Florida Library Association's (FLA) essential standards. However, the County's LOS for computers is between the enhanced and exemplary LOS standards established by the State.

The following table provides a comparison of the current Charlotte County LOS to other counties with a population of 100,000 to 750,000, and is based on the information obtained from the *Library Directory with Statistics*, published by the Department of State, Division of Library and Information Services. Charlotte County's LOS ranks in the middle for building square footage and relatively low in terms of library materials. In terms of computers, Charlotte County is higher than the average of peer counties and for the average of all counties statewide.

**Table III-6
Comparison of Charlotte County Current LOS to Peer Counties
(per 1,000 residents)**

| Jurisdiction | LOS Per 1,000 Residents | | |
|--|------------------------------------|-------------------------------------|--------------------------|
| | Library Buildings (square feet) | Library Materials ⁽¹⁾ | Computers ⁽²⁾ |
| Pasco County | 242 | 1,204 | 0.39 |
| Polk County | 314 | 1,346 | 0.45 |
| Manatee County | 335 | 1,401 | 0.38 |
| Marion County | 350 | 1,684 | 0.64 |
| Desoto County | 390 | 2,438 | 0.66 |
| Charlotte County (Existing) | 403 | 1,444 | 0.91 |
| Lee County | 420 | 2,378 | 0.70 |
| Collier County | 549 | 2,026 | 0.64 |
| Sarasota County | 603 | 2,437 | 0.65 |
| Brevard County | 698 | 2,493 | 0.78 |
| Lake County | 727 | 2,257 | 1.47 |
| Martin County | 747 | 2,482 | 1.26 |
| Indian River County | 791 | 4,074 | 1.00 |
| Peer Group (Excl. Charlotte County) | 437 | 1,828 | 0.69 |
| State of Florida (Excl. Charlotte County) | 503 | 2,014 | 0.81 |

(1) Library materials for Charlotte include books, CDs, DVDs, videos, and print materials. Library materials for other counties include books, serial subscriptions, and Audio/video volumes

(2) Source: Department of State – Division of Library & Information Services, 2011/12 Library Directory with Statistics; Includes public computers only. Peer counties are defined as Florida counties with a population of 100,000 to 750,000.

Cost Component

Costs are calculated separately for facilities and items/equipment. Facility costs are based on the estimated cost to add the next library building, and the cost of library items and equipment is based on the estimated current value per unit.

Table III-7 summarizes the calculation of library facility, land values, and materials/equipment values. The total impact cost or total value per resident for library buildings and land in Charlotte County is \$153.

**Table III-7
Total Library Facilities Impact Cost per Resident**

| Element | Cost | Percent of Total Value ⁽⁷⁾ |
|---|---------------------|---------------------------------------|
| Total Building Value ⁽¹⁾ | \$17,459,040 | 63.43% |
| Total Land Value ⁽²⁾ | \$302,000 | 1.10% |
| Total Library Materials & Equipment ⁽³⁾ | \$9,763,869 | 35.47% |
| Total Capital Asset Value ⁽⁴⁾ | \$27,524,909 | 100.00% |
| Population ⁽⁵⁾ | 180,425 | |
| Total Impact Cost per Resident⁽⁶⁾ | \$152.56 | |

(1) Source: Table III-1

(2) Source: Table III-1

(3) Source: Tables III-2 and III-3

(4) Sum of building (Item 1), land (Item 2), and materials & equipment (Item 3) values

(5) Source: Appendix A, Table A-1

(6) Total asset value (Item 4) divided by the population (Item 5)

(7) Distribution of building, land, and materials & equipment values

Credit Component

To avoid overcharging new development, a review of funding for library capital expansion projects over the past five years and those programmed for the next six years was completed. The purpose of this review was to determine any potential revenues generated by new development, other than impact fees, that are likely to be used to fund the expansion of capital facilities, land, and materials for the County’s libraries program. This review suggests that historically the County used primarily ad valorem revenues to fund capacity expansion over the past five years and will continue to use ad valorem, and potentially sales tax revenues, for future expenditures. It should be noted that the credit component does not include any capital renovation, maintenance, or operations expenses, as these types of expenditures cannot be funded with impact fee revenue.

Capital Improvement Credit

Table III-8 summarizes the library related capital expansion projects that are funded ad valorem and sales tax. The table includes historical and future planned projects for the years 2009 through 2019. The average annual capital expansion expenditure is \$4.79 per resident for Scenario 1, which includes potential sales tax contributions. If the sales tax is not renewed, the average annual expenditure per resident drops to \$1.33 based on the ad valorem contributions, as shown for Scenario 2.

**Table III-8
Library Facility Capital Expansion Funding⁽¹⁾**

| Project Description | FY 2009 to FY 2013 | FY 2014 | FY 2015 | FY 2016 | FY 2017 | FY 2018 | FY 2019 | Total |
|--|-----------------------|------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Ad Valorem Tax: | | | | | | | | |
| Englewood Library Expansion | \$1,397,423 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$1,397,423 |
| Library Books and Material | \$0 | \$190,000 | \$190,000 | \$190,000 | \$190,000 | \$190,000 | \$190,000 | \$1,140,000 |
| Library Master Facility Plan | \$0 | \$0 | \$100,000 | \$0 | \$0 | \$0 | \$0 | \$100,000 |
| Sales Tax: | | | | | | | | |
| South County Library & Archive | \$0 | \$0 | \$1,380,200 | \$1,380,200 | \$1,380,200 | \$1,380,200 | \$1,380,200 | \$6,901,000 |
| Total (AdVal & Sales Tax) | \$1,397,423 | \$190,000 | \$1,670,200 | \$1,570,200 | \$1,570,200 | \$1,570,200 | \$1,570,200 | \$9,538,423 |
| Average Annual Expenditures⁽²⁾ | | | | | | | | \$867,129 |
| Average Annual Population⁽³⁾ | | | | | | | | 180,941 |
| Average Annual Expenditures by Resident⁽⁴⁾ | | | | | | | | \$4.79 |
| Total (AdVal ONLY) | \$1,397,423 | \$190,000 | \$290,000 | \$190,000 | \$190,000 | \$190,000 | \$190,000 | \$2,637,423 |
| Average Annual Expenditures⁽⁵⁾ | | | | | | | | \$239,766 |
| Average Annual Population⁽⁶⁾ | | | | | | | | 180,941 |
| Average Annual Expenditures by Resident⁽⁷⁾ | | | | | | | | \$1.33 |

- (1) Source: Charlotte County Staff; Capital Improvement Program
- (2) Total ad valorem and sales tax revenues, divided by 11 years
- (3) Source: Appendix A, Table A-1; Average annual population from 2009 to 2019
- (4) Average annual expenditures (Item 3) divided by the average annual population (Item 4)
- (5) Total ad valorem revenues only, divided by 11 years
- (6) Source: Appendix A, Table A-1; Average annual population from 2009 to 2019
- (7) Average annual expenditures (Item 6) divided by the average annual population (Item 7)

Net Library Facilities Impact Cost

The net impact fee per residence is the difference between the cost component and the credit component. Table III-9 summarizes the calculation of the net library impact cost per resident with and without the renewal of the sales tax.

**Table III-9
Net Library Facilities Impact Cost per Resident**

| Impact Cost/Credit Element | With Sales Tax | | Without Sales Tax | |
|---|----------------|----------------|-------------------|----------------|
| | Impact Cost | Revenue Credit | Impact Cost | Revenue Credit |
| Impact Cost | | | | |
| Total Impact Cost per Resident ⁽¹⁾ | \$152.56 | - | \$152.56 | - |
| Revenue Credit | | | | |
| Average Annual Capital Expansion Credit per Resident ⁽²⁾ | | \$4.79 | - | \$1.33 |
| Capitalization Rate | | 4.0% | - | 4.0% |
| Capitalization Period (in years) | | 25 | - | 25 |
| Capital Expansion Credit per Resident ⁽³⁾ | | \$74.83 | - | \$20.78 |
| Net Impact Cost | | | | |
| Net Impact Cost per Resident ⁽⁴⁾ | \$77.73 | - | \$131.78 | - |

(1) Source: Table III-7

(2) Source: Table III-8

(3) Present value of the capital expansion credit per resident (Item 2) at a discount rate of 4.0 percent with a capitalization period of 25 years

(4) Total impact cost per resident (Item 1) less the capital expansion credit per resident (Item 3)

Calculated Library Facilities Impact Fee Schedule

The calculated library impact fee for each residential land use is presented in Table III-10. The net impact cost per resident calculated in the previous section is applied to the average persons per unit by land use. For Scenario 1 (including sales tax funding), the resulting total impact fees per dwelling unit range from \$84 for the multi-family/single family attached land use to \$159 for the single family land use. For Scenario 2 (excluding sales tax funding), the resulting total impact fees per dwelling unit range from \$143 for the multi-family/single family attached land use to \$270 for the single family land use.

**Table III-10
Calculated Library Facilities Impact Fee Schedule**

| ITE LUC | Residential Land Use | Unit | Residents per Unit ⁽¹⁾ | Net Cost per Resident ⁽²⁾ | Impact Fee ⁽³⁾ | Administrative Fee ⁽⁴⁾ | Total Impact Fee ⁽⁵⁾ | Adopted Impact Fee ⁽⁶⁾ | Percent Change ⁽⁷⁾ |
|---|-------------------------------------|------|-----------------------------------|--------------------------------------|---------------------------|-----------------------------------|---------------------------------|-----------------------------------|-------------------------------|
| <i>Credit Scenario 1 (With Sales Tax)</i> | | | | | | | | | |
| 210 | Single Family (Detached) | du | 2.00 | \$77.73 | \$155.46 | \$3.82 | \$159 | \$133 | 20% |
| 220/230 | Multi-Family/Single Family Attached | du | 1.06 | \$77.73 | \$82.39 | \$2.03 | \$84 | \$90 | -7% |
| 240 | Mobile Home | du | 1.09 | \$77.73 | \$84.73 | \$2.08 | \$87 | \$94 | -7% |
| <i>Credit Scenario 2 (Without Sales Tax)</i> | | | | | | | | | |
| 210 | Single Family (Detached) | du | 2.00 | \$131.78 | \$263.56 | \$6.48 | \$270 | \$133 | 103% |
| 220/230 | Multi-Family/Single Family Attached | du | 1.06 | \$131.78 | \$139.69 | \$3.44 | \$143 | \$90 | 59% |
| 240 | Mobile Home | du | 1.09 | \$131.78 | \$143.64 | \$3.53 | \$147 | \$94 | 56% |

(1) Source: Appendix A, Table A-2

(2) Source: Table III-9

(3) Residents per unit (Item 1) multiplied by net cost per resident (Item 2)

(4) Impact fee (Item 3) multiplied by 2.46% to calculate the administrative fee

(5) Sum of the impact fee (Item 3) and the administrative fee (Item 4)

(6) Source: Charlotte County Community Development Department; Fees shown include a 2.46% administrative fee; Fees as currently suspended

(7) Percent change from the current adopted rates (Item 6) to the total impact fee (Item 5)

Library Facilities Impact Fee Schedule Comparison

As part of the work effort in updating Charlotte County’s library facilities impact fee program, a comparison of library facilities impact fee schedules was completed for other Florida counties. Table III-11 presents this comparison.

TECHNICAL

**Table III-11
Library Facilities Impact Fee Schedule Comparison**

| Land Use | Unit ⁽²⁾ | Charlotte County | | | Polk County ⁽⁵⁾ | Pasco County ⁽⁶⁾ | Collier County ⁽⁷⁾ | Lake County ⁽⁸⁾ | Martin County ⁽⁹⁾ | Indian River County ⁽¹⁰⁾ | Sarasota County ⁽¹¹⁾ | Brevard County ⁽¹²⁾ | Desoto County ⁽¹³⁾ | City of Punta Gorda ⁽¹⁴⁾ | City of Venice ⁽¹⁵⁾ |
|---------------------------|---------------------|--|--|-------------------------|----------------------------|-----------------------------|-------------------------------|----------------------------|------------------------------|-------------------------------------|---------------------------------|--------------------------------|-------------------------------|-------------------------------------|--------------------------------|
| | | Calculated (Scenario 1) ⁽³⁾ | Calculated (Scenario 2) ⁽³⁾ | Existing ⁽⁴⁾ | | | | | | | | | | | |
| Date of Last Update | - | 2014 | 2014 | 2009 | 2009 | 2002 | 2010 | 2003 | 2012 | 2009 | 2007 | 2001 | 2006 | n/a | n/a |
| Adoption % ⁽¹⁾ | - | 100% | 100% | 78% | 50% | 100% | 100% | 95% | 100% | 100% | 100% | 100% | 100% | 100% | n/a |
| Residential: | | | | | | | | | | | | | | | |
| Single Family (2,000 sf) | du | \$159 | \$270 | \$133 | \$84 | \$145 | \$315 | \$197 | \$534 | \$495 | \$389 | \$64 | \$128 | \$133 | \$389 |
| Multi-Family | du | \$84 | \$143 | \$90 | \$61 | \$97 | \$160 | \$150 | \$534 | \$292 | \$389 | \$38 | \$128 | \$90 | \$389 |
| Mobile Home | du | \$87 | \$147 | \$94 | \$54 | \$97 | \$237 | \$157 | \$534 | \$358 | \$259 | \$46 | \$128 | \$94 | \$259 |

(1) Represents the portion of the maximum calculated fee that was originally adopted

(2) Du = dwelling unit

(3) Source: Table III-10; Includes 2.46% administrative charge

(4) Source: Charlotte County Community Development Department; Includes 2.46% administrative charge; Fees have been reduced approximately 20% since 2009 through annual indexing; Fee is currently suspended

(5) Source: Polk County Building & Construction Department; Fee is currently suspended through July 2015

(6) Source: Pasco County Central Permitting Department

(7) Source: Collier County Impact Fee Administration Department

(8) Source: Lake County Growth Management Department; Includes 3.0% administrative charge

(9) Source: Martin County Growth Management Department; Includes 1.5% administrative charge

(10) Source: Indian River County Planning Division; Includes 2.5% administrative charge

(11) Source: Sarasota County Planning & Development Services; Includes 2.25% administrative charge

(12) Source: Brevard County Planning & Development Department

(13) Source: Source: Desoto County Planning & Zoning Department; Fee is currently suspended through November 2014

(14) Source: City of Punta Gorda Zoning Department; City does not have its own fee and collects the County fee; Fee is currently suspended indefinitely

(15) Source: City of Venice Building and Code Enforcement; Sarasota County impact fee rates are charged within the City of Venice; Includes 2.25% administrative charge

IV. Fire/Emergency Medical Services

This section provides the results of the fire and emergency medical services (EMS) impact fee analysis. There are several major elements associated with the development of the Fire/EMS impact fee:

- Facility Inventory
- Service Area and Population
- Level-of-Service
- Cost Component
- Credit Calculation
- Net Fire/EMS Impact Cost
- Calculated Fire/EMS Impact Fee Schedule
- Fire/EMS Impact Fee Schedule Comparison

These various elements are summarized in the remainder of this section with the result being the calculated Fire/Emergency Medical Services impact fee schedule.

Facility Inventory

Table IV-1 presents the building and land inventory for Charlotte County. Charlotte County currently has a total of 8 fire/EMS stations, 6 fire (only) stations, 2 EMS (only) stations and one fire/EMS vehicle maintenance building. Table IV-1 summarizes the County's fire and emergency medical services land and building inventory. The value of buildings and land are based on insurance and land values of the existing facilities, vacant land sales and values of parcels with similar characteristics, and information obtained from other jurisdictions. A more detailed explanation of building and land value estimates is included in Appendix B.

**Table IV-1
Fire/EMS Land and Building Inventory**

| Facility Description | Address | Year Acquired/ Built | Number of Bays ⁽¹⁾ | Total Acres ⁽²⁾ | Allocated Acres ⁽³⁾ | Total Square Feet ⁽⁴⁾ | Allocated Square Feet ⁽⁵⁾ | Land Value ⁽⁶⁾ | Building Value ⁽⁷⁾ | Total Building and Land Value ⁽⁸⁾ |
|---|--|-------------------------|-------------------------------|----------------------------|--------------------------------|----------------------------------|--------------------------------------|---------------------------|-------------------------------|--|
| Fire | | | | | | | | | | |
| Station #1 | 3625 Tamiami Trail, Port Charlotte | 2006 | 3 | 0.62 | 0.47 | 8,437 | 6,328 | \$28,200 | \$1,455,440 | \$1,483,640 |
| Station #2 | 1493 Collingswood Blvd, Port Charlotte | 1985 | 4 | 1.05 | 0.79 | 6,135 | 4,601 | \$47,400 | \$1,058,230 | \$1,105,630 |
| Station #3 | 4322 El Jobean Rd, El Jobean | 1978 | 2 | 0.39 | 0.29 | 4,809 | 3,607 | \$17,400 | \$829,610 | \$847,010 |
| Station #4 | 13600 Marathon Blvd, Gulf Cove | 1987 | 2 | 1.00 | 1.00 | 3,805 | 3,805 | \$60,000 | \$875,150 | \$935,150 |
| Station #5 | 26287 Notre Dame Blvd, Punta Gorda | 1974 | 3 | 0.72 | 0.54 | 5,521 | 4,141 | \$32,400 | \$952,430 | \$984,830 |
| Station #6 | 27589 Disston Ave, Punta Gorda | 1982 | 3 | 0.73 | 0.55 | 5,400 | 4,050 | \$33,000 | \$931,500 | \$964,500 |
| Station #7 | 27137 Mooney Ave, Punta Gorda | 2007 | 2 | (Airport) | N/A ⁽⁹⁾ | 6,882 | 5,162 | N/A ⁽⁹⁾ | \$1,187,260 | \$1,187,260 |
| Station #8 | 21500 Clinton Ave, Port Charlotte | 2006 | 2 | 6.32 | 4.74 | 6,440 | 4,830 | \$284,400 | \$1,110,900 | \$1,395,300 |
| Station #9 | 12900 SR 31, Punta Gorda | 1986 | 2 | 1.00 | 1.00 | 2,976 | 2,976 | \$60,000 | \$684,480 | \$744,480 |
| Station #10 | 101 Gasparilla Way, Englewood | 1991 | 2 | 1.00 | 1.00 | 3,220 | 3,220 | \$60,000 | \$740,600 | \$800,600 |
| Station #11 | 27055 Rushmore Ave, Harbor Heights | 2008 | 2 | 0.31 | 0.31 | 5,105 | 5,105 | \$18,600 | \$1,174,150 | \$1,192,750 |
| Station #12 | 2001 Luther Rd, Port Charlotte | 1998 | 3 | 2.80 | 2.10 | 9,632 | 7,224 | \$126,000 | \$1,661,520 | \$1,787,520 |
| Station #15 | 13190 Eisenhower Dr, Port Charlotte | 2007 | 2 | 1.00 | 1.00 | 6,449 | 6,449 | \$60,000 | \$1,483,270 | \$1,543,270 |
| Station #16 | 29400 Palm Shores Blvd, Punta Gorda | 2007 | 2 | 2.00 | 2.00 | 6,533 | 6,533 | \$120,000 | \$1,502,590 | \$1,622,590 |
| Vehicle Maintenance | 26581 Airport Road, Punta Gorda | 2007 | 7 | 44.20 | 1.97 | 369,641 | 16,500 | \$118,200 | \$2,722,500 | \$2,840,700 |
| Subtotal -- Fire | | | | | 17.76 | | 84,531 | \$1,065,600 | \$18,369,630 | \$19,435,230 |
| EMS | | | | | | | | | | |
| Station #1 | 3625 Tamiami Trail, Port Charlotte | 2006 | 3 | 0.62 | 0.15 | 8,437 | 2,109 | \$9,000 | \$485,070 | \$494,070 |
| Station #2 | 1493 Collingswood Blvd, Port Charlotte | 1985 | 4 | 1.05 | 0.26 | 6,135 | 1,534 | \$15,600 | \$352,820 | \$368,420 |
| Station #3 | 4322 El Jobean Rd, El Jobean | 1978 | 2 | 0.39 | 0.10 | 4,809 | 1,202 | \$6,000 | \$276,460 | \$282,460 |
| Station #5 | 26287 Notre Dame Blvd, Punta Gorda | 1974 | 3 | 0.72 | 0.18 | 5,521 | 1,380 | \$10,800 | \$317,400 | \$328,200 |
| Station #6 | 27589 Disston Ave, Punta Gorda | 1982 | 3 | 0.73 | 0.18 | 5,400 | 1,350 | \$10,800 | \$310,500 | \$321,300 |
| Station #7 | 27137 Mooney Ave, Punta Gorda | 2007 | 2 | (Airport) | N/A ⁽⁹⁾ | 6,882 | 1,720 | N/A ⁽⁹⁾ | \$395,600 | \$395,600 |
| Station #8 | 21500 Clinton Ave, Port Charlotte | 2006 | 2 | 6.32 | 1.58 | 6,440 | 1,610 | \$94,800 | \$370,300 | \$465,100 |
| Station #12 | 2001 Luther Rd, Port Charlotte | 1998 | 3 | 2.80 | 0.70 | 9,632 | 2,408 | \$42,000 | \$553,840 | \$595,840 |
| Station #13 | 6868 San Casa Rd, Englewood | 2004 | 2 | 11.30 | 2.09 | 22,073 | 4,078 | \$125,400 | \$937,940 | \$1,063,340 |
| Station #14 | 9495 Placida Rd, Placida | 2004 | 2 | 1.23 | 1.23 | 4,013 | 4,013 | \$73,800 | \$922,990 | \$996,790 |
| Vehicle Maintenance | 26581 Airport Road, Punta Gorda | 2007 | 7 | 44.20 | 0.66 | 369,641 | 5,500 | \$39,600 | \$907,500 | \$947,100 |
| Subtotal -- EMS | | | | | 7.13 | | 26,904 | \$427,800 | \$5,830,420 | \$6,258,220 |
| Total Value -- Fire/EMS | | | | | 24.89 | | 111,435 | \$1,493,400 | \$24,200,050 | \$25,693,450 |
| Building Cost per Square Foot ⁽¹⁰⁾ | | | | | | | | | \$217 | |
| Land Value per Acre ⁽¹¹⁾ | | | | | | | | \$60,000 | | |

(1) Source: Charlotte County

(2) Source: Charlotte County

(3) Total acres (Item 2) divided by total square footage (Item 4) and multiplied by the allocated square footage (Item 5)

(4) Source: Charlotte County

(5) Source: Charlotte County. For facilities offering both fire and EMS services, 75 percent of the square footage was allocated for "Fire" and 25 percent was allocated to "EMS."

(6) Allocated acres (Item 3) multiplied by the average land cost per acre (Item 11)

(7) Allocated square feet (Item 5) multiplied by the average building cost per square foot, which was estimated at \$230 per sq. ft. for stations and \$165 per sq. ft. for maintenance buildings

(8) Sum of the land value (Item 6) and the building value (Item 7)

(9) Land is leased from the Airport Authority

(10) Total building value (Item 7) divided by the total allocated square footage (Item 5). Additional information on building values is included in Appendix B

(11) Source: Appendix B

In addition to land and buildings, the Charlotte County fire and EMS inventories include the necessary vehicles and equipment required to perform its services. As presented in Table IV-2, the total vehicle cost is approximately \$22 million.

**Table IV-2
Fire/EMS Vehicle Inventory and Values**

| Description | Units ⁽¹⁾ | Unit Cost ⁽¹⁾ | Total Value ⁽²⁾ |
|------------------------|----------------------|--------------------------|----------------------------|
| Fire Vehicles | | | |
| Staff Vehicle | 21 | \$29,000 | \$609,000 |
| Truck, Tanker | 2 | \$350,000 | \$700,000 |
| Truck, Air | 1 | \$325,000 | \$325,000 |
| Truck, Pumper | 18 | \$563,000 | \$10,134,000 |
| Truck, Aerial Platform | 1 | \$1,000,000 | \$1,000,000 |
| ATV | 2 | \$35,000 | \$70,000 |
| Trailer, Utility | 3 | \$4,000 | \$12,000 |
| Boat | 2 | \$225,000 | \$450,000 |
| Truck, Cab & Chassis | 1 | \$700,000 | \$700,000 |
| Truck, HazMat | 1 | \$500,000 | \$500,000 |
| Truck, HazMat | 1 | \$900,000 | \$900,000 |
| Truck, Ladder | 1 | \$767,600 | \$767,600 |
| Truck, Water/Fuel | 1 | \$125,000 | \$125,000 |
| Truck, High Water | 1 | \$27,500 | \$27,500 |
| Trailer, Boat | 2 | \$9,000 | \$18,000 |
| Truck, Brush | 4 | \$150,000 | \$600,000 |
| Subtotal - Fire | 62 | | \$16,938,100 |
| EMS Vehicles | | | |
| Staff Vehicle | 7 | \$29,000 | \$203,000 |
| Ambulance | 17 | \$268,000 | \$4,556,000 |
| Subtotal - EMS | 24 | | \$4,759,000 |
| Total | 86 | | \$21,697,100 |

(1) Source: Charlotte County

(2) Units multiplied by unit cost

Table IV-3 presents the equipment inventory and related asset value for fire and EMS facilities in Charlotte County. The equipment included in Table IV-3 represents equipment in addition to that already accounted for as part of the vehicle value.

**Table IV-3
Fire/EMS Equipment Inventory and Values**

| Description | Total Units ⁽¹⁾ | Unit Cost ⁽²⁾ | Total Value ⁽³⁾ |
|------------------------|----------------------------|--------------------------|----------------------------|
| Fire Equipment | | | |
| Radio, Portable | 83 | \$2,116 | \$175,655 |
| Tank Fill Station | 1 | \$34,853 | \$34,853 |
| Radio, Base | 21 | \$3,891 | \$81,712 |
| Lifepak Charger | 3 | \$1,334 | \$4,001 |
| Lifepak 12 | 4 | \$21,244 | \$84,976 |
| TV Receiver | 3 | \$1,912 | \$5,735 |
| Penetrating Nozzle | 1 | \$1,575 | \$1,575 |
| Mower, Riding | 4 | \$5,312 | \$21,250 |
| Deck Gun | 3 | \$1,238 | \$3,713 |
| Pump, Floating | 3 | \$1,567 | \$4,700 |
| Water Tank, Portable | 1 | \$1,465 | \$1,465 |
| Waterous pump | 1 | \$3,610 | \$3,610 |
| Generator | 1 | \$1,500 | \$1,500 |
| Lifepak AED | 4 | \$2,093 | \$8,372 |
| Lighting System | 1 | \$1,026 | \$1,026 |
| Multi-Press Machine | 1 | \$2,430 | \$2,430 |
| Treadmill | 1 | \$3,759 | \$3,759 |
| Generator | 2 | \$1,259 | \$2,518 |
| Freezer | 1 | \$2,200 | \$2,200 |
| Electronic Siren | 1 | \$1,050 | \$1,050 |
| Gym System | 2 | \$1,134 | \$2,268 |
| Ice Machine | 1 | \$1,596 | \$1,596 |
| Range, Gas | 1 | \$3,280 | \$3,280 |
| Valve, Manifold | 1 | \$1,600 | \$1,600 |
| Fire Gear Rack, Mobile | 1 | \$8,891 | \$8,891 |
| Air Mask | 1 | \$3,997 | \$3,997 |
| Booster Hose Reel | 1 | \$1,072 | \$1,072 |
| Water Tank | 1 | \$2,700 | \$2,700 |
| Battery Support System | 1 | \$1,517 | \$1,517 |
| Crane | 1 | \$1,571 | \$1,571 |
| Hose Tester | 1 | \$1,523 | \$1,523 |
| Generator Welder | 1 | \$2,001 | \$2,001 |
| Torque Wrench | 1 | \$2,479 | \$2,479 |
| Air Compressor | 1 | \$1,466 | \$1,466 |
| Jack | 1 | \$1,850 | \$1,850 |
| Jack, Transmission | 1 | \$1,240 | \$1,240 |
| Trailer, Trauma | 1 | \$5,472 | \$5,472 |

Table IV-3 (continued)
Fire/EMS Equipment Inventory and Values

| Description | Total Units ⁽¹⁾ | Unit Cost ⁽²⁾ | Total Value ⁽³⁾ |
|------------------------|----------------------------|--------------------------|----------------------------|
| Fire Equipment | | | |
| Hydraulic Oil Filter | 1 | \$1,141 | \$1,141 |
| A/C Recovery System | 1 | \$3,867 | \$3,867 |
| Shipping Container | 1 | \$2,600 | \$2,600 |
| Stud Puller | 1 | \$2,659 | \$2,659 |
| Fork Lift | 1 | \$19,818 | \$19,818 |
| Scrubber | 1 | \$3,655 | \$3,655 |
| Refridgerant Reclaimer | 1 | \$2,525 | \$2,525 |
| Tank, Water | 1 | \$16,990 | \$16,990 |
| Storage Container | 1 | \$4,450 | \$4,450 |
| Valve, Intake | 2 | \$1,053 | \$2,107 |
| GPS Receiver | 1 | \$1,550 | \$1,550 |
| Camera, ID Kit | 1 | \$3,499 | \$3,499 |
| Phone | 2 | \$1,236 | \$2,472 |
| Rehab Station | 2 | \$2,595 | \$5,190 |
| Handheld Oximeter | 4 | \$2,695 | \$10,780 |
| Pump, Water | 1 | \$5,495 | \$5,495 |
| Welder | 2 | \$3,059 | \$6,119 |
| Rescue System | 1 | \$1,075 | \$1,075 |
| Test Scoring Machine | 1 | \$2,226 | \$2,226 |
| Somso Trunk | 1 | \$1,073 | \$1,073 |
| Smoke Machine | 1 | \$1,300 | \$1,300 |
| Star/Smart Board | 1 | \$2,695 | \$2,695 |
| Binding Machine | 1 | \$3,153 | \$3,153 |
| Projector, Digital | 1 | \$1,626 | \$1,626 |
| Camcorder | 2 | \$2,842 | \$5,684 |
| Gear Dryer | 1 | \$7,277 | \$7,277 |
| Uniforms | 172 | \$324 | \$55,687 |
| Safety Gear | 224 | \$2,918 | \$653,551 |
| Subtotal - Fire | | | \$1,320,887 |
| EMS Equipment | | | |
| Radio, Portable | 24 | \$2,079 | \$49,893 |
| Breathing Apparatus | 3 | \$1,996 | \$5,988 |
| Radio, Base | 5 | \$3,868 | \$19,339 |
| Lifepak Charger | 13 | \$1,611 | \$20,942 |
| TV Receiver | 1 | \$2,095 | \$2,095 |
| Freezer | 1 | \$2,040 | \$2,040 |
| Gym System | 1 | \$1,134 | \$1,134 |

**Table IV-3 (continued)
Fire/EMS Equipment Inventory and Values**

| Description | Total Units ⁽¹⁾ | Unit Cost ⁽²⁾ | Total Value ⁽³⁾ |
|------------------------|----------------------------|--------------------------|----------------------------|
| EMS Equipment | | | |
| Battery Support System | 1 | \$1,195 | \$1,195 |
| Valve, Intake | 1 | \$1,053 | \$1,053 |
| EMS Mannequin | 2 | \$1,100 | \$2,200 |
| Rhythm Simulator | 7 | \$1,030 | \$7,210 |
| Airway MGT Trainer | 8 | \$1,237 | \$9,895 |
| Mannequin (STAT) | 3 | \$2,965 | \$8,896 |
| Mannequin (TRAUMA) | 1 | \$1,120 | \$1,120 |
| Auscultation Trainer | 1 | \$2,545 | \$2,545 |
| Mannequin | 3 | \$1,043 | \$3,129 |
| Arrhythmia Simulator | 3 | \$1,002 | \$3,006 |
| Uniforms | 57 | \$324 | \$18,454 |
| Subtotal - EMS | | | \$160,134 |
| Total | | | \$1,481,021 |

(1) Source: Charlotte County

(2) Total value (Item 3) divided by total units (Item 1)

(3) Source: Charlotte County

Service Area and Population

Charlotte County provides emergency medical services countywide. In terms of fire rescue, the City of Punta Gorda maintains its own fire department, as does the Englewood Fire District. Therefore, the proper benefit district for fire services is the unincorporated county excluding the Englewood Fire District. For impact fee calculations, the current 2014 countywide functional population estimate was used for EMS impact fee calculations and functional population for unincorporated county excluding Englewood Fire District was used for fire impact fee calculations, which are provided in Appendix A.

Because simply using weighted population does not fully address all of the benefactors of fire and EMS, the “functional” weekly 24-hour population approach is used to establish a common unit of demand across different land uses (See Appendix A for further information).

Level-of-Service

Typically, level of service for fire/EMS is expressed in terms of stations per 1,000 residents. Using this method, Charlotte County's current level of service (LOS) is 1 station per 9,381 residents or 0.107 stations per 1,000 residents for fire services. In the case of EMS, the LOS is 1 station per 18,000 residents or 0.055 stations per 1,000 residents.

As mentioned in the previous sections, LOS needs to be measured using functional population to capture all residents, workers, and visitors that benefit from emergency services. In terms of functional population, LOS is calculated at 0.115 stations per 1,000 functional residents for fire services. For EMS, the LOS is calculated at 0.060 stations per 1,000 functional residents. Table IV-4 summarizes the calculation of the LOS using the 2014 population and functional population.

**Table IV-4
Fire/EMS Level-of-Service (2014)**

| Calculation Step | Year 2014 | |
|---|---------------------|-----------------------|
| | Weighted Population | Functional Population |
| <i>Fire (excluding Englewood Fire District):</i> | | |
| Population ⁽¹⁾ | 131,332 | 121,954 |
| Number of Stations ⁽²⁾ | 14 | 14 |
| Population per Station ⁽³⁾ | 9,381 | 8,711 |
| LOS (Stations per 1,000 Residents)⁽⁴⁾ | 0.107 | 0.115 |
| <i>EMS:</i> | | |
| Population ⁽⁵⁾ | 180,425 | 167,563 |
| Number of Stations ⁽⁶⁾ | 10 | 10 |
| Population per Station ⁽⁷⁾ | 18,043 | 16,756 |
| LOS (Stations per 1,000 Residents)⁽⁸⁾ | 0.055 | 0.060 |

(1) Source: Appendix A, Table A-1 for population and A-9 for functional population

(2) Source: Table IV-1

(3) Population (Item 1) divided by the number of stations (Item 2)

(4) Number of stations (Item 2) divided by the population (Item 1) and multiplied by 1,000

(5) Source: Appendix A, Table A-1 for population and A-8 for functional population

(6) Source: Table IV-1

(7) Population (Item 5) divided by the number of station (Item 6)

(8) Number of stations (Item 6) divided by the population (Item 5) and multiplied by 1,000

Table IV-5 compares the levels of service for other Florida counties as well as the state of Florida. The LOS is displayed in terms of permanent population for 2013 for the service area of all entities.

**Table IV-5
Level-of-Service Comparison**

| Jurisdiction | Service Area Population (2013) ⁽¹⁾ | Number of Stations ⁽²⁾ | Residents per Station ⁽³⁾ |
|------------------------------------|---|-----------------------------------|--------------------------------------|
| Pasco County | 432,770 | 27 | 16,029 |
| Polk County | 381,496 | 32 | 11,922 |
| Collier County | 333,663 | 28 | 11,917 |
| City of North Port | 59,231 | 5 | 11,846 |
| Sarasota County | 247,767 | 22 | 11,262 |
| Lee County | 643,367 | 60 | 10,723 |
| Manatee County | 333,880 | 32 | 10,434 |
| Marion County | 270,338 | 27 | 10,013 |
| Charlotte County (Existing) | 146,592 | 16 | 9,162 |
| Desoto County | 26,827 | 3 | 8,942 |
| Martin County | 129,133 | 15 | 8,609 |
| Lake County | 155,998 | 21 | 7,428 |
| Indian River County | 92,382 | 13 | 7,106 |
| City of Venice | 21,117 | 3 | 7,039 |
| Brevard County | 206,365 | 33 | 6,253 |
| City of Punta Gorda | 17,087 | 3 | 5,696 |
| Florida | 19,259,543 | 2,050 | 9,395 |

(1) Source: BEBR, 2013 final population estimates

(2) Source: County websites and the U.S. Fire Administration, National Fire Department Census

(3) Service area population (Item 1) divided by number of stations (Item 2)

Cost Component

Table IV-6 summarizes the total current value of land, buildings, and equipment for fire and emergency medical services, including:

- Fourteen fire stations with a total asset value of \$19.4 million for buildings and land and \$18.3 million for vehicles and equipment, for a total asset value of \$37.7 million.

- Ten EMS stations with a total asset value of \$6.3 million for buildings and land and \$4.9 million for vehicles and equipment, for a total asset value of \$11.2 million.

Table IV-6 presents the total impact cost per functional resident for fire and EMS facilities in Charlotte County, which is calculated by multiplying the net asset value per station by the LOS (stations per 1,000 functional residents) and dividing that figure by 1,000.

**Table IV-6
Total Fire/EMS Facility Impact Cost per Resident**

| Description | Figure | Percent of Total Value ⁽⁷⁾ |
|---|---------------------|---------------------------------------|
| <i>Fire (excluding Englewood Fire District):</i> | | |
| Building Value ⁽¹⁾ | \$18,369,630 | 48.73% |
| Land Value ⁽¹⁾ | \$1,065,600 | 2.83% |
| Vehicle & Equipment Value ⁽²⁾ | \$18,258,987 | 48.44% |
| Total Asset Value | \$37,694,217 | 100.00% |
| Number of Stations ⁽³⁾ | 14 | |
| Cost per Station ⁽⁴⁾ | \$2,692,444 | |
| Level-of-Service (Stations per 1,000 Functional Residents) ⁽⁵⁾ | 0.115 | |
| Total Impact Cost per Resident ⁽⁶⁾ | \$309.63 | |
| <i>EMS:</i> | | |
| Building Value ⁽¹⁾ | \$5,830,420 | 52.16% |
| Land Value ⁽¹⁾ | \$427,800 | 3.83% |
| Vehicle & Equipment Value ⁽²⁾ | \$4,919,134 | 44.01% |
| Total Asset Value | \$11,177,354 | 100.00% |
| Number of Stations ⁽³⁾ | 10 | |
| Cost per Station ⁽⁴⁾ | \$1,117,735 | |
| Level-of-Service (Stations per 1,000 Functional Residents) ⁽⁵⁾ | 0.060 | |
| Total Impact Cost per Resident ⁽⁶⁾ | \$67.06 | |

(1) Source: Table IV-1

(2) Source: Tables IV-2 and IV-3

(3) Source: Table IV-4

(4) Total asset value divided by the number of stations (Item 3) for fire and EMS, respectively

(5) Source: Table IV-4

(6) Cost per station (Item 4) multiplied by the LOS (Item 5) and divided by 1,000 for fire and EMS, respectively

(7) Distribution of building, land, and vehicle/equipment values for fire and EMS, respectively

Credit Component

To avoid overcharging new development for the fire/EMS impact fee, a review of the capital financing program for fire/EMS services was completed. The purpose of this review was to determine any potential revenue credits generated by new development that are being used for expansion of capital facilities, land, vehicles, and equipment included in the inventory. It should be noted that the credit component does not include any capital renovation, maintenance, or operations expenses, as these types of expenditures cannot be funded with impact fee revenue.

Capital Expansion Expenditure Credit

To calculate the capital expansion expenditure credit per functional resident, the historical capital expansion projects and those programmed in the CIP are reviewed. During the time period from 2009 through 2019, the County allocated an average annual non-impact fee funding of \$57,000 toward fire capital facilities and \$28,000 toward EMS capital facilities. The annual capital expansion expenditures for both fire and EMS were divided by the average functional residents for the same period in order to calculate the average capital expansion cost per functional resident.

As presented in Table IV-7, the result is an average annual expansion cost of \$0.47 per functional resident for fire and \$0.17 per functional resident for EMS.

**Table IV-7
Fire/EMS Facility Capacity Expansion Funding**

| Expenditure ⁽¹⁾ | FY 2009 to FY 2013 | FY 2014 | FY 2015 | FY 2016 | FY 2017 | FY 2018 | FY 2019 | Total |
|---|-----------------------|------------------|--------------|------------------|------------|------------|------------|------------------|
| Fire: | | | | | | | | |
| Ad Valorem and Communication Fund: | | | | | | | | |
| Public Radio System Upgrade | \$53,906 | \$113,670 | \$743 | \$0 | \$0 | \$0 | \$0 | \$168,319 |
| New Life Pack 12 (3 units) | \$0 | \$48,674 | \$0 | \$0 | \$0 | \$0 | \$0 | \$48,674 |
| P25 Digital Communications System | \$0 | \$0 | \$0 | \$411,750 | \$0 | \$0 | \$0 | \$411,750 |
| Total Capital Expenditures | \$53,906 | \$162,344 | \$743 | \$411,750 | \$0 | \$0 | \$0 | \$628,743 |
| Average Annual Capital Expenditures (Fire)⁽²⁾ | | | | | | | | \$57,158 |
| Average Functional Population⁽³⁾ | | | | | | | | 122,306 |
| Average Annual Capital Expansion Expenditures (Fire) per Functional Resident⁽⁴⁾ | | | | | | | | \$0.47 |
| EMS: | | | | | | | | |
| Ad Valorem and Communication Fund: | | | | | | | | |
| Public Radio System Upgrade | \$17,969 | \$37,890 | \$248 | \$0 | \$0 | \$0 | \$0 | \$56,107 |
| Mobile Technology | \$95,171 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$95,171 |
| New Life Pack 12 (3 units) | \$0 | \$23,974 | \$0 | \$0 | \$0 | \$0 | \$0 | \$23,974 |
| P25 Digital Communications System | \$0 | \$0 | \$0 | \$137,250 | \$0 | \$0 | \$0 | \$137,250 |
| Total Capital Expenditures | \$113,140 | \$61,864 | \$248 | \$137,250 | \$0 | \$0 | \$0 | \$312,502 |
| Average Annual Capital Expenditures (EMS)⁽²⁾ | | | | | | | | \$28,409 |
| Average Functional Population⁽³⁾ | | | | | | | | 168,046 |
| Average Annual Capital Expansion Expenditures (EMS) per Functional Resident⁽⁴⁾ | | | | | | | | \$0.17 |

(1) Source: Charlotte County. Only the expansion portion of the project is included.

(2) Total capital expansion expenditures divided by 11 years for fire and EMS, respectively

(3) Source: Appendix A, Table A-10. Average annual population for the 11-year time period

(4) Average annual capital expansion expenditures (Item 2) divided by average functional population (Item 3) for fire and EMS, respectively

Net Fire/Emergency Medical Services Impact Cost

The net impact fee per functional resident is the difference between the cost component and the credit component. Table IV-8 summarizes the calculation of the net Fire/EMS impact cost per functional resident.

The first section of this table identifies the total impact cost as \$310 per functional resident for fire facilities and \$67 per functional resident for EMS facilities. The second section of the table identifies the revenue credits for the fire and EMS emergency services based on the historical and planned improvements from Table IV-7. The net impact cost per functional resident is the difference between the total impact cost and the total revenue credit. This results in a net impact cost of \$302 per functional resident for fire facilities and \$64 per functional resident for EMS facilities.

**Table IV-8
Net Impact Cost per Functional Resident**

| Impact Cost / Credit Element | Fire (excluding Englewood Fire District) | | EMS | |
|--|--|-----------------|-------------|-----------------|
| | Impact Cost | Revenue Credits | Impact Cost | Revenue Credits |
| Impact Cost | | | | |
| Total Impact Cost per Functional Resident ⁽¹⁾ | \$309.63 | - | \$67.06 | - |
| Revenue Credit | | | | |
| Avg Annual Capital Improvement Credit per Functional Resident ⁽²⁾ | | \$0.47 | - | \$0.17 |
| Capitalization Rate | | 4.0% | - | 4.0% |
| Capitalization Period (in years) | | 25 | - | 25 |
| Capital Improvement Credit per Resident ⁽³⁾ | | \$7.34 | - | \$2.66 |
| Net Impact Cost | | | | |
| Net Impact Cost per Functional Resident ⁽⁴⁾ | \$302.29 | - | \$64.40 | - |

(1) Source: Table IV-6

(2) Source: Table IV-7

(3) Average annual capital improvement credit per functional resident (Item 2) with a capitalization rate of 4.0% for 25 years

(4) Total impact cost per functional resident (Item 1) less the total revenue credit per functional resident (Item 3) for fire and EMS, respectively

Calculated Fire/Emergency Medical Services Impact Fee Schedule

Table IV-9 presents the calculated fire impact fee schedule developed for Charlotte County for both residential and non-residential land uses, based on the net impact cost per functional resident for fire (\$302) previously presented in Table IV-8. These fees will only apply to development in the unincorporated county and outside of the Englewood Fire District.

Table IV-10 presents the calculated emergency medical services impact fee schedule for Charlotte County for both residential and non-residential and uses, based on the net impact cost per functional resident for EMS (\$64) previously presented in Table IV-8. These fees will apply to development countywide, including Punta Gorda and the Englewood Fire District.

Table IV-11 presents the combined fire and EMS fee rates that will be charged to development in the unincorporated county, outside of the Englewood Fire District. The County will only charge the EMS fee, presented in Table IV-10, to development within Punta Gorda or the Englewood Fire District.

Fire/Emergency Medical Services Impact Fee Schedule Comparison

As part of the work effort in updating Charlotte County's fire and EMS impact fee program, a comparison of impact fee schedules was completed for other Florida counties. Table IV-12 presents this comparison. The fees shown for Charlotte County are applicable to development in the unincorporated county, outside of the Englewood Fire District, only.

**Table IV-9
Calculated Fire Impact Fee Schedule**

| ITE LUC | Land Use | Impact Unit | Functional Resident Coefficient ⁽¹⁾ | Calculated Impact Fee ⁽²⁾ | Administrative Fee @2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ |
|----------------------|--|-------------|--|--------------------------------------|--|---------------------------------|
| RESIDENTIAL: | | | | | | |
| 210 | Single Family (Detached) | du | 1.52 | \$459.48 | \$11.30 | \$471 |
| 220/230 | Multi-Family/Single Family Attached | du | 0.81 | \$244.85 | \$6.02 | \$251 |
| 240 | Mobile Home | du | 0.83 | \$250.90 | \$6.17 | \$257 |
| 253 | Congregate Care Facility | du | 0.87 | \$262.99 | \$6.47 | \$269 |
| LODGING: | | | | | | |
| 310 | Hotel | room | 0.55 | \$166.26 | \$4.09 | \$170 |
| 320 | Motel | room | 0.51 | \$154.17 | \$3.79 | \$158 |
| RECREATION: | | | | | | |
| 416 | RV Park | site | 0.50 | \$151.15 | \$3.72 | \$155 |
| 420 | Marina | boat berth | 0.19 | \$57.44 | \$1.41 | \$59 |
| 430 | Golf Course | hole | 1.08 | \$326.47 | \$8.03 | \$335 |
| 444 | Movie Theater w/Matinee | 1,000 sf | 5.98 | \$1,807.69 | \$44.47 | \$1,852 |
| 492 | Health/Fitness Club | 1,000 sf | 3.09 | \$934.08 | \$22.98 | \$957 |
| INSTITUTIONS: | | | | | | |
| 520 | Elementary School (Private) | student | 0.06 | \$18.14 | \$0.45 | \$19 |
| 522 | Middle School (Private) | student | 0.07 | \$21.16 | \$0.52 | \$22 |
| 530 | High School (Private) | student | 0.08 | \$24.18 | \$0.59 | \$25 |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | 0.10 | \$30.23 | \$0.74 | \$31 |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | 0.07 | \$21.16 | \$0.52 | \$22 |
| 560 | Church | 1,000 sf | 0.51 | \$154.17 | \$3.79 | \$158 |
| 565 | Day Care | 1,000 sf | 0.89 | \$269.04 | \$6.62 | \$276 |
| 610 | Hospital | 1,000 sf | 1.37 | \$414.14 | \$10.19 | \$424 |
| 620 | Nursing Home | 1,000 sf | 1.72 | \$519.94 | \$12.79 | \$533 |
| OFFICE: | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | 1.19 | \$359.73 | \$8.85 | \$369 |
| | General Office 100,001-200,000 sf | 1,000 sf | 1.01 | \$305.31 | \$7.51 | \$313 |
| | General Office 200,001-400,000 sf | 1,000 sf | 0.85 | \$256.95 | \$6.32 | \$263 |
| | General Office greater than 400,000 sf | 1,000 sf | 0.77 | \$232.76 | \$5.73 | \$238 |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | 1.14 | \$344.61 | \$8.48 | \$353 |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 1.74 | \$525.98 | \$12.94 | \$539 |
| RETAIL: | | | | | | |
| 820 | Retail 100,000 sfgla or less | 1,000 sfgla | 2.11 | \$637.83 | \$15.69 | \$654 |
| | Retail 100,001-200,000 sfgla | 1,000 sfgla | 2.12 | \$640.85 | \$15.76 | \$657 |
| | Retail 200,001-400,000 sfgla | 1,000 sfgla | 2.34 | \$707.36 | \$17.40 | \$725 |
| | Retail greater than 400,000 sfgla | 1,000 sfgla | 2.44 | \$737.59 | \$18.14 | \$756 |
| 841 | New/Used Auto Sales | 1,000 sf | 1.47 | \$444.37 | \$10.93 | \$455 |
| 849 | Tire Superstore | service bay | 1.34 | \$405.07 | \$9.96 | \$415 |
| 850 | Supermarket | 1,000 sf | 2.05 | \$619.69 | \$15.24 | \$635 |
| 851 | Convenience Market (24 hour) | 1,000 sf | 5.47 | \$1,653.53 | \$40.68 | \$1,694 |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | 5.83 | \$1,762.35 | \$43.35 | \$1,806 |
| 862 | Home Improvement Superstore | 1,000 sf | 1.81 | \$547.14 | \$13.46 | \$561 |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | 1.96 | \$592.49 | \$14.58 | \$607 |
| 890 | Furniture Store | 1,000 sf | 0.23 | \$69.53 | \$1.71 | \$71 |
| 911 | Bank/Savings Walk-In | 1,000 sf | 2.23 | \$674.11 | \$16.58 | \$691 |
| 912 | Bank/Savings Drive-In | 1,000 sf | 2.28 | \$689.22 | \$16.95 | \$706 |
| 931 | Quality Restaurant | 1,000 sf | 6.82 | \$2,061.62 | \$50.72 | \$2,112 |
| 932 | High-Turnover Restaurant | 1,000 sf | 6.78 | \$2,049.53 | \$50.42 | \$2,100 |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | 8.90 | \$2,690.38 | \$66.18 | \$2,757 |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 5.80 | \$1,753.28 | \$43.13 | \$1,796 |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | 1.91 | \$577.37 | \$14.20 | \$592 |
| 947 | Self-Service Car Wash | service bay | 0.87 | \$262.99 | \$6.47 | \$269 |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | 7.15 | \$2,161.37 | \$53.17 | \$2,215 |
| INDUSTRIAL: | | | | | | |
| 110 | General Light Industrial | 1,000 sf | 0.69 | \$208.58 | \$5.13 | \$214 |
| 120 | General Heavy Industrial | 1,000 sf | 0.49 | \$148.12 | \$3.64 | \$152 |
| 140 | Manufacturing | 1,000 sf | 0.50 | \$151.15 | \$3.72 | \$155 |
| 150 | Warehousing | 1,000 sf | 0.28 | \$84.64 | \$2.08 | \$87 |
| 151 | Mini-Warehouse | 1,000 sf | 0.06 | \$18.14 | \$0.45 | \$19 |

- (1) Source: Appendix A, Table A-12 for residential land uses and A-13 for non-residential land uses
(2) Net impact cost per resident for Fire from Table IV-8 multiplied by the functional resident coefficient (Item 1)
(3) Source: Calculated at 2.46% of the calculated impact fee (Item 2)
(4) Sum of the net impact fee (Item 2) and the administrative fee (Item 3)

**Table IV-10
Calculated EMS Impact Fee Schedule**

| ITE LUC | Land Use | Impact Unit | Functional Resident Coefficient ⁽¹⁾ | Calculated Impact Fee ⁽²⁾ | Administrative Fee @2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ | Current Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
|----------------------|--|-------------|--|--------------------------------------|--|---------------------------------|-----------------------------------|-------------------------------|
| RESIDENTIAL: | | | | | | | | |
| 210 | Single Family (Detached) | du | 1.42 | \$91.45 | \$2.25 | \$94 | \$51 | 84% |
| 220/230 | Multi-Family/Single Family Attached | du | 0.75 | \$48.30 | \$1.19 | \$49 | \$34 | 44% |
| 240 | Mobile Home | du | 0.77 | \$49.59 | \$1.22 | \$51 | \$36 | 42% |
| 253 | Congregate Care Facility | du | 0.83 | \$53.45 | \$1.31 | \$55 | n/a | n/a |
| LODGING: | | | | | | | | |
| 310 | Hotel | room | 0.55 | \$35.42 | \$0.87 | \$36 | \$38 | -5% |
| 320 | Motel | room | 0.51 | \$32.84 | \$0.81 | \$34 | \$38 | -11% |
| RECREATION: | | | | | | | | |
| 416 | RV Park | site | 0.50 | \$32.20 | \$0.79 | \$33 | n/a | n/a |
| 420 | Marina | boat berth | 0.19 | \$12.24 | \$0.30 | \$13 | n/a | n/a |
| 430 | Golf Course | hole | 1.08 | \$69.55 | \$1.71 | \$71 | n/a | n/a |
| 444 | Movie Theater w/Matinee | 1,000 sf | 5.98 | \$385.11 | \$9.47 | \$395 | \$299 | 32% |
| 492 | Health/Fitness Club | 1,000 sf | 3.09 | \$199.00 | \$4.90 | \$204 | n/a | n/a |
| INSTITUTIONS: | | | | | | | | |
| 520 | Elementary School (Private) | student | 0.06 | \$3.86 | \$0.09 | \$4 | n/a | n/a |
| 522 | Middle School (Private) | student | 0.07 | \$4.51 | \$0.11 | \$5 | n/a | n/a |
| 530 | High School (Private) | student | 0.08 | \$5.15 | \$0.13 | \$5 | n/a | n/a |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | 0.10 | \$6.44 | \$0.16 | \$7 | n/a | n/a |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | 0.07 | \$4.51 | \$0.11 | \$5 | n/a | n/a |
| 560 | Church | 1,000 sf | 0.51 | \$32.84 | \$0.81 | \$34 | \$20 | 70% |
| 565 | Day Care | 1,000 sf | 0.89 | \$57.32 | \$1.41 | \$59 | \$40 | 48% |
| 610 | Hospital | 1,000 sf | 1.37 | \$88.23 | \$2.17 | \$90 | \$48 | 88% |
| 620 | Nursing Home | 1,000 sf | 1.72 | \$110.77 | \$2.72 | \$113 | \$22 | 414% |
| OFFICE: | | | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | 1.19 | \$76.64 | \$1.89 | \$79 | \$31 | 155% |
| | General Office 100,001-200,000 sf | 1,000 sf | 1.01 | \$65.04 | \$1.60 | \$67 | \$29 | 131% |
| | General Office 200,001-400,000 sf | 1,000 sf | 0.85 | \$54.74 | \$1.35 | \$56 | \$28 | 100% |
| | General Office greater than 400,000 sf | 1,000 sf | 0.77 | \$49.59 | \$1.22 | \$51 | \$26 | 96% |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | 1.14 | \$73.42 | \$1.81 | \$75 | \$43 | 74% |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 1.74 | \$112.06 | \$2.76 | \$115 | \$43 | 167% |
| RETAIL: | | | | | | | | |
| 820 | Retail 100,000 sfgla or less | 1,000 sfgla | 2.11 | \$135.88 | \$3.34 | \$139 | \$36 | 286% |
| | Retail 100,001-200,000 sfgla | 1,000 sfgla | 2.12 | \$136.53 | \$3.36 | \$140 | \$49 | 186% |
| | Retail 200,001-400,000 sfgla | 1,000 sfgla | 2.34 | \$150.70 | \$3.71 | \$154 | \$66 | 133% |
| | Retail greater than 400,000 sfgla | 1,000 sfgla | 2.44 | \$157.14 | \$3.87 | \$161 | \$60 | 168% |
| 841 | New/Used Auto Sales | 1,000 sf | 1.47 | \$94.67 | \$2.33 | \$97 | \$84 | 15% |
| 849 | Tire Superstore | service bay | 1.34 | \$86.30 | \$2.12 | \$88 | n/a | n/a |
| 850 | Supermarket | 1,000 sf | 2.05 | \$132.02 | \$3.25 | \$135 | n/a | n/a |
| 851 | Convenience Market (24 hour) | 1,000 sf | 5.47 | \$352.27 | \$8.67 | \$361 | \$159 | 127% |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | 5.83 | \$375.45 | \$9.24 | \$385 | \$159 | 142% |
| 862 | Home Improvement Superstore | 1,000 sf | 1.81 | \$116.56 | \$2.87 | \$119 | n/a | n/a |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | 1.96 | \$126.22 | \$3.11 | \$129 | \$32 | 303% |
| 890 | Furniture Store | 1,000 sf | 0.23 | \$14.81 | \$0.36 | \$15 | n/a | n/a |
| 911 | Bank/Savings Walk-In | 1,000 sf | 2.23 | \$143.61 | \$3.53 | \$147 | \$63 | 133% |
| 912 | Bank/Savings Drive-In ⁽⁷⁾ | 1,000 sf | 2.28 | \$146.83 | \$3.61 | \$150 | \$69 | 117% |
| 931 | Quality Restaurant | 1,000 sf | 6.82 | \$439.21 | \$10.80 | \$450 | \$159 | 183% |
| 932 | High-Turnover Restaurant | 1,000 sf | 6.78 | \$436.63 | \$10.74 | \$447 | \$197 | 127% |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | 8.90 | \$573.16 | \$14.10 | \$587 | \$197 | 198% |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 5.80 | \$373.52 | \$9.19 | \$383 | \$73 | 425% |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | 1.91 | \$123.00 | \$3.03 | \$126 | \$12 | 950% |
| 947 | Self-Service Car Wash | service bay | 0.87 | \$56.03 | \$1.38 | \$57 | n/a | n/a |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | 7.15 | \$460.46 | \$11.33 | \$472 | \$159 | 197% |
| INDUSTRIAL: | | | | | | | | |
| 110 | General Light Industrial | 1,000 sf | 0.69 | \$44.44 | \$1.09 | \$46 | \$18 | 156% |
| 120 | General Heavy Industrial | 1,000 sf | 0.49 | \$31.56 | \$0.78 | \$32 | \$18 | 78% |
| 140 | Manufacturing | 1,000 sf | 0.50 | \$32.20 | \$0.79 | \$33 | \$18 | 83% |
| 150 | Warehousing | 1,000 sf | 0.28 | \$18.03 | \$0.44 | \$18 | \$8 | 125% |
| 151 | Mini-Warehouse | 1,000 sf | 0.06 | \$3.86 | \$0.09 | \$4 | \$4 | 0% |

- (1) Source: Appendix A, Table A-11 for residential land uses and A-13 for non-residential land uses
(2) Net impact cost per resident for EMS from Table IV-8 multiplied by the functional resident coefficient (Item 1)
(3) Source: Calculated at 2.46% of the calculated impact fee (Item 2)
(4) Sum of the net impact fee (Item 2) and the administrative fee (Item 3)
(5) Source: Charlotte County Community Development Department; Includes a 2.46% administrative charge; Fee is currently suspended
(6) Percent change from the current adopted fee rate (Item 5) to the total impact fee (Item 4)
(7) The current adopted fee rate (Item 5) is charged "per lane"

**Table IV-11
Calculated Fire/EMS Impact Fee Schedule**

| ITE LUC | Land Use | Impact Unit | Fire Impact Fee ⁽¹⁾ | EMS Impact Fee ⁽²⁾ | Administrative Fee @2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ | Current Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
|----------------------|--|-------------|--------------------------------|-------------------------------|--|---------------------------------|-----------------------------------|-------------------------------|
| RESIDENTIAL: | | | | | | | | |
| 210 | Single Family (Detached) | du | \$459.48 | \$91.45 | \$13.55 | \$564 | \$171 | 230% |
| 220/230 | Multi-Family/Single Family Attached | du | \$244.85 | \$48.30 | \$7.21 | \$300 | \$114 | 163% |
| 240 | Mobile Home | du | \$250.90 | \$49.59 | \$7.39 | \$308 | \$122 | 152% |
| 253 | Congregate Care Facility | du | \$262.99 | \$53.45 | \$7.78 | \$324 | n/a | n/a |
| LODGING: | | | | | | | | |
| 310 | Hotel | room | \$166.26 | \$35.42 | \$4.96 | \$207 | \$132 | 57% |
| 320 | Motel | room | \$154.17 | \$32.84 | \$4.60 | \$192 | \$132 | 45% |
| RECREATION: | | | | | | | | |
| 416 | RV Park | site | \$151.15 | \$32.20 | \$4.51 | \$188 | n/a | n/a |
| 420 | Marina | boat berth | \$57.44 | \$12.24 | \$1.71 | \$71 | n/a | n/a |
| 430 | Golf Course | hole | \$326.47 | \$69.55 | \$9.74 | \$406 | n/a | n/a |
| 444 | Movie Theater w/Matinee | 1,000 sf | \$1,807.69 | \$385.11 | \$53.94 | \$2,247 | \$1,013 | 122% |
| 492 | Health/Fitness Club | 1,000 sf | \$934.08 | \$199.00 | \$27.87 | \$1,161 | n/a | n/a |
| INSTITUTIONS: | | | | | | | | |
| 520 | Elementary School (Private) | student | \$18.14 | \$3.86 | \$0.54 | \$23 | n/a | n/a |
| 522 | Middle School (Private) | student | \$21.16 | \$4.51 | \$0.63 | \$26 | n/a | n/a |
| 530 | High School (Private) | student | \$24.18 | \$5.15 | \$0.72 | \$30 | n/a | n/a |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | \$30.23 | \$6.44 | \$0.90 | \$38 | n/a | n/a |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | \$21.16 | \$4.51 | \$0.63 | \$26 | n/a | n/a |
| 560 | Church | 1,000 sf | \$154.17 | \$32.84 | \$4.60 | \$192 | \$65 | 195% |
| 565 | Day Care | 1,000 sf | \$269.04 | \$57.32 | \$8.03 | \$334 | \$138 | 142% |
| 610 | Hospital | 1,000 sf | \$414.14 | \$88.23 | \$12.36 | \$515 | \$161 | 220% |
| 620 | Nursing Home | 1,000 sf | \$519.94 | \$110.77 | \$15.52 | \$646 | \$71 | 810% |
| OFFICE: | | | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | \$359.73 | \$76.64 | \$10.73 | \$447 | \$108 | 314% |
| | General Office 100,001-200,000 sf | 1,000 sf | \$305.31 | \$65.04 | \$9.11 | \$379 | \$97 | 291% |
| | General Office 200,001-400,000 sf | 1,000 sf | \$256.95 | \$54.74 | \$7.67 | \$319 | \$94 | 239% |
| | General Office greater than 400,000 sf | 1,000 sf | \$232.76 | \$49.59 | \$6.95 | \$289 | \$90 | 221% |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | \$344.61 | \$73.42 | \$10.28 | \$428 | \$148 | 189% |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | \$525.98 | \$112.06 | \$15.70 | \$654 | \$148 | 342% |
| RETAIL: | | | | | | | | |
| 820 | Retail 100,000 sfgla or less | 1,000 sfgla | \$637.83 | \$135.88 | \$19.03 | \$793 | \$120 | 561% |
| | Retail 100,001-200,000 sfgla | 1,000 sfgla | \$640.85 | \$136.53 | \$19.12 | \$797 | \$165 | 383% |
| | Retail 200,001-400,000 sfgla | 1,000 sfgla | \$707.36 | \$150.70 | \$21.11 | \$879 | \$225 | 291% |
| | Retail greater than 400,000 sfgla | 1,000 sfgla | \$737.59 | \$157.14 | \$22.01 | \$917 | \$207 | 343% |
| 841 | New/Used Auto Sales | 1,000 sf | \$444.37 | \$94.67 | \$13.26 | \$552 | \$282 | 96% |
| 849 | Tire Superstore | service bay | \$405.07 | \$86.30 | \$12.09 | \$503 | n/a | n/a |
| 850 | Supermarket | 1,000 sf | \$619.69 | \$132.02 | \$18.49 | \$770 | n/a | n/a |
| 851 | Convenience Market (24 hour) | 1,000 sf | \$1,653.53 | \$352.27 | \$49.34 | \$2,055 | \$537 | 283% |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | \$1,762.35 | \$375.45 | \$52.59 | \$2,190 | \$537 | 308% |
| 862 | Home Improvement Superstore | 1,000 sf | \$547.14 | \$116.56 | \$16.33 | \$680 | n/a | n/a |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | \$592.49 | \$126.22 | \$17.68 | \$736 | \$109 | 575% |
| 890 | Furniture Store | 1,000 sf | \$69.53 | \$14.81 | \$2.07 | \$86 | n/a | n/a |
| 911 | Bank/Savings Walk-In | 1,000 sf | \$674.11 | \$143.61 | \$20.12 | \$838 | \$212 | 295% |
| 912 | Bank/Savings Drive-In ⁽⁷⁾ | 1,000 sf | \$689.22 | \$146.83 | \$20.57 | \$857 | \$234 | 266% |
| 931 | Quality Restaurant | 1,000 sf | \$2,061.62 | \$439.21 | \$61.52 | \$2,562 | \$536 | 378% |
| 932 | High-Turnover Restaurant | 1,000 sf | \$2,049.53 | \$436.63 | \$61.16 | \$2,547 | \$669 | 281% |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | \$2,690.38 | \$573.16 | \$80.28 | \$3,344 | \$669 | 400% |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | \$1,753.28 | \$373.52 | \$52.32 | \$2,179 | \$245 | 789% |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | \$577.37 | \$123.00 | \$17.23 | \$718 | \$41 | 1651% |
| 947 | Self-Service Car Wash | service bay | \$262.99 | \$56.03 | \$7.85 | \$327 | n/a | n/a |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | \$2,161.37 | \$460.46 | \$64.50 | \$2,686 | \$537 | 400% |
| INDUSTRIAL: | | | | | | | | |
| 110 | General Light Industrial | 1,000 sf | \$208.58 | \$44.44 | \$6.22 | \$259 | \$59 | 339% |
| 120 | General Heavy Industrial | 1,000 sf | \$148.12 | \$31.56 | \$4.42 | \$184 | \$59 | 212% |
| 140 | Manufacturing | 1,000 sf | \$151.15 | \$32.20 | \$4.51 | \$188 | \$59 | 219% |
| 150 | Warehousing | 1,000 sf | \$84.64 | \$18.03 | \$2.53 | \$105 | \$31 | 239% |
| 151 | Mini-Warehouse | 1,000 sf | \$18.14 | \$3.86 | \$0.54 | \$23 | \$12 | 92% |

(1) Source: Table IV-9, Item 2

(2) Source: Table IV-10, Item 2

(3) Source: Calculated at 2.46% of the sum of the fire impact fee (Item 1) and the EMS impact fee (Item 2)

(4) Sum of the fire impact fee (Item 1), the EMS impact fee (Item 2), and the administrative fee (Item 3)

(5) Source: Charlotte County Community Development Department; Includes a 2.46% administrative charge; Fee is currently suspended

(6) Percent change from the current adopted fee rate (Item 5) to the total impact fee (Item 4)

(7) The current adopted fee rate (Item 5) is charged "per 1,000 sf"

(8) The current adopted fee rate (Item 5) is charged "per lane"

**Table IV-12
Fire/Emergency Medical Services Impact Fee Schedule Comparison**

| Land Use | Unit ⁽²⁾ | Charlotte County | | Polk County ⁽⁵⁾ | Pasco County ⁽⁶⁾ | Collier County ⁽⁷⁾ | Lake County ⁽⁸⁾ | Lee County ⁽⁹⁾ | Martin County ⁽¹⁰⁾ | Indian River County ⁽¹¹⁾ | Marion County ⁽¹²⁾ | Manatee County ⁽¹³⁾ | Sarasota County ⁽¹⁴⁾ | Brevard County ⁽¹⁵⁾ | Desoto County ⁽¹⁶⁾ | City of Punta Gorda ⁽¹⁷⁾ | City of North Port ⁽¹⁸⁾ |
|-----------------------------|---------------------|---------------------------|-------------------------|----------------------------|-----------------------------|-------------------------------|----------------------------|---------------------------|-------------------------------|-------------------------------------|-------------------------------|--------------------------------|---------------------------------|--------------------------------|-------------------------------|-------------------------------------|------------------------------------|
| | | Calculated ⁽³⁾ | Existing ⁽⁴⁾ | | | | | | | | | | | | | | |
| Date of Last Update | - | 2014 | 2009 | 2009 | 2003 | 2010 | 2003 | 2011 | 2012 | 2005/14 | 2005 | 2011 | 2007 | 2001 | 2006 | 2006 | 2011 |
| Adoption % ⁽¹⁾ | - | 100% | 100% | 50% | 100% | 100% | 95% | 91% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 42% |
| Residential: | | | | | | | | | | | | | | | | | |
| Single Family (2,000 sq ft) | du | \$564 | \$171 | \$126 | \$420 | \$1,065 | \$390 | \$375 | \$608 | \$285 | \$287 | \$319 | \$347 | \$93 | \$313 | \$197 | \$207 |
| Non-Residential: | | | | | | | | | | | | | | | | | |
| Light Industrial | 1,000 sf | \$259 | \$59 | \$20 | \$549 | \$676 | \$104 | \$105 | \$12 | \$142 | \$119 | \$76 | \$108 | n/a | \$190 | \$48 | \$82 |
| Office (50,000 sq ft) | 1,000 sf | \$447 | \$108 | \$125 | \$549 | \$725 | \$1,301 | \$206 | \$81 | \$206 | \$209 | \$133 | \$182 | \$44 | \$320 | \$112 | \$167 |
| Retail (125,000 sq ft) | 1,000 sf | \$797 | \$165 | \$149 | \$549 | \$795 | \$1,301 | \$441 | \$324 | \$489 | \$505 | \$128 | \$452 | \$129 | \$180 | \$250 | \$252 |
| Bank w/Drive-In | 1,000 sf | \$857 | \$234 | \$149 | \$549 | \$783 | \$1,301 | \$441 | \$81 | \$470 | \$372 | \$128 | \$452 | \$105 | \$230 | \$350 | \$269 |
| Fast Food w/Drive-Thru | 1,000 sf | \$3,344 | \$669 | \$149 | \$549 | \$1,233 | \$1,301 | \$441 | \$584 | \$1,837 | \$2,081 | \$128 | \$452 | \$552 | \$230 | \$481 | \$1,063 |

- (1) Represents the portion of the maximum calculated fee that was originally adopted
- (2) du = dwelling unit
- (3) Source: Table VI-11
- (4) Source: Charlotte County Community Development Department; Includes 2.46% administrative charge; Bank w/Drive-in is measured "per lane"; Fee is currently suspended
- (5) Source: Polk County Building & Construction Department; Fire and EMS fees are combined; Fee is currently suspended through July 2015
- (6) Source: Pasco County Central Permitting Department; Fire combat and fire rescue combined
- (7) Source: Collier County Impact Fee Administration Department; Fees shown include the EMS fee and an average fire fee across all districts
- (8) Source: Lake County Growth Management Department, Development Processing Division
- (9) Source: Lee County Community Development Department; Fees include 1.0% administrative fee
- (10) Source: Martin County Growth Management Department; Fees include 1.5% administrative fee
- (11) Source: Indian River County Planning Division; Fees include 2.5% administrative fee. IRC is in the process of updating its impact fee program. The County adopted the calculated non-residential impact fees in April of 2014 and is finalizing the calculations for residential land uses. Non-residential fees were adopted at 100%.
- (12) Source: Marion County Planning Department; Fee is currently suspended through December 2014
- (13) Source: Manatee County Financial Management Department, Impact Fee Administration
- (14) Source: Sarasota County Planning & Development Services; Fire and EMS combined; Fees include 2.25% administrative fee
- (15) Source: Brevard County Planning & Development Department; Fire/Rescue and EMS rates are combined; Industrial land used are exempt from impact fees
- (16) Source: Desoto County Planning & Zoning Department; Fee is currently suspended through November 2014
- (17) Source: City of Punta Gorda Zoning Department; City collects its own fire fee and 100% of the County's EMS fee. Both City and County fees are currently suspended
- (18) Source: City of North Port Economic Development Department

V. Law Enforcement & Correctional Facilities

Law enforcement/correctional facilities impact fees are typically used to fund the capital construction and expansion of land, facilities and capital equipment required to support the additional law enforcement and correctional facility service demand created by new growth. In the case of Charlotte County's impact fee program, law enforcement and correctional facilities are combined under the same impact fee program. More often, these two services are charged separately under two different impact fee program areas. In addition, the County's current adopted fee includes only the vehicles and equipment associated with law enforcement services in the impact fee and the buildings and land are included in the public buildings impact fee. In an effort to combine related assets together, this study includes all capital assets related to law enforcement and correctional facilities in the same program area. This section of the report presents the results of the law enforcement/correctional facilities impact fee update study for Charlotte County and will serve as the technical support document for the calculated impact fee schedule.

There are several major elements associated with the development of the law enforcement & correctional facilities impact fee. These include:

- Facility Inventory
- Service Area and Population
- Level-of-Service
- Cost Component
- Credit Component
- Net Law Enforcement/Correctional Facilities Impact Cost
- Calculated Law Enforcement/Correctional Facilities Impact Fee Schedule
- Law Enforcement/Correctional Facilities Impact Fee Schedule Comparison

Facility Inventory

The facility inventory includes law enforcement and correctional facilities and does not include any of the buildings included in the calculation of other impact fees.

According to the information provided by Charlotte County, the County has approximately 400,000 square feet of law/corrections facility space. This includes the square footage of

both primary and support buildings. Support facilities are defined as trailers, facilities without air-conditioning, or facilities that are unlikely to be occupied by personnel.

Table V-1 shows a summary of the law enforcement and correctional facilities inventory and the current value of buildings and land. As presented, the inventory includes a total of 382,000 square feet of primary building space and 18,000 square feet of support space. The building value of the facilities included in the inventory were estimated based on insurance values, estimates for future buildings, and cost information obtained from other jurisdictions. This analysis resulted in an estimated cost of \$250 per square foot for correctional facilities, \$200 per square foot for all other primary buildings, and \$75 per square foot for support buildings.

In addition to building value, land values were estimated for future land purchases. Land value was determined primarily through a review of the value of parcels where the current buildings are located, as reported by the Charlotte County Property Appraiser, an analysis of vacant land sales and values of 0.5- to 15-acre lots in Charlotte County, and discussions with the County representatives. This analysis resulted in an average land value of \$100,000 per acre. Additional information is included in Appendix B.

Table V-1
Summary of Law Enforcement and Correctional Facilities Inventory

| Building Type | Land | Square Feet ⁽¹⁾ | Building Value per Square Foot ⁽²⁾ | Building and Land Value ⁽³⁾ |
|--|-----------|----------------------------|---|--|
| Primary Buildings | | 381,968 | \$239 | \$91,159,200 |
| Support Buildings | | 18,460 | \$75 | \$1,384,500 |
| Total | | 400,428 | - | \$92,543,700 |
| Total Acreage ⁽⁴⁾ | 53.10 | | | - |
| Land Value per Acre ⁽⁵⁾ | \$100,000 | | | \$5,310,000 |
| Total Building and Land Value⁽⁶⁾ | | | | \$97,853,700 |

(1) Source: Appendix C, Table C-1

(2) Building value (Item 3) divided by square feet (Item 1)

(3) Primary buildings estimated at \$200 per square foot, except for the jail, which is estimated at \$250 per square foot. The average cost of support buildings is estimated at \$75 per square foot. Appendix B provides further detail.

(4) Source: Appendix C, Table C-2

(5) Source: Appendix B

(6) Sum of the total value (Item 3) for primary buildings, support buildings, and land

In addition for buildings and land, Charlotte County owns approximately \$20.4 million worth of vehicles and equipment associated with law enforcement, correctional facilities, and the court system. Using the current figure of 257 sworn officers, this resulted in a calculated cost of approximately \$79,000 per officer, as shown in Table V-2.

**Table V-2
Equipment and Vehicle Inventory**

| Equipment | Units ⁽¹⁾ | Average Unit Cost ⁽¹⁾ | Asset Value |
|--|----------------------|----------------------------------|---------------------|
| Law Enforcement | | | |
| Vehicles | 379 | \$21,952.62 | \$8,320,043 |
| Vehicle Related Equipment | 28 | \$5,110.00 | \$143,080 |
| Radio | 888 | \$2,661.00 | \$2,362,968 |
| Aircraft | 8 | \$25,050.00 | \$200,400 |
| Aircraft Related Equipment | 44 | \$13,190.00 | \$580,360 |
| Weapons | 716 | \$443.43 | \$317,496 |
| Building & Grounds Maintenance Equipment | 11 | \$3,823.00 | \$42,053 |
| Canine | 2 | \$6,800.00 | \$13,600 |
| Computer Equipment | 734 | \$3,999.00 | \$2,935,266 |
| Kitchen Equipment | 4 | \$2,727.00 | \$10,908 |
| Marine Equipment | 43 | \$10,000.00 | \$430,000 |
| Office Equipment | 8 | \$2,075.00 | \$16,600 |
| Office Furniture | 10 | \$1,337.62 | \$13,376 |
| Other Fixed Assets | 90 | \$3,190.07 | \$287,106 |
| Audio/Video Equipment | 137 | \$3,819.09 | \$523,215 |
| Radar | 117 | \$1,735.00 | \$202,995 |
| Shop Equipment | 2 | \$1,425.44 | \$2,851 |
| Physical Fitness Equipment | 25 | \$1,884.98 | \$47,125 |
| Uniforms | 273 | \$2,137.00 | \$583,401 |
| Duty Gear | 273 | \$1,079.00 | \$294,567 |
| Ballistic Vest | 273 | \$594.00 | \$162,162 |
| Subtotal -- Law Enforcement | 4,065 | | \$17,489,572 |
| Corrections | | | |
| Vehicles | 21 | \$24,172.20 | \$507,616 |
| Vehicle Related Equipment | 9 | \$8,445.00 | \$76,005 |
| Radio | 256 | \$2,587.00 | \$662,272 |
| Weapons | 55 | \$599.00 | \$32,945 |
| Building & Grounds Maintenance Equipment | 10 | \$3,495.00 | \$34,950 |
| Computer Equipment | 115 | \$3,127.96 | \$359,715 |
| Jail Equipment | 13 | \$3,397.00 | \$44,161 |
| Kitchen Equipment | 33 | \$6,500.00 | \$214,500 |
| Office Equipment | 6 | \$1,875.62 | \$11,254 |
| Other Fixed Assets | 8 | \$9,929.10 | \$79,433 |
| Audio/Video Equipment | 5 | \$10,710.00 | \$53,550 |
| Uniforms | 147 | \$2,137.00 | \$314,139 |
| Duty Gear | 147 | \$1,079.00 | \$158,613 |
| Subtotal -- Corrections | 825 | | \$2,549,153 |

**Table V-1 (continued)
Equipment and Vehicle Inventory**

| Equipment | Units ⁽¹⁾ | Average Unit Cost ⁽¹⁾ | Asset Value |
|---|----------------------|----------------------------------|---------------------|
| Courts | | | |
| Vehicles | 7 | \$21,361.30 | \$149,529 |
| Radio | 26 | \$2,587.00 | \$67,262 |
| Weapons | 35 | \$645.00 | \$22,575 |
| Computer Equipment | 13 | \$1,454.40 | \$18,907 |
| Audio/Video Equipment | 6 | \$6,435.52 | \$38,613 |
| Uniforms | 19 | \$2,137.00 | \$40,603 |
| Duty Gear | 19 | \$1,079.00 | \$20,501 |
| Ballistic Vest | 19 | \$594.00 | \$11,286 |
| Subtotal -- Courts | 144 | | \$369,276 |
| Total Vehicle and Equipment Cost | | | \$20,408,001 |
| # of Officers ⁽²⁾ | | | 257 |
| Cost per Officer | | | \$79,409 |

(1) Source: Charlotte County Sheriff's Office

(2) Source: Charlotte County Sheriff's Office; Current staffing of sworn officers

Service Area and Population

Charlotte County Sheriff provides law enforcement services in unincorporated county. In addition, the Sheriff's office provides support services to the City of Punta Gorda Police Department. Correctional facility services are provided countywide. Therefore, the proper benefit district for law enforcement and correctional facility services is the entire county, and the countywide weighted seasonal population is used in the impact fee calculations. In addition, because law enforcement and correctional facility services are provided to all land uses and all residents, visitors, and workers, the countywide "functional" population is calculated and used as well. Appendix A provides further information on population estimates.

Level-of-Service

Based on the information provided by Charlotte County, the 2014 level-of-service is 1.42 sworn officers per 1,000 weighted residents. Table V-3 presents the calculation of the existing LOS.

While the 2014 LOS is 1.42 officers per 1,000 weighted residents, in order to calculate the law enforcement impact fee, the LOS needs to be calculated in terms of officers per 1,000 functional residents. Table V-3 also illustrates the calculation of the current LOS using the total functional residents within the service area. The current LOS of law enforcement services is 1.53 officers per 1,000 functional residents.

**Table V-3
Level-of-Service (2014)**

| Component | Year 2014 | |
|---|---------------------|-----------------------|
| | Weighted Population | Functional Population |
| Population ⁽¹⁾ | 180,425 | 167,563 |
| Number of Officers -- Law Enforcement ⁽²⁾ | 257 | 257 |
| Residents per Officer ⁽³⁾ | 702 | 652 |
| LOS (officers per 1,000 residents)⁽⁴⁾ | 1.42 | 1.53 |

(1) Source: Appendix A, Table A-1 for weighted population and Table A-8 for functional population; Countywide population

(2) Source: Table V-1

(3) Population (Item 1) divided by the number of officers (Item 2)

(4) Number of officers (Item 2) divided by the population (Item 1) and multiplied by 1,000

Table V-4 summarizes a LOS comparison between Charlotte County and other Florida counties. The LOS is displayed in terms of permanent population for all jurisdictions because a functional population analysis has not been completed for these entities. The LOS comparison is based on the permanent population for 2012, as this is the most recent population data available for all jurisdictions. For consistency purposes, all data was retrieved from the FDLE Criminal Justice Agency Profile Report.

**Table V-4
Level-of-Service Comparison**

| Jurisdiction | Service Area Population (2012)⁽¹⁾ | Number of Officers⁽¹⁾ | LOS (Officers per 1,000 Residents)⁽²⁾ |
|------------------------------------|---|---|---|
| Collier County | 293,744 | 270 | 0.92 |
| Marion County | 269,657 | 256 | 0.95 |
| Pasco County | 430,872 | 424 | 0.98 |
| Lee County | 404,521 | 414 | 1.02 |
| Charlotte County (Existing) | 146,373 | 189 | 1.29 |
| Lake County | 165,664 | 215 | 1.30 |
| Manatee County | 259,732 | 339 | 1.31 |
| Sarasota County | 247,070 | 329 | 1.33 |
| Desoto County | 26,823 | 37 | 1.38 |
| Polk County | 398,796 | 560 | 1.40 |
| Martin County | 128,656 | 183 | 1.42 |
| Indian River County | 92,795 | 140 | 1.51 |
| City of North Port | 58,674 | 95 | 1.62 |
| City of Punta Gorda | 16,984 | 34 | 2.00 |
| City of Venice | 20,918 | 44 | 2.10 |
| Brevard County | 223,781 | 474 | 2.12 |

(1) Source: Florida Department of Law Enforcement Criminal Justice Agency Profile Report, 2012

(2) Permanent population (Item 1) divided by the number of officers (Item 2) and multiplied by 1,000

Cost Component

The cost component of the study evaluates the cost of buildings, land, and vehicles/equipment associated with law enforcement and correctional facilities. Table V-5 provides a summary of all capital costs, which amounts to approximately \$440,000 per sworn officer.

Table V-5 also presents the cost per functional resident for the impact fee analysis. This cost was calculated as the total capital cost of approximately \$440,000 per officer multiplied by the LOS of 1.53 officers per 1,000 functional residents divided by 1,000. As shown in the following table, the total impact cost per resident is approximately \$672 for law enforcement and correctional facilities.

**Table V-5
Total Impact Cost per Functional Resident**

| Component | Cost | Percent of Total Value⁽⁸⁾ |
|--|----------------------|---|
| Building Value ⁽¹⁾ | \$91,159,200 | 80.7% |
| Land Value ⁽¹⁾ | \$1,384,500 | 1.2% |
| Vehicle and Equipment Value ⁽²⁾ | <u>\$20,408,001</u> | <u>18.1%</u> |
| Total Asset Value⁽³⁾ | \$112,951,701 | 100.0% |
| Number of Law Enforcement Officers ⁽⁴⁾ | 257 | |
| Total Asset Value per Officer⁽⁵⁾ | \$439,501 | |
| Level-of-Service (Officers/1,000 Func. Residents) ⁽⁶⁾ | 1.53 | |
| Total Impact Cost per Functional Resident⁽⁷⁾ | \$672.44 | |

(1) Source: Table V-1

(2) Source: Table V-2

(3) Sum of building, land, and vehicle/equipment value

(4) Source: Table V-2

(5) Total asset value (Item 3) divided by the number of law enforcement officers (Item 4)

(6) Source: Table V-3

(7) Total asset value per officer (Item 5) multiplied by the LOS (Item 6) and divided by 1,000

(8) Distribution of building, land, and vehicle/equipment values as part of the total asset value

Credit Component

To avoid overcharging new development for the law enforcement and correctional facility impact fee, a review of the capital financing program for these services was completed. The purpose of this review was to determine potential revenues generated by new development that are being used for the purchase of vehicles and equipment included in the inventory. It should be noted that the credit component does not include any capital renovation, maintenance, or operations expenses, as these types of expenditures cannot be funded with impact fee revenue.

Capital Expansion Expenditure Credit

To calculate the capital expansion expenditure credit per functional resident, the historical capital expansion projects were reviewed. During the time period from 2009 through 2019, the County and Sheriff's Office allocated an average annual ad valorem revenues of \$2.5 million toward buildings, vehicles and equipment. The annual capital expansion expenditures were divided by the average functional residents for the same period in order to calculate the average capital expansion cost per functional resident. As presented in Table V-6, the result is an average annual expansion cost of \$15 per functional resident.

It is important to note one of revenues sources currently available to the County is the local government infrastructure surtax or local discretionary sales surtax, which is going to expire at the end of 2014. Historically, revenues from the sales tax were used for other program areas; however, if re-adopted in 2015, a portion of the revenues is expected to be allocated to law enforcement/correctional facility capacity projects. Given this, another credit scenario is calculated, which results in an average revenue credit of \$22 per functional resident.

TECHNICAL

**Table V-6
Law Enforcement/Correctional Facility Capital Expansion Funding**

| Description | FY 2009 to FY 2013 | FY 2014 | FY 2015 | FY 2016 | FY 2017 | FY 2018 | FY 2019 | Total |
|--|-----------------------|------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| Ad Valorem | | | | | | | | |
| Jail Expansion | \$26,305,133 | - | - | - | - | - | - | \$26,305,133 |
| Sheriff Firing Range/Training Center/District 3 HQ | - | - | \$168,750 | - | - | - | - | \$168,750 |
| Sheriff District 1 (West County) HQ | - | \$300,000 | - | - | - | - | - | \$300,000 |
| APC Symmetra UPS | \$0 | \$14,000 | - | - | - | - | - | \$14,000 |
| Ballistic Shield | \$6,200 | \$0 | - | - | - | - | - | \$6,200 |
| Binoculars | \$3,977 | \$0 | - | - | - | - | - | \$3,977 |
| Canine | \$13,300 | \$0 | - | - | - | - | - | \$13,300 |
| Car Video System | \$10,260 | \$0 | - | - | - | - | - | \$10,260 |
| Crime Scene Light Guide | \$2,176 | \$0 | - | - | - | - | - | \$2,176 |
| Dell Sonicwall | \$0 | \$15,000 | - | - | - | - | - | \$15,000 |
| Drysuit | \$3,400 | \$0 | - | - | - | - | - | \$3,400 |
| DVR | \$32,178 | \$0 | - | - | - | - | - | \$32,178 |
| Facemask | \$9,130 | \$0 | - | - | - | - | - | \$9,130 |
| Firewall | \$6,044 | \$0 | - | - | - | - | - | \$6,044 |
| Freezer | \$1,886 | \$0 | - | - | - | - | - | \$1,886 |
| Gym Equipment | \$33,779 | \$0 | - | - | - | - | - | \$33,779 |
| Handguns | \$8,180 | \$0 | - | - | - | - | - | \$8,180 |
| Light Bars | \$0 | \$51,700 | - | - | - | - | - | \$51,700 |
| Melon Peeler | \$1,146 | \$0 | - | - | - | - | - | \$1,146 |
| Metal Detector | \$6,794 | \$0 | - | - | - | - | - | \$6,794 |
| Multifunction Display | \$6,200 | \$0 | - | - | - | - | - | \$6,200 |
| Network Switch | \$37,037 | \$0 | - | - | - | - | - | \$37,037 |
| Night Vision Goggles | \$25,638 | \$0 | - | - | - | - | - | \$25,638 |
| Night Vision Scope | \$16,974 | \$0 | - | - | - | - | - | \$16,974 |
| Panasonic Toughbooks | \$0 | \$26,325 | - | - | - | - | - | \$26,325 |
| Pole | \$2,152 | \$0 | - | - | - | - | - | \$2,152 |
| Privacy Screen | \$3,398 | \$0 | - | - | - | - | - | \$3,398 |
| Radios | \$0 | \$118,525 | - | - | - | - | - | \$118,525 |
| Receiver | \$1,025 | \$0 | - | - | - | - | - | \$1,025 |
| Refrigerator | \$2,717 | \$0 | - | - | - | - | - | \$2,717 |
| Transmitter | \$4,512 | \$0 | - | - | - | - | - | \$4,512 |
| Vehicles | \$0 | \$163,800 | - | - | - | - | - | \$163,800 |
| Xio ISE-2 Storage | \$0 | \$110,000 | - | - | - | - | - | \$110,000 |
| Sales Tax | | | | | | | | |
| Sheriff Firing Range/Training Center/District 3 HQ ⁽²⁾ | - | - | \$98,550 | \$98,550 | \$98,550 | \$98,550 | \$98,550 | \$492,750 |
| Jail Expansion Ph. I | - | - | \$1,822,053 | \$1,822,053 | \$1,822,053 | \$1,822,053 | \$1,822,052 | \$9,110,264 |
| Sheriff District 1 (West County) HQ | - | - | \$608,000 | \$608,000 | \$608,000 | \$608,000 | \$608,000 | \$3,040,000 |
| Total (Ad Valorem & Sales Tax) | \$26,543,236 | \$799,350 | \$2,528,603 | \$2,528,603 | \$2,528,603 | \$2,528,603 | \$2,528,602 | \$39,985,600 |
| Total Law Enforcement/Correctional Facility Capital Expansion Expenditures per Year⁽³⁾ | | | | | | | | \$3,635,055 |
| Average Annual Functional Population⁽⁴⁾ | | | | | | | | 168,046 |
| Annual Law Enforcement/Correctional Facility Capacity Expansion Expenditures per Resident⁽⁵⁾ | | | | | | | | \$21.63 |
| Total (Ad Valorem ONLY) | \$26,543,236 | \$799,350 | \$168,750 | \$0 | \$0 | \$0 | \$0 | \$27,511,336 |
| Total Law Enforcement/Correctional Facility Capital Expansion Expenditures per Year⁽³⁾ | | | | | | | | \$2,501,031 |
| Average Annual Functional Population⁽⁴⁾ | | | | | | | | 168,046 |
| Annual Law Enforcement/Correctional Facility Capacity Expansion Expenditures per Resident⁽⁵⁾ | | | | | | | | \$14.88 |

(1) Source: Charlotte County Sheriff's Office and Charlotte County

(2) If the sales tax funding becomes available for this project it will replace the ad valorem spending. As such, the total ad valorem and sales tax revenue for FY 2015 includes only the sales tax funding

(3) Total capital expansion expenditures divided by 11 years

(4) Source: Average population from Appendix A, Table A-10 for 2009 through 2019

(5) Average annual expenditures (Item 3) divided by the average annual population (Item 4)

Net Law Enforcement and Correctional Facilities Impact Cost

The net impact fee per functional resident is the difference between the cost component and the credit component. Table V-7 summarizes the calculation of the net law enforcement and correctional facilities impact cost per functional resident.

The first section of Table V-7 identifies the total impact cost as \$672 per functional resident. The second section of the table identifies the capital expansion expenditure credits for the law enforcement and correctional facilities impact fee. Due to the uncertainty of future sales tax revenues, two scenarios have been developed: one that accounts for potential sales tax expenditures and one that excludes any future sales tax contributions.

The net impact cost per functional resident (third section of the table) is the difference between the total impact cost per functional resident of \$672 and the total revenue credit of \$338 per functional resident for Scenario 1 and \$232 per functional resident for Scenario 2. The result is a net impact cost of approximately \$335 per functional resident for Scenario 1 and \$440 per functional resident for Scenario 2.

Table V-7
Net Impact Cost per Functional Resident

| Impact Cost / Credit Element | With Sales Tax | | Without Sales Tax | |
|--|----------------|-----------------|-------------------|-----------------|
| | Impact Cost | Revenue Credits | Impact Cost | Revenue Credits |
| Impact Cost | | | | |
| Total Impact Cost per Functional Resident ⁽¹⁾ | \$672.44 | - | \$672.44 | - |
| Revenue Credit | | | | |
| Avg Annual Capital Improvement Credit per Functional Resident ⁽²⁾ | | \$21.63 | - | \$14.88 |
| Capitalization Rate | | 4.0% | - | 4.0% |
| Capitalization Period (in years) | | 25 | - | 25 |
| Capital Improvement Credit per Resident ⁽³⁾ | | \$337.91 | - | \$232.46 |
| Net Impact Cost | | | | |
| Net Impact Cost per Functional Resident ⁽⁴⁾ | \$334.53 | - | \$439.98 | - |

(1) Source: Table V-5

(2) Source: Table V-6

(3) Average annual capital improvement credit per functional resident (Item 2) with a capitalization rate of 4 percent for 25 years

(4) Total impact cost per functional resident (Item 1) less total revenue credit per functional resident (Item 3)

Calculated Law Enforcement and Correctional Facilities Impact Fee Schedule

Based on the analysis conducted in this section, two law enforcement/correctional facilities impact fee schedules were developed for residential and non-residential land uses in Charlotte County.

Scenario 1:

Table V-8 presents the calculated impact fee schedule utilizing future sales tax credits. This scenario estimates a higher credit and therefore a lower calculated impact fee.

Scenario 2:

Table V-9 presented the calculated impact fee schedule excluding future sales tax credit. This scenario estimates a lower credit and therefore a higher calculated impact fee.

Law Enforcement and Correctional Facilities Impact Fee Schedule Comparison

As part of the work effort in updating Charlotte County's law enforcement impact fee schedule, the County's calculated impact fee schedule was compared to the adopted fee schedule and those in similar or nearby jurisdictions. Table V-10 presents this comparison. Because Charlotte County's impact fee program is combined for law enforcement and correctional facilities, the comparison includes jurisdictions that have both of these fees for a more "apples-to-apples" comparison. In addition, because the County's current adopted fee includes only vehicles and equipment in this program area while including related buildings and land in the public buildings impact fee, the calculated fee for law enforcement/correctional facilities is higher than the adopted fee.

**Table V-8
Calculated Law Enforcement and Correctional Facilities Impact Fee Schedule (Scenario 1 – With Sales Tax)**

| ITE LUC | Land Use | Impact Unit | Functional Resident Coefficient ⁽¹⁾ | Calculated Impact Fee ⁽²⁾ | Administrative Fee @2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ | Current Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
|----------------------|--|--------------|--|--------------------------------------|--|---------------------------------|-----------------------------------|-------------------------------|
| RESIDENTIAL: | | | | | | | | |
| 210 | Single Family (Detached) | du | 1.42 | \$475.03 | \$11.69 | \$487 | \$78 | 524.4% |
| 220/230 | Multi-Family/Single Family Attached | du | 0.75 | \$250.90 | \$6.17 | \$257 | \$51 | 403.9% |
| 240 | Mobile Home | du | 0.77 | \$257.59 | \$6.34 | \$264 | \$55 | 380.0% |
| 253 | Congregate Care Facility | du | 0.83 | \$277.66 | \$6.83 | \$284 | n/a | n/a |
| LODGING: | | | | | | | | |
| 310 | Hotel | room | 0.55 | \$183.99 | \$4.53 | \$189 | \$59 | 220.3% |
| 320 | Motel | room | 0.51 | \$170.61 | \$4.20 | \$175 | \$59 | 196.6% |
| RECREATION: | | | | | | | | |
| 416 | RV Park | site | 0.50 | \$167.27 | \$4.11 | \$171 | n/a | n/a |
| 420 | Marina | boat berth | 0.19 | \$63.56 | \$1.56 | \$65 | n/a | n/a |
| 430 | Golf Course | hole | 1.08 | \$361.29 | \$8.89 | \$370 | n/a | n/a |
| 444 | Movie Theater w/Matinee | 1,000 sf | 5.98 | \$2,000.49 | \$49.21 | \$2,050 | \$459 | 346.6% |
| 492 | Health/Fitness Club | 1,000 sf | 3.09 | \$1,033.70 | \$25.43 | \$1,059 | n/a | n/a |
| INSTITUTIONS: | | | | | | | | |
| 520 | Elementary School (Private) | student | 0.06 | \$20.07 | \$0.49 | \$21 | n/a | n/a |
| 522 | Middle School (Private) | student | 0.07 | \$23.42 | \$0.58 | \$24 | n/a | n/a |
| 530 | High School (Private) | student | 0.08 | \$26.76 | \$0.66 | \$27 | n/a | n/a |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | 0.10 | \$33.45 | \$0.82 | \$34 | n/a | n/a |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | 0.07 | \$23.42 | \$0.58 | \$24 | n/a | n/a |
| 560 | Church | 1,000 sf | 0.51 | \$170.61 | \$4.20 | \$175 | \$29 | 503.4% |
| 565 | Day Care | 1,000 sf | 0.89 | \$297.73 | \$7.32 | \$305 | \$63 | 384.1% |
| 610 | Hospital | 1,000 sf | 1.37 | \$458.31 | \$11.27 | \$470 | \$73 | 543.8% |
| 620 | Nursing Home | 1,000 sf | 1.72 | \$575.39 | \$14.15 | \$590 | \$32 | 1743.8% |
| OFFICE: | | | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | 1.19 | \$398.09 | \$9.79 | \$408 | \$49 | 732.7% |
| | General Office 100,001-200,000 sf | 1,000 sf | 1.01 | \$337.88 | \$8.31 | \$346 | \$43 | 704.7% |
| | General Office 200,001-400,000 sf | 1,000 sf | 0.85 | \$284.35 | \$7.00 | \$291 | \$42 | 592.9% |
| | General Office greater than 400,000 sf | 1,000 sf | 0.77 | \$257.59 | \$6.34 | \$264 | \$39 | 576.9% |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | 1.14 | \$381.36 | \$9.38 | \$391 | \$66 | 492.4% |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 1.74 | \$582.08 | \$14.32 | \$596 | \$66 | 803.0% |
| RETAIL: | | | | | | | | |
| 820 | Retail 100,000 sf gla or less | 1,000 sf gla | 2.11 | \$705.86 | \$17.36 | \$723 | \$54 | 1238.9% |
| | Retail 100,001-200,000 sf gla | 1,000 sf gla | 2.12 | \$709.20 | \$17.45 | \$727 | \$76 | 856.6% |
| | Retail 200,001-400,000 sf gla | 1,000 sf gla | 2.34 | \$782.80 | \$19.26 | \$802 | \$102 | 686.3% |
| | Retail greater than 400,000 sf gla | 1,000 sf gla | 2.44 | \$816.25 | \$20.08 | \$836 | \$94 | 789.4% |
| 841 | New/Used Auto Sales | 1,000 sf | 1.47 | \$491.76 | \$12.10 | \$504 | \$128 | 293.8% |
| 849 | Tire Superstore | service bay | 1.34 | \$448.27 | \$11.03 | \$459 | n/a | n/a |
| 850 | Supermarket | 1,000 sf | 2.05 | \$685.79 | \$16.87 | \$703 | n/a | n/a |
| 851 | Convenience Market (24 hour) | 1,000 sf | 5.47 | \$1,829.88 | \$45.02 | \$1,875 | \$244 | 668.4% |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | 5.83 | \$1,950.31 | \$47.98 | \$1,998 | \$244 | 718.9% |
| 862 | Home Improvement Superstore | 1,000 sf | 1.81 | \$605.50 | \$14.90 | \$620 | n/a | n/a |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | 1.96 | \$655.68 | \$16.13 | \$672 | \$49 | 1271.4% |
| 890 | Furniture Store | 1,000 sf | 0.23 | \$76.94 | \$1.89 | \$79 | n/a | n/a |
| 911 | Bank/Savings Walk-In | 1,000 sf | 2.23 | \$746.00 | \$18.35 | \$764 | \$97 | 687.6% |
| 912 | Bank/Savings Drive-In ⁽⁷⁾ | 1,000 sf | 2.28 | \$762.73 | \$18.76 | \$781 | \$106 | 636.8% |
| 931 | Quality Restaurant | 1,000 sf | 6.82 | \$2,281.49 | \$56.12 | \$2,338 | \$244 | 858.2% |
| 932 | High-Turnover Restaurant | 1,000 sf | 6.78 | \$2,268.11 | \$55.80 | \$2,324 | \$303 | 667.0% |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | 8.90 | \$2,977.32 | \$73.24 | \$3,051 | \$303 | 906.9% |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 5.80 | \$1,940.27 | \$47.73 | \$1,988 | \$111 | 1691.0% |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | 1.91 | \$638.95 | \$15.72 | \$655 | \$19 | 3347.4% |
| 947 | Self-Service Car Wash | service bay | 0.87 | \$291.04 | \$7.16 | \$298 | n/a | n/a |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | 7.15 | \$2,391.89 | \$58.84 | \$2,451 | \$244 | 904.5% |
| INDUSTRIAL: | | | | | | | | |
| 110 | General Light Industrial | 1,000 sf | 0.69 | \$230.83 | \$5.68 | \$237 | \$27 | 777.8% |
| 120 | General Heavy Industrial | 1,000 sf | 0.49 | \$163.92 | \$4.03 | \$168 | \$27 | 522.2% |
| 140 | Manufacturing | 1,000 sf | 0.50 | \$167.27 | \$4.11 | \$171 | \$27 | 533.3% |
| 150 | Warehousing | 1,000 sf | 0.28 | \$93.67 | \$2.30 | \$96 | \$13 | 638.5% |
| 151 | Mini-Warehouse | 1,000 sf | 0.06 | \$20.07 | \$0.49 | \$21 | \$6 | 250.0% |

Note: GSF = gross square feet

- (1) Functional resident coefficients from Appendix A, Table A-11 for residential and transient, assisted/group land uses and Table A-13 for non-residential land uses
- (2) Calculated impact fee determined by multiplying the net impact cost per functional resident (Table V-7) by the functional resident coefficient (Item 1) for each land use
- (3) Calculated fee per unit (Item 2) multiplied by 2.46 percent to determine the administrative fee
- (4) Sum of the calculated fee per unit (Item 2) and the administrative fee (Item 3)
- (5) Source: Charlotte County Community Development Department; Includes a 2.46 percent administrative charge
- (6) Percent change from the current adopted fee rate (Item 5) to the total impact fee (Item 4)
- (7) The current adopted fee rate (Item 5) is charged "per lane"

**Table V-9
Calculated Law Enforcement and Correctional Facilities Impact Fee Schedule (Scenario 2 – Without Sales Tax)**

| ITE LUC | Land Use | Impact Unit | Functional Resident Coefficient ⁽¹⁾ | Calculated Impact Fee ⁽²⁾ | Administrative Fee @2.46% ⁽³⁾ | Total Impact Fee ⁽⁴⁾ | Current Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
|----------------------|--|--------------|--|--------------------------------------|--|---------------------------------|-----------------------------------|-------------------------------|
| RESIDENTIAL: | | | | | | | | |
| 210 | Single Family (Detached) | du | 1.42 | \$624.77 | \$15.37 | \$640 | \$78 | 720.5% |
| 220/230 | Multi-Family/Single Family Attached | du | 0.75 | \$329.99 | \$8.12 | \$338 | \$51 | 562.7% |
| 240 | Mobile Home | du | 0.77 | \$338.78 | \$8.33 | \$347 | \$55 | 530.9% |
| 253 | Congregate Care Facility | du | 0.83 | \$365.18 | \$8.98 | \$374 | n/a | n/a |
| LODGING: | | | | | | | | |
| 310 | Hotel | room | 0.55 | \$241.99 | \$5.95 | \$248 | \$59 | 320.3% |
| 320 | Motel | room | 0.51 | \$224.39 | \$5.52 | \$230 | \$59 | 289.8% |
| RECREATION: | | | | | | | | |
| 416 | RV Park | site | 0.50 | \$219.99 | \$5.41 | \$225 | n/a | n/a |
| 420 | Marina | boat berth | 0.19 | \$83.60 | \$2.06 | \$86 | n/a | n/a |
| 430 | Golf Course | hole | 1.08 | \$475.18 | \$11.69 | \$487 | n/a | n/a |
| 444 | Movie Theater w/Matinee | 1,000 sf | 5.98 | \$2,631.08 | \$64.72 | \$2,696 | \$459 | 487.4% |
| 492 | Health/Fitness Club | 1,000 sf | 3.09 | \$1,359.54 | \$33.44 | \$1,393 | n/a | n/a |
| INSTITUTIONS: | | | | | | | | |
| 520 | Elementary School (Private) | student | 0.06 | \$26.40 | \$0.65 | \$27 | n/a | n/a |
| 522 | Middle School (Private) | student | 0.07 | \$30.80 | \$0.76 | \$32 | n/a | n/a |
| 530 | High School (Private) | student | 0.08 | \$35.20 | \$0.87 | \$36 | n/a | n/a |
| 540 | Univ./Jr. College (7,500 or fewer students) (Private) | student | 0.10 | \$44.00 | \$1.08 | \$45 | n/a | n/a |
| 550 | Univ./Jr. College (more than 7,500 students) (Private) | student | 0.07 | \$30.80 | \$0.76 | \$32 | n/a | n/a |
| 560 | Church | 1,000 sf | 0.51 | \$224.39 | \$5.52 | \$230 | \$29 | 693.1% |
| 565 | Day Care | 1,000 sf | 0.89 | \$391.58 | \$9.63 | \$401 | \$63 | 536.5% |
| 610 | Hospital | 1,000 sf | 1.37 | \$602.77 | \$14.83 | \$618 | \$73 | 746.6% |
| 620 | Nursing Home | 1,000 sf | 1.72 | \$756.77 | \$18.62 | \$775 | \$32 | 2321.9% |
| OFFICE: | | | | | | | | |
| 710 | General Office 100,000 sf or less | 1,000 sf | 1.19 | \$523.58 | \$12.88 | \$536 | \$49 | 993.9% |
| | General Office 100,001-200,000 sf | 1,000 sf | 1.01 | \$444.38 | \$10.93 | \$455 | \$43 | 958.1% |
| | General Office 200,001-400,000 sf | 1,000 sf | 0.85 | \$373.98 | \$9.20 | \$383 | \$42 | 811.9% |
| | General Office greater than 400,000 sf | 1,000 sf | 0.77 | \$338.78 | \$8.33 | \$347 | \$39 | 789.7% |
| 720 | Medical Office/Clinic 10,000 sf or less | 1,000 sf | 1.14 | \$501.58 | \$12.34 | \$514 | \$66 | 678.8% |
| | Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 1.74 | \$765.57 | \$18.83 | \$784 | \$66 | 1087.9% |
| RETAIL: | | | | | | | | |
| 820 | Retail 100,000 sf gla or less | 1,000 sf gla | 2.11 | \$928.36 | \$22.84 | \$951 | \$54 | 1661.1% |
| | Retail 100,001-200,000 sf gla | 1,000 sf gla | 2.12 | \$932.76 | \$22.95 | \$956 | \$76 | 1157.9% |
| | Retail 200,001-400,000 sf gla | 1,000 sf gla | 2.34 | \$1,029.55 | \$25.33 | \$1,055 | \$102 | 934.3% |
| | Retail greater than 400,000 sf gla | 1,000 sf gla | 2.44 | \$1,073.55 | \$26.41 | \$1,100 | \$94 | 1070.2% |
| 841 | New/Used Auto Sales | 1,000 sf | 1.47 | \$646.77 | \$15.91 | \$663 | \$128 | 418.0% |
| 849 | Tire Superstore | service bay | 1.34 | \$589.57 | \$14.50 | \$604 | n/a | n/a |
| 850 | Supermarket | 1,000 sf | 2.05 | \$901.96 | \$22.19 | \$924 | n/a | n/a |
| 851 | Convenience Market (24 hour) | 1,000 sf | 5.47 | \$2,406.69 | \$59.20 | \$2,466 | \$244 | 910.7% |
| 853 | Convenience Market w/Gas Pumps | 1,000 sf | 5.83 | \$2,565.08 | \$63.10 | \$2,628 | \$244 | 977.0% |
| 862 | Home Improvement Superstore | 1,000 sf | 1.81 | \$796.36 | \$19.59 | \$816 | n/a | n/a |
| 880/881 | Pharmacy/Drug Store with or w/o Drive-Thru | 1,000 sf | 1.96 | \$862.36 | \$21.21 | \$884 | \$49 | 1704.1% |
| 890 | Furniture Store | 1,000 sf | 0.23 | \$101.20 | \$2.49 | \$104 | n/a | n/a |
| 911 | Bank/Savings Walk-In | 1,000 sf | 2.23 | \$981.16 | \$24.14 | \$1,005 | \$97 | 936.1% |
| 912 | Bank/Savings Drive-In ⁽⁷⁾ | 1,000 sf | 2.28 | \$1,003.15 | \$24.68 | \$1,028 | \$106 | 869.8% |
| 931 | Quality Restaurant | 1,000 sf | 6.82 | \$3,000.66 | \$73.82 | \$3,074 | \$244 | 1159.8% |
| 932 | High-Turnover Restaurant | 1,000 sf | 6.78 | \$2,983.06 | \$73.38 | \$3,056 | \$303 | 908.6% |
| 934 | Fast Food Rest. w/Drive-Thru | 1,000 sf | 8.90 | \$3,915.82 | \$96.33 | \$4,012 | \$303 | 1224.1% |
| 940 | Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 5.80 | \$2,551.88 | \$62.78 | \$2,615 | \$111 | 2255.9% |
| 944/946 | Gasoline/Service Station with or w/o Car Wash | fuel pos. | 1.91 | \$840.36 | \$20.67 | \$861 | \$19 | 4431.6% |
| 947 | Self-Service Car Wash | service bay | 0.87 | \$382.78 | \$9.42 | \$392 | n/a | n/a |
| n/a | Convenience/Gasoline/Fast Food | 1,000 sf | 7.15 | \$3,145.86 | \$77.39 | \$3,223 | \$244 | 1220.9% |
| INDUSTRIAL: | | | | | | | | |
| 110 | General Light Industrial | 1,000 sf | 0.69 | \$303.59 | \$7.47 | \$311 | \$27 | 1051.9% |
| 120 | General Heavy Industrial | 1,000 sf | 0.49 | \$215.59 | \$5.30 | \$221 | \$27 | 718.5% |
| 140 | Manufacturing | 1,000 sf | 0.50 | \$219.99 | \$5.41 | \$225 | \$27 | 733.3% |
| 150 | Warehousing | 1,000 sf | 0.28 | \$123.19 | \$3.03 | \$126 | \$13 | 869.2% |
| 151 | Mini-Warehouse | 1,000 sf | 0.06 | \$26.40 | \$0.65 | \$27 | \$6 | 350.0% |

Note: GSF = gross square feet

- (1) Functional resident coefficients from Appendix A, Table A-11 for residential and transient, assisted/group land uses and Table A-13 for non-residential land uses
- (2) Calculated impact fee determined by multiplying the net impact cost per functional resident (Table V-7) by the functional resident coefficient (Item 1) for each land use
- (3) Calculated fee per unit (Item 2) multiplied by 2.46 percent to determine the administrative fee
- (4) Sum of the calculated fee per unit (Item 2) and the administrative fee (Item 3)
- (5) Source: Charlotte County Community Development Department; Includes a 2.46 percent administrative charge
- (6) Percent change from the current adopted fee rate (Item 5) to the total impact fee (Item 4)
- (7) The current adopted fee rate (Item 5) is charged "per lane"

**Table V-10
Law Enforcement and Correctional Facilities Impact Fee Schedule Comparison**

| Land Use | Unit ⁽²⁾ | Charlotte County | | | Polk County ⁽⁶⁾ | Collier County ⁽⁷⁾ | Indian River County ⁽⁸⁾ | Sarasota County ⁽⁹⁾ |
|-----------------------------|---------------------|--|--|-------------------------|----------------------------|-------------------------------|------------------------------------|--------------------------------|
| | | Calculated (Scenario 1) ⁽³⁾ | Calculated (Scenario 2) ⁽⁴⁾ | Existing ⁽⁵⁾ | | | | |
| Date of Last Update | - | 2014 | 2014 | 2009 | 2009 | 2010 | 2005/14 | 2007 |
| Adoption % ⁽¹⁾ | - | 100% | 100% | 100% | 50% | 100% | 100%/0% | 100% |
| Residential: | | | | | | | | |
| Single Family (2,000 sq ft) | du | \$487 | \$640 | \$78 | \$245 | \$937 | \$425 | \$1,013 |
| Non-Residential: | | | | | | | | |
| Light Industrial | 1,000 sf | \$237 | \$311 | \$27 | \$60 | \$325 | \$194 | \$318 |
| Office (50,000 sq ft) | 1,000 sf | \$408 | \$536 | \$49 | \$552 | \$669 | \$281 | \$530 |
| Retail (125,000 sq ft) | 1,000 sf | \$727 | \$956 | \$76 | \$508 | \$1,082 | \$666 | \$1,320 |
| Bank w/Drive-In | 1,000 sf | \$781 | \$1,028 | \$106 | \$508 | \$1,097 | \$641 | \$1,320 |
| Fast Food w/Drive-Thru | 1,000 sf | \$3,051 | \$4,012 | \$303 | \$508 | \$4,242 | \$2,500 | \$1,320 |

(1) Represents the portion of the maximum calculated fee that was originally adopted

(2) Du = dwelling unit

(3) Source: Table V-8; Includes 2.46% administrative charge

(4) Source: Table V-9; Includes 2.46% administrative charge

(5) Source: Charlotte County Community Development Department; Includes 2.46% administrative charge; Bank w/Drive-In is measured per "lane"; Fee is currently suspended

(6) Source: Polk County Building & Construction Department; Fee is currently suspended through July 2015

(7) Source: Collier County Impact Fee Administration Department

(8) Source: Indian River County Planning Division; Includes 2.5% administration fee. IRC is in the process of updating its impact fee program. The County adopted the calculated non-residential impact fees in April of 2014 and is finalizing the calculations for residential land uses. Non-residential fees were adopted at approximately 60% combined for law enforcement (100% adoption) and correctional facilities (0% adoption).

(9) Source: Sarasota County Planning & Development Services; Includes 2.25% administration fee

VI. Parks & Recreation Facilities

This section discusses the analysis used in the update of the parks and recreation impact fee. To update the parks and recreation impact fee schedule, there are several major elements that need to be addressed, including:

- Inventory of Land and Recreation Facilities
- Service Area and Population
- Level-of-Service
- Cost Component
- Credit Component
- Net Parks & Recreation Facilities Impact Cost
- Calculated Parks & Recreation Facilities Impact Fee Schedule
- Parks & Recreation Facilities Impact Fee Schedule Comparison

These elements are summarized throughout this section, with the result being the proposed parks and recreation impact fee schedule.

Inventory of Land and Recreation Facilities

Charlotte County parks inventory used to calculate the impact fee includes community, regional and specialty parks. Of these, community parks impact fee is only collected in the unincorporated county since the City of Punta Gorda provides its own community parks. Regional and specialty parks impact fee is collected countywide due to the larger service area of these types of parks. Smaller parks such as neighborhood and mini parks, are not included in the inventory because of their limited service areas. The Recreation and Open Space Data and Analysis section of the Smart Charlotte 2050 includes definitions of each park type.

As shown in Table VI-1, the County owns 8 community parks and 25 regional and specialty parks. Of these, land for Anger Fishing Pier is not owned by the County, but the facilities are. As such, only the facilities in this park are included in the inventory. In addition, recreation facilities that generate capital revenue (such as the stadium at the Charlotte Sports Park) are also excluded from the inventory.

**Table VI-1
Parks & Recreation Facilities Inventory⁽¹⁾**

| Parcel ID | Name of the Facility | Total Acreage | Type/Class | Basketball Court | Baseball Fields | Boat Ramp | Community Center (sf) | Fishing Pier (sf) | Football Field | Picnic Pavilion | Play-ground | Restrooms | Soccer Field | Softball Field | Swimming Pool | Tennis Courts | Trails | Volleyball Court |
|--------------|--|--------------------|------------|------------------|-----------------|-----------|-----------------------|-------------------|----------------|-----------------|-------------|-----------|--------------|----------------|---------------|---------------|--------------|------------------|
| 412008104001 | Ainger Creek Park | 1.93 | Specialty | - | - | 1 | - | - | 3 | - | - | - | - | - | - | - | - | - |
| 412006302003 | Anger Fishing Pier | n/a ⁽²⁾ | Specialty | - | - | - | - | 340 | - | - | - | - | - | - | - | - | - | - |
| 412009376001 | Ann Dever Memorial Regional Park | 50.00 | Regional | 2 | - | - | - | 150 | - | 2 | 2 | 1 | - | - | 1 | 2 | 3.75 | - |
| 412006101003 | Bay Heights Park | 2.57 | Specialty | - | - | - | - | - | - | - | - | 1 | - | - | - | - | - | - |
| 402236106001 | Bayshore Live Oak Park | 10.32 | Specialty | - | - | - | - | 621 | - | 2 | 1 | 2 | - | - | - | - | 1.00 | - |
| 422035102001 | Boca Grande Fishing Pier (north and south) | 4.50 | Specialty | - | - | - | - | 1,075 | - | - | - | - | - | - | - | - | - | - |
| 412105481003 | Cape Haze Pioneer Trail | 67.60 | Specialty | - | - | - | - | - | - | 1 | - | 1 | - | - | - | - | 8.40 | - |
| 412309100001 | Carmalita Park | 55.42 | Community | - | - | - | - | - | 2 | - | 2 | 3 | - | 5 | - | - | - | - |
| 411912403003 | Chadwick Park/Englewood Beach | 12.16 | Specialty | 1 | - | - | - | 265 | - | 5 | 1 | 1 | - | - | - | - | - | 2 |
| 412306301003 | Charlotte Harbor Event and Conference Center | 7.95 | Specialty | - | - | - | 47,443 | - | - | - | - | - | - | - | - | - | - | - |
| 402114100007 | Charlotte Sports Park | 82.00 | Specialty | - | - | - | - | - | - | - | 1 | - | - | - | - | - | - | - |
| 402236229003 | Chester Roberts Park | 0.32 | Specialty | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 422012328001 | Coral Creek Fishing Pier | 1.15 | Specialty | - | - | - | - | 251 | - | - | - | - | - | - | - | - | - | - |
| 402333427001 | Darst Boat Ramp | 0.53 | Specialty | - | - | 1 | - | - | - | - | - | - | - | - | - | - | - | - |
| 402128276001 | El Jobean Boat Ramp | 1.33 | Specialty | - | - | 1 | - | - | - | - | - | - | - | - | - | - | - | - |
| 402128451001 | El Jobean Fishing Pier | 4.69 | Specialty | - | - | - | - | 945 | - | - | - | - | - | - | - | - | - | - |
| 402208401003 | Franz Ross Park | 33.00 | Community | - | - | - | - | - | 3 | - | 1 | 1 | - | - | - | 4 | 0.09 | - |
| 402212229001 | Harold Avenue Park | 41.30 | Community | 2 | 4 | - | 15,915 | - | - | - | 1 | - | - | 3 | - | 4 | - | - |
| 402426102001 | Hathaway Park | 29.00 | Community | - | - | 1 | - | - | - | - | - | - | - | - | - | - | 1.00 | - |
| 402226401005 | Hickory Bluff Park | 32.82 | Specialty | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 412108479001 | Holiday Lakes Boat Ramp | 6.20 | Specialty | - | - | 1 | - | - | - | - | - | - | - | - | - | - | - | - |
| 402111251001 | North Charlotte Regional Park | 103.30 | Regional | - | 4 | - | - | - | - | - | - | - | 4 | 1 | - | - | - | - |
| 402232126011 | O'Hare Canoe/Kayak Launch | 11.58 | Specialty | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 422012301003 | Placida Boat Ramp | 5.62 | Specialty | - | - | 2 | - | - | - | - | - | - | - | - | - | - | - | - |
| 422012328001 | Placida Fishing Pier | 2.54 | Specialty | - | - | - | - | 75 | - | - | - | - | - | - | - | - | - | - |
| 402228451001 | Port Charlotte Beach Park | 16.08 | Community | 1 | - | 2 | 8,000 | 1,112 | - | - | 1 | 1 | - | - | 1 | 1 | - | 1 |
| 402325237009 | Riverside Park | 0.56 | Specialty | - | - | 1 | - | - | - | - | - | - | - | - | - | - | - | - |
| 412024301001 | Rotonda Park | 32.13 | Community | - | - | - | - | - | - | - | 1 | 1 | - | - | - | 2 | 0.75 | - |
| 412305376001 | South County Regional Park | 90.31 | Regional | 3 | 4 | - | 16,325 | 3,500 | - | 1 | 1 | - | 4 | 1 | 1 | 2 | - | 2 |
| 402221351001 | Spring Lake Park | 8.11 | Specialty | - | - | 1 | - | 150 | - | 1 | - | 1 | - | - | - | - | 0.50 | - |
| 412110300002 | St. Paul Linear Park | 8.33 | Specialty | - | - | - | - | 684 | - | - | - | - | - | - | - | - | 1.00 | - |
| 402228226001 | Sunrise Park | 40.28 | Community | - | - | - | - | - | - | - | - | 1 | - | - | - | 2 | - | - |
| 412003433001 | Tringali Park | 8.02 | Community | 3 | - | - | 12,665 | - | - | - | 1 | - | - | - | - | 4 | - | 2 |
| | Total (County Owned) | 771.65 | | 12 | 12 | 11 | 100,348 | 9,168 | 8 | 12 | 13 | 14 | 8 | 10 | 3 | 21.0 | 16.49 | 7 |
| Count | Summary of Parks & Recreation Facilities | Total Acreage | | Basketball Court | Baseball Fields | Boat Ramp | Community Center (sf) | Fishing Pier (sf) | Football Field | Picnic Pavilion | Play-ground | Restrooms | Soccer Field | Softball Field | Swimming Pool | Tennis Courts | Trails | Volleyball Court |
| 8 | Community Parks | 255.23 | | 6 | 4 | 3 | 36,580 | 1,112 | 5 | 0 | 7 | 7 | 0 | 8 | 1 | 17 | 1.84 | 3 |
| 22 | Specialty Parks | 272.81 | | 1 | 0 | 8 | 47,443 | 4,406 | 3 | 9 | 3 | 6 | 0 | 0 | 0 | 0 | 10.90 | 2 |
| 3 | Regional Parks | 243.61 | | 5 | 8 | 0 | 16,325 | 3,650 | 0 | 3 | 3 | 1 | 8 | 2 | 2 | 4 | 3.75 | 2 |
| 33 | Total | 771.65 | | 12 | 12 | 11 | 100,348 | 9,168 | 8 | 12 | 13 | 14 | 8 | 10 | 3 | 21 | 16.49 | 7 |

(1) Source: Charlotte County

(2) Land is leased

Service Area and Population

As mentioned previously, Charlotte County provides community parks and recreation facilities and services in the unincorporated areas of the county. The City of Punta Gorda provides these facilities and services within its jurisdiction. As a result, the community parks and recreation impact fee analysis will consider only unincorporated county area population. In the case of regional and specialty parks, the services are provided countywide. Appendix A, Table A-1, provides the estimated countywide and unincorporated area population for 2014 and the projected population through 2040. Parks impact fees are charged only to residential land uses. As such, the weighted seasonal population per housing unit is used to measure demand from each residential land use.

Level-of-Service

The current LOS for all county-owned and maintained community parks LOS is 1.57 acres per 1,000 residents and is calculated based on unincorporated county population. The regional/specialty parks LOS is 2.86 acres per 1,000 residents based on countywide population. Table VI-2 presents these calculations. The County’s LOS standard is calculated on a point-system, based on a combination of acreage and recreational facilities. As mentioned previously, for the purposes of impact fee calculations, LOS is measured in terms of the net capital asset value per resident. However, for planning and tracking purposes, it is typically attached to acreage in the case of parks impact fees.

**Table VI-2
Current Level-of-Service (2014)**

| Location | 2014 Population ⁽¹⁾ | Park Acreage ⁽²⁾ | Current Achieved LOS ⁽³⁾ |
|--|--------------------------------|-----------------------------|-------------------------------------|
| Unincorporated Charlotte County | 162,382 | | |
| Countywide | 180,425 | | |
| Parks & Recreation Level-of-Service (acres per 1,000 residents) | | | |
| Community Parks | | 255.23 | 1.57 |
| Regional/Specialty Parks | | 516.42 | 2.86 |
| Total (All Parks) | | 771.65 | 4.43 |

(1) Source: Appendix A, Table A-1; Unincorporated County

(2) Source: Table VI-1

(3) Park acreage (Item 2) divided by the population (Item 1) and multiplied by 1,000 residents

Table VI-3 presents a comparison of the parks and recreation adopted LOS standards of other Florida counties to Charlotte County’s achieved LOS. Based on this comparison, Charlotte County’s LOS is in the range of the required acreage per 1,000 residents in other communities.

**Table VI-3
Level-of-Service Comparison**

| Jurisdiction | LOS Standard (Acres per 1,000 Residents) ⁽¹⁾ |
|--|---|
| Marion County ⁽¹⁾ | 2.00 |
| Brevard County ⁽²⁾ | 3.00 |
| City of North Port ⁽³⁾ | 3.00 |
| Lake County ⁽⁴⁾ | 4.00 |
| Collier County ⁽⁵⁾ | 4.10 |
| Charlotte County (Achieved)⁽⁶⁾ | 4.43 |
| City of Punta Gorda ⁽⁷⁾ | 5.00 |
| Indian River County ⁽⁸⁾ | 6.61 |
| Polk County ⁽⁹⁾ | 6.95 |
| City of Venice ⁽¹⁰⁾ | 7.00 |
| Sarasota County ⁽¹¹⁾ | 7.00 |
| Lee County ⁽¹²⁾ | 8.00 |
| Pasco County ⁽¹³⁾ | 12.00 |

- (1) Source: Marion County 2035 Comprehensive Plan
- (2) Source: Brevard County Comprehensive Plan
- (3) Source: North Port Evaluation and Appraisal Report
- (4) Source: Lake County Comprehensive Plan
- (5) Source: Collier County Parks and Recreation Master Plan
- (6) Source: Table VI-2
- (7) Source: City of Punta Gorda Comprehensive Plan
- (8) Source: Indian River County 2030 Comprehensive Plan
- (9) Source: Polk County Comprehensive Plan
- (10) Source: City of Venice Comprehensive Plan
- (11) Source: Sarasota County Comprehensive Plan
- (12) Source: Lee County Concurrency Report
- (13) Source: Pasco County 2025 Comprehensive Plan

Cost Component

The total cost per resident for parks and recreation facilities consists of two components: the cost of purchasing and developing land for each park and the cost of facilities and equipment located at each park.

Land Cost

Because of recent fluctuations in land values statewide, a detailed analysis of land values for each type of park (and the geographic subareas within the county) was conducted. This analysis takes into consideration current land value of the existing parks as reported by the Charlotte County Property Appraiser as well as an analysis of recent sales of vacant land similar in size and location to Charlotte County's parks. Based on this analysis, an average land value of \$15,000 per acre is used in the case of community parks and \$50,000 per acre is used for regional/specialty parks in the impact fee calculations. Appendix B provides the data used for this analysis.

The cost of land for parks and recreation facilities includes more than just the purchase cost of the land. Landscaping/site improvement and utilities/paving costs are also considered. These costs can vary greatly, depending on the type of services offered at each park. Based on information provided by the County, as well as information from similarly sized jurisdictions and park types, basic landscaping, site preparation, and irrigation costs were estimated and are presented in Table VI-5.

Facility and Equipment Cost

The second step in calculating the total cost for parks and recreation services in Charlotte County involves estimating the current value of recreational facilities. When available, the value for the parks facilities and equipment is estimated based on recent bids or purchases made by the County for its park facilities. When recent bid/purchase information was not available, unit costs from the County's insurance reports and recent costs for similar facilities from other jurisdictions were used. These figures were refined based on discussions with and information provided by the County's Facilities Construction and Maintenance Department.

As presented in Table VI-4, the total park facility value is \$27.8 million for community parks and \$43.1 million for regional parks, for a combined total of \$70.9 million, including facilities, equipment, and architecture and engineering (A&E) costs.

**Table VI-4
Recreational Facility Value**

| Facility ⁽¹⁾ | | Unit Value ⁽²⁾ | Community Parks | | Regional/Specialty Parks | | Total Value ⁽⁷⁾ | |
|--|------------|---------------------------|----------------------|----------------------------|--------------------------|----------------------------|----------------------------|---------------------|
| Description | Unit | | Count ⁽³⁾ | Total Value ⁽⁴⁾ | Count ⁽⁵⁾ | Total Value ⁽⁶⁾ | | |
| Baseball Field (lighted) | field | \$850,000 | 4 | \$3,400,000 | 8 | \$6,800,000 | \$10,200,000 | |
| Basketball Court | court | \$55,000 | 4 | \$220,000 | 1 | \$55,000 | \$275,000 | |
| Basketball Court (lighted) | court | \$90,000 | 2 | \$180,000 | 5 | \$450,000 | \$630,000 | |
| Boat Ramp Lane | ramp lane | \$240,000 | 3 | \$720,000 | 8 | \$1,920,000 | \$2,640,000 | |
| Community Center | sq ft | \$235 | 36,580 | \$8,596,300 | 63,768 | \$14,985,480 | \$23,581,780 | |
| Fishing Pier | sq ft | \$65 | 1,112 | \$72,280 | 8,056 | \$523,640 | \$595,920 | |
| Football Field (lighted) | field | \$600,000 | 5 | \$3,000,000 | 3 | \$1,800,000 | \$4,800,000 | |
| Picnic Pavilion | pavilion | \$136,000 | 0 | \$0 | 12 | \$1,632,000 | \$1,632,000 | |
| Playground | playground | \$175,000 | 7 | \$1,225,000 | 6 | \$1,050,000 | \$2,275,000 | |
| Restroom | restrooms | \$200,000 | 7 | \$1,400,000 | 7 | \$1,400,000 | \$2,800,000 | |
| Soccer Field (lighted) | field | \$375,000 | 0 | \$0 | 8 | \$3,000,000 | \$3,000,000 | |
| Softball Field (lighted) | field | \$450,000 | 8 | \$3,600,000 | 2 | \$900,000 | \$4,500,000 | |
| Swimming Pool | pool | \$950,000 | 1 | \$950,000 | 2 | \$1,900,000 | \$2,850,000 | |
| Tennis Court (unlit) | court | \$70,000 | 17 | \$1,190,000 | 4 | \$280,000 | \$1,470,000 | |
| Trail (unpaved) | miles | \$120,000 | 1.84 | \$220,800 | 14.65 | \$1,758,000 | \$1,978,800 | |
| Volleyball Court | court | \$7,000 | 3 | \$21,000 | 4 | \$28,000 | \$49,000 | |
| Facilities Value | | | | | | \$24,795,380 | \$38,482,120 | \$63,277,500 |
| Architecture, Engineering, and Inspection @ 12%⁽⁸⁾ | | | | | | \$2,975,446 | \$4,617,854 | \$7,593,300 |
| Total Facilities Value⁽⁹⁾ | | | | | | \$27,770,826 | \$43,099,974 | \$70,870,800 |
| Total Number of Acres⁽¹⁰⁾ | | | | | | 255.23 | 516.42 | 771.65 |
| Total Facilities Value per Acre⁽¹¹⁾ | | | | | | \$108,807 | \$83,459 | \$91,843 |

(1) Source: Table VI-1

(2) Source: Recent bids and information provided by the Charlotte County Facilities Construction and Maintenance Department, Charlotte County insurance reports, and recent costs from other jurisdictions

(3) Source: Table VI-1; Distribution of lighted and un-lit units was provided by County Staff

(4) Unit value (Item 2) multiplied by the number of units (Item 3)

(5) Source: Table VI-1

(6) Unit value (Item 2) multiplied by the number of units (Item 5)

(7) Sum of the total value for community parks (Item 4) and the total value for regional/specialty parks (Item 6)

(8) Facility value multiplied by 12% based on discussions with the Charlotte County Facilities Construction and Maintenance Department for both park types

(9) Sum of the facilities value and the architecture, engineering, and inspection cost (Item 8) for each park type

(10) Source: Table VI-1

(11) Facilities value (Item 9) divided by the total number of acres (Item 10) for each park type

Total Impact Cost per Resident

Table VI-5 presents the total impact cost per resident for parks and recreation facilities in Charlotte County. Using the current achieved LOS, as previously presented in Table VI-2, the total cost for community parks in Charlotte County is \$226 per resident and the total cost for regional/specialty parks is \$439 per resident.

**Table VI-5
Total Parks and Recreation Impact Cost per Resident**

| Facility/Calculation Step | Park Type | |
|---|------------------|------------------------|
| | Community | Regional/ Specialty |
| Land Purchase Cost per Acre ⁽¹⁾ | \$15,000 | \$50,000 |
| Landscaping, Site Preparation, Irrigation & Parking Costs (per acre) ⁽²⁾ | \$20,000 | \$20,000 |
| Recreational Facility Cost ⁽³⁾ | \$108,807 | \$83,459 |
| Total Land & Facility Cost per Acre ⁽⁴⁾ | \$143,807 | \$153,459 |
| Parks LOS / LOS Standard (acres per 1,000 Residents) ⁽⁵⁾ | 1.57 | 2.86 |
| Parks & Recreation Total Impact Cost per Resident ⁽⁶⁾ | \$225.78 | \$438.89 |

(1) Source: Appendix B

(2) Source: Charlotte County

(3) Source: Table VI-4

(4) Sum of land purchase cost (Item 1), landscaping/site prep/irrigation cost (Item 2), and recreational facility cost (Item 3)

(5) Source: Table VI-2

(6) Total land and facility cost per acre (Item 4) multiplied by the LOS (Item 5) and divided by 1,000

Credit Component

To avoid overcharging new development for the capital cost of providing parks and recreation services, a review of the capital financing program for the parks and recreation program was completed. The purpose of this review was to estimate any future revenues generated by new development, other than impact fees, which will be used to fund the expansion of capital facilities and land related to Charlotte County's parks and recreation program.

Capital Expansion Expenditures Credit

Between 2009 and 2019, Charlotte County spent or is planning to spend a total of \$35.9 million for capital expansion of parks. These expenditures were, or will be, funded with sales tax revenue, grants/donations/parking fees, and ad valorem revenues. As shown in Table VI-6, approximately \$6.7 million is allocated to community parks, which includes a

portion of the countywide park improvements (50 percent). Similarly, the \$29.2 million for regional/specialty parks also includes portion of countywide improvements (50 percent). Since the review of these expenditures spanned 2009 through 2019, the average annual capital expansion cost is divided by the average population for this same period. As presented in Table VI-6, the average annual capital expansion expenditure is approximately \$4 per resident for community parks and \$15 per resident for regional/specialty parks.

Given that the local option sales tax in Charlotte County will expire at the end of 2014, which could potentially eliminate sales tax as a parks and recreation funding source, an additional credit scenario that excludes future sales tax funding was developed. As presented in Table VI-7, the average annual capital expansion expenditure is approximately \$2 per resident for community parks and \$3 per resident for regional/specialty parks under the assumption that sales tax revenues will no longer be available for parks and recreation capacity projects.

**Table VI-6
Parks and Recreation Capital Expansion Funding (with Sales Tax)⁽¹⁾**

| Project Description | Park Type ⁽²⁾ | FY 2009 to FY 2013 | FY 2014 | FY 2015 | FY 2016 | FY 2017 | FY 2018 | FY 2019 | Total |
|--|--------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| Sales Tax: | | | | | | | | | |
| Bayshore Live Oak Park | R/S | \$55,527 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$55,527 |
| North Charlotte Regional Park (Rec Center) | R/S | \$1,254,955 | | \$1,626,400 | \$1,626,400 | \$1,626,400 | \$1,626,400 | \$1,626,400 | \$9,386,955 |
| South County Regional Park (Rec Center) | R/S | \$750 | | \$99,400 | \$99,400 | \$99,400 | \$99,400 | \$99,400 | \$497,750 |
| Harold Ave Park (Rec Center) | C | \$0 | | \$488,000 | \$488,000 | \$488,000 | \$488,000 | \$488,000 | \$2,440,000 |
| Tringali Park (Rec Center) | C | \$0 | | \$121,400 | \$121,400 | \$121,400 | \$121,400 | \$121,400 | \$607,000 |
| Bay Heights Park (West County Boat Ramp) | R/S | \$2,686,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$2,686,000 |
| Ann Dever Regional Park (Rec Center) | R/S | \$0 | | \$1,807,200 | \$1,807,200 | \$1,807,200 | \$1,807,200 | \$1,807,200 | \$9,036,000 |
| Oyster Creek Pool (Ann Dever) | R/S | \$0 | | \$52,000 | \$52,000 | \$52,000 | \$52,000 | \$52,000 | \$260,000 |
| Veterans Memorial Park | R/S | \$0 | | \$138,538 | \$138,538 | \$138,538 | \$138,538 | \$138,540 | \$692,692 |
| Sales Tax Funding -- Subtotal | - | \$3,997,232 | \$0 | \$4,332,938 | \$4,332,938 | \$4,332,938 | \$4,332,938 | \$4,332,940 | \$25,661,924 |
| Grants/Donations/Parking Fees: | | | | | | | | | |
| Ainger Creek Boat Ramp | R/S | \$35,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$35,000 |
| Cattledock | R/S | \$179,021 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$179,021 |
| Bay Heights Park (West County Boat Ramp) | R/S | \$0 | \$629,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$629,000 |
| Grants/Donations/Parking Fees Funding -- Subtotal | - | \$214,021 | \$629,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$843,021 |
| Ad Valorem: | | | | | | | | | |
| Bayshore Live Oak Park | R/S | \$102,251 | \$975,000 | \$60,000 | \$0 | \$0 | \$0 | \$0 | \$1,137,251 |
| Port Charlotte Beach Park (Pool Deck/Floating Dock) | C | \$252,436 | \$165,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$417,436 |
| North Charlotte Regional Park | R/S | \$4,573 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$4,573 |
| Charlotte Sports Park | R/S | \$34,974 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$34,974 |
| South County Regional Park (Concession Stand) | R/S | \$13,963 | \$70,000 | \$325,000 | \$0 | \$0 | \$0 | \$0 | \$408,963 |
| Ainger Creek Boat Ramp | R/S | \$149,270 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$149,270 |
| Bay Heights Park (West County Boat Ramp) | R/S | \$1,166,003 | \$2,688,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$3,854,003 |
| Concession Stands | C | \$912,045 | \$885,000 | \$126,000 | \$600,000 | \$500,000 | \$0 | \$0 | \$3,023,045 |
| Parks Comprehensive Master Plan | CW | \$0 | \$200,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$200,000 |
| Portable Stage | CW | \$0 | \$0 | \$0 | \$0 | \$175,000 | \$0 | \$0 | \$175,000 |
| Ad Valorem Tax Funding -- Subtotal | - | \$2,635,515 | \$4,983,000 | \$511,000 | \$600,000 | \$675,000 | \$0 | \$0 | \$9,404,515 |
| Total (All Funding Sources) | | \$6,846,768 | \$5,612,000 | \$4,843,938 | \$4,932,938 | \$5,007,938 | \$4,332,938 | \$4,332,940 | \$35,909,460 |
| Total Expenditures (Community Parks) | | \$1,164,481 | \$1,150,000 | \$735,400 | \$1,209,400 | \$1,196,900 | \$609,400 | \$609,400 | \$6,674,981 |
| Average Annual Expenditures⁽³⁾ | | | | | | | | | \$606,816 |
| Average Annual Population⁽⁴⁾ | | | | | | | | | 162,579 |
| Average Annual Expenditures by Resident⁽⁵⁾ | | | | | | | | | \$3.73 |
| Total Expenditures (Regional/Specialty Parks) | | \$5,682,287 | \$4,462,000 | \$4,108,538 | \$3,723,538 | \$3,811,038 | \$3,723,538 | \$3,723,540 | \$29,234,479 |
| Average Annual Expenditures⁽³⁾ | | | | | | | | | \$2,657,680 |
| Average Annual Population⁽⁴⁾ | | | | | | | | | 180,941 |
| Average Annual Expenditures by Resident⁽⁵⁾ | | | | | | | | | \$14.69 |

(1) Source: Charlotte County Capital Improvement Program

(2) "C" = Community; "R/S" = Regional/Specialty; Countywide parks were equally distributed between the community and regional/specialty expenditures

(3) Source: Total expenditures for community of regional/specialty parks divided by 11 year

(4) Source: Appendix A, Table A-1. Average annual weighted seasonal population for 2009 to 2019; "unincorporated" for community parks and "countywide" for regional/specialty parks

(5) Average annual capacity expansion expenditures divided by the average annual population

**Table VI-7
Parks and Recreation Capital Expansion Funding (without Sales Tax)⁽¹⁾**

| Project Description | Park Type ⁽²⁾ | FY 2009 to FY 2013 | FY 2014 | FY 2015 | FY 2016 | FY 2017 | FY 2018 | FY 2019 | Total |
|--|--------------------------|--------------------|--------------------|------------------|------------------|------------------|------------|------------|---------------------|
| Grants/Donations/Parking Fees: | | | | | | | | | |
| Ainger Creek Boat Ramp | R/S | \$35,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$35,000 |
| Cattledock | R/S | \$179,021 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$179,021 |
| Bay Heights Park (West County Boat Ramp) | R/S | \$0 | \$629,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$629,000 |
| Grants/Donations/Parking Fees Funding -- Subtotal | - | \$214,021 | \$629,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$843,021 |
| Ad Valorem: | | | | | | | | | |
| Bayshore Live Oak Park | R/S | \$102,251 | \$975,000 | \$60,000 | \$0 | \$0 | \$0 | \$0 | \$1,137,251 |
| Port Charlotte Beach Park | C | \$252,436 | \$165,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$417,436 |
| North Charlotte Regional Park | R/S | \$4,573 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$4,573 |
| Charlotte Sports Park | R/S | \$34,974 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$34,974 |
| South County Regional Park | R/S | \$13,963 | \$70,000 | \$325,000 | \$0 | \$0 | \$0 | \$0 | \$408,963 |
| Ainger Creek Boat Ramp | R/S | \$149,270 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$149,270 |
| Bay Heights Park (West County Boat Ramp) | R/S | \$1,166,003 | \$2,688,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$3,854,003 |
| Concession Stands | C | \$912,045 | \$885,000 | \$126,000 | \$600,000 | \$500,000 | \$0 | \$0 | \$3,023,045 |
| Parks Comprehensive Master Plan | CW | \$0 | \$200,000 | \$0 | \$0 | \$0 | \$0 | \$0 | \$200,000 |
| Portable Stage | CW | \$0 | \$0 | \$0 | \$0 | \$175,000 | \$0 | \$0 | \$175,000 |
| Ad Valorem Tax Funding -- Subtotal | - | \$2,635,515 | \$4,983,000 | \$511,000 | \$600,000 | \$675,000 | \$0 | \$0 | \$9,404,515 |
| Total (All Funding Sources) | | \$2,849,536 | \$5,612,000 | \$511,000 | \$600,000 | \$675,000 | \$0 | \$0 | \$10,247,536 |
| Total Expenditures (Community Parks) | | \$1,164,481 | \$1,150,000 | \$126,000 | \$600,000 | \$587,500 | \$0 | \$0 | \$3,627,981 |
| Average Annual Expenditures⁽³⁾ | | | | | | | | | \$329,816 |
| Average Annual Population⁽⁴⁾ | | | | | | | | | 162,579 |
| Average Annual Expenditures by Resident⁽⁵⁾ | | | | | | | | | \$2.03 |
| Total Expenditures (Regional/Specialty Parks) | | \$1,685,055 | \$4,462,000 | \$385,000 | \$0 | \$87,500 | \$0 | \$0 | \$6,619,555 |
| Average Annual Expenditures⁽³⁾ | | | | | | | | | \$601,778 |
| Average Annual Population⁽⁴⁾ | | | | | | | | | 180,941 |
| Average Annual Expenditures by Resident⁽⁵⁾ | | | | | | | | | \$3.33 |

(1) Source: Source: Charlotte County Capital Improvement Program

(2) "C" = Community; "R/S" = Regional/Specialty; "CW" = Countywide. Countywide parks were equally distributed between the community and regional/specialty expenditures

(3) Source: Total expenditures for community of regional/specialty parks divided by 11 year

(4) Source: Appendix A, Table A-1. Average annual weighted seasonal population for 2009 to 2019; "unincorporated" for community parks and "countywide" for regional/specialty parks

(5) Average annual capacity expansion expenditures divided by the average annual population

Net Impact Cost per Resident

The net impact fee per functional resident is the difference between the Cost Component and the Credit Component. Table VI-8 summarizes the calculation of the net impact cost per resident for Community Parks for both credit scenarios.

**Table VI-8
Net Impact Cost per Resident (Community Parks)**

| Community Parks Impact Cost / Credit Element | W/Sales Tax | | W/O Sales Tax | |
|---|-----------------|-----------------|-----------------|-----------------|
| | Impact Cost | Revenue Credits | Impact Cost | Revenue Credits |
| Impact Cost | | | | |
| Total Impact Cost per Resident ⁽¹⁾ | \$225.78 | - | \$225.78 | - |
| Revenue Credit | | | | |
| Avg Annual Capital Expansion Credit per Resident ⁽²⁾ | | \$3.73 | | \$2.03 |
| Capitalization Rate | | 4.0% | | 4.0% |
| Capitalization Period (in years) | | 25 | | 25 |
| Capital Expansion Credit per Resident ⁽³⁾ | | \$58.27 | | \$31.71 |
| Net Impact Cost | | | | |
| Net Impact Cost per Resident ⁽⁴⁾ | \$167.51 | - | \$194.07 | - |

(1) Source: Table VI-5

(2) Source: Table VI-6 (w/Sales Tax) and Table VI-7 (w/o Sales Tax)

(3) Average annual capital expansion credit per resident (Item 2) with a capitalization rate of 4 percent for 25 years

(4) Total impact cost per resident (Item 1) less the total revenue credit per functional resident (Item 3)

Table VI-9 summarizes the net impact cost for Regional/Specialty Parks for both credit scenarios. As previously presented, Scenario 1 includes sales tax revenues in the credit and Scenario 2 excludes sales tax revenues from the credit component.

**Table VI-9
Net Impact Cost per Resident (Regional/Specialty Parks)**

| Regional/Specialty Parks Impact Cost / Credit Element | W/Sales Tax | | W/O Sales Tax | |
|---|-----------------|-----------------|-----------------|-----------------|
| | Impact Cost | Revenue Credits | Impact Cost | Revenue Credits |
| Impact Cost | | | | |
| Total Impact Cost per Resident ⁽¹⁾ | \$438.89 | - | \$438.89 | - |
| Revenue Credit | | | | |
| Avg Annual Capital Expansion Credit per Resident ⁽²⁾ | | \$14.69 | | \$3.33 |
| Capitalization Rate | | 4.0% | | 4.0% |
| Capitalization Period (in years) | | 25 | | 25 |
| Capital Expansion Credit per Resident ⁽³⁾ | | \$229.49 | | \$52.02 |
| Net Impact Cost | | | | |
| Net Impact Cost per Resident ⁽⁴⁾ | \$209.40 | - | \$386.87 | - |

(1) Source: Table VI-5

(2) Source: Table VI-6 (w/Sales Tax) and Table VI-7 (w/o Sales Tax)

(3) Average annual capital expansion credit per resident (Item 2) over a capitalization rate of 4 percent for 25 years

(4) Total impact cost per resident (Item 1) less the total revenue credit per functional resident (Item 3)

Calculated Parks & Recreation Impact Fee Schedule

Table VI-10 presents the updated Community parks and recreation impact fee schedule for residential land uses in Charlotte County. Table VI-10 also presents the fee rates for both credit scenarios as well as the difference between the current and calculated impact fee rates.

Table VI-11 presents the updated Regional/Specialty parks and recreation impact fee schedule for residential land uses in Charlotte County. Table VI-11 also presents the fee rates for both credit scenarios as well as the difference between the current and calculated impact fee rates.

Table VI-12 presents a comparison of the calculated fee rates to the current fee rates in Charlotte County. As shown, the Regional Parks fee rates that will be paid in the City of Punta Gorda and the total parks fee rate for the unincorporated county (combined Community and Regional/Specialty Parks) rate are compared to the current fee rates.

**Table VI-10
Calculated Parks & Recreation Impact Fee Schedule (Community Parks)**

| ITE LUC | Land Use | Unit | Uninc. County Residents per Unit ⁽¹⁾ | Community Parks | | | |
|--|-------------------------------------|------|---|--------------------------------------|-------------------------------|---------------------------|---------------------------------|
| | | | | Net Cost per Resident ⁽²⁾ | Net Impact Fee ⁽³⁾ | Admin. Fee ⁽⁴⁾ | Total Impact Fee ⁽⁵⁾ |
| <i>With Sales Tax Credit</i> | | | | | | | |
| 210 | Single Family (Detached) | du | 2.02 | \$167.51 | \$338.37 | \$8.32 | \$347 |
| 220/230 | Multi-Family/Single Family Attached | du | 1.07 | \$167.51 | \$179.24 | \$4.41 | \$184 |
| 240 | Mobile Home | du | 1.07 | \$167.51 | \$179.24 | \$4.41 | \$184 |
| 310/320 | Hotel/Motel | room | 0.68 | \$167.51 | \$113.91 | \$2.80 | \$117 |
| <i>Without Sales Tax Credit</i> | | | | | | | |
| 210 | Single Family (Detached) | du | 2.02 | \$194.07 | \$392.02 | \$9.64 | \$402 |
| 220/230 | Multi-Family/Single Family Attached | du | 1.07 | \$194.07 | \$207.65 | \$5.11 | \$213 |
| 240 | Mobile Home | du | 1.07 | \$194.07 | \$207.65 | \$5.11 | \$213 |
| 310/320 | Hotel/Motel | room | 0.68 | \$194.07 | \$131.97 | \$3.25 | \$135 |

(1) Source: Appendix A, Table A-3, except hotel/motel, which is Table A-11

(2) Source: Table VI-8

(3) Residents per unit (Item 1) for each land use category multiplied by the net cost per resident (Item 2)

(4) An administrative fee is assessed at 2.46% of the net impact fee (Item 3)

(5) Sum of the net impact fee (Item 3) and the administrative fee (Item 4)

**Table VI-11
Calculated Parks & Recreation Impact Fee Schedule (Regional/Specialty Parks)**

| ITE LUC | Land Use | Unit | Countywide Residents per Unit ⁽¹⁾ | Regional/Specialty Parks | | | |
|--|-------------------------------------|------|--|--------------------------------------|-------------------------------|---------------------------|---------------------------------|
| | | | | Net Cost per Resident ⁽²⁾ | Net Impact Fee ⁽³⁾ | Admin. Fee ⁽⁴⁾ | Total Impact Fee ⁽⁵⁾ |
| <i>With Sales Tax Credit</i> | | | | | | | |
| 210 | Single Family (Detached) | du | 2.00 | \$209.40 | \$418.80 | \$10.30 | \$429 |
| 220/230 | Multi-Family/Single Family Attached | du | 1.06 | \$209.40 | \$221.96 | \$5.46 | \$227 |
| 240 | Mobile Home | du | 1.09 | \$209.40 | \$228.25 | \$5.61 | \$234 |
| 310/320 | Hotel/Motel | room | 0.68 | \$209.40 | \$142.39 | \$3.50 | \$146 |
| <i>Without Sales Tax Credit</i> | | | | | | | |
| 210 | Single Family (Detached) | du | 2.00 | \$386.87 | \$773.74 | \$19.03 | \$793 |
| 220/230 | Multi-Family/Single Family Attached | du | 1.06 | \$386.87 | \$410.08 | \$10.09 | \$420 |
| 240 | Mobile Home | du | 1.09 | \$386.87 | \$421.69 | \$10.37 | \$432 |
| 310/320 | Hotel/Motel | room | 0.68 | \$386.87 | \$263.07 | \$6.47 | \$270 |

(1) Source: Appendix A, Table A-2, except hotel/motel, which is Table A-11

(2) Source: Table VI-9

(3) Residents per unit (Item 1) for each land use category multiplied by the net cost per resident (Item 2)

(4) An administrative fee is assessed at 2.46% of the net impact fee (Item 3)

(5) Sum of the net impact fee (Item 3) and the administrative fee (Item 4)

**Table VI-12
Calculated Parks & Recreation Impact Fee Schedule**

| ITE LUC | Land Use | Unit | Regional/Specialty Parks | | | Community & Regional/Specialty Parks | | |
|--|-------------------------------------|------|--------------------------------------|-----------------------------------|-------------------------------|--------------------------------------|-----------------------------------|-------------------------------|
| | | | Calculated Impact Fee ⁽¹⁾ | Adopted Impact Fee ⁽²⁾ | Percent Change ⁽³⁾ | Calculated Impact Fee ⁽⁴⁾ | Adopted Impact Fee ⁽⁵⁾ | Percent Change ⁽⁶⁾ |
| <i>With Sales Tax Credit</i> | | | | | | | | |
| 210 | Single Family (Detached) | du | \$429 | \$672 | -36.2% | \$776 | \$672 | 15.5% |
| 220/230 | Multi-Family/Single Family Attached | du | \$227 | \$449 | -49.4% | \$411 | \$449 | -8.5% |
| 240 | Mobile Home | du | \$234 | \$475 | -50.7% | \$418 | \$475 | -12.0% |
| 310/320 | Hotel/Motel | room | \$146 | \$147 | -0.7% | \$263 | \$147 | 78.9% |
| <i>Without Sales Tax Credit</i> | | | | | | | | |
| 210 | Single Family (Detached) | du | \$793 | \$672 | 18.0% | \$1,195 | \$672 | 77.8% |
| 220/230 | Multi-Family/Single Family Attached | du | \$420 | \$449 | -6.5% | \$633 | \$449 | 41.0% |
| 240 | Mobile Home | du | \$432 | \$475 | -9.1% | \$645 | \$475 | 35.8% |
| 310/320 | Hotel/Motel | room | \$270 | \$147 | 83.7% | \$405 | \$147 | 175.5% |

(1) Source: Table VI-11

(2) Source: Charlotte County Community Development Department; Fees include 2.46% administrative fee; Fees have been adopted at 36% in 2009 and reduced approximately 20% since 2009 through annual indexing; **Fees are currently suspended**

(3) Percent change from the adopted fee rate (Item 2) to the calculated fee rate (Item 1)

(4) Sum of the total impact fee (Item 5) from Table VI-10 and the total impact fee (Item 5) from Table VI-11 for each land use

(5) Source: Charlotte County Community Development Department; Fees include 2.46% administrative fee; Fees have been reduced approximately 20% since 2009 through annual indexing; **Fees are currently suspended**

(6) Percent change from the adopted fee rate (Item 5) to the calculated fee rate (Item 4)

Parks & Recreation Impact Fee Schedule Comparison

As part of the work effort in updating Charlotte County’s parks & recreation impact fee schedule, the County’s calculated impact fee schedule was compared to the adopted fee schedule and those in similar or nearby jurisdictions. Table VI-13 presents this comparison.

TECHNICAL

**Table VI-13
Calculated Parks & Recreation Impact Fee Schedule Comparison**

| Land Use | Unit ⁽²⁾ | Charlotte County | | | Polk County ⁽⁶⁾ | Pasco County ⁽⁷⁾ | Collier County ⁽⁸⁾ | Lake County ⁽⁹⁾ | Lee County ⁽¹⁰⁾ | Martin County ⁽¹¹⁾ | Indian River County ⁽¹²⁾ | Manatee County ⁽¹³⁾ | Sarasota County ⁽¹⁴⁾ | Desoto County ⁽¹⁵⁾ | City of Punta Gorda ⁽¹⁶⁾ | City of North Port ⁽¹⁷⁾ | City of Venice ⁽¹⁸⁾ |
|---------------------------|---------------------|--------------------------|---------------------|-------------------------|----------------------------|-----------------------------|-------------------------------|----------------------------|----------------------------|-------------------------------|-------------------------------------|--------------------------------|---------------------------------|-------------------------------|-------------------------------------|------------------------------------|--------------------------------|
| | | All Parks ⁽³⁾ | | Existing ⁽⁵⁾ | | | | | | | | | | | | | |
| | | Scenario 1 (w/ST) | Scenario 2 (w/o ST) | | | | | | | | | | | | | | |
| Date of Last Update | - | 2014 | 2014 | 2009 | 2009 | 2001 | 2010 | 2003 | 2011 | 2012 | 2009 | 2011 | 2007 | 2006 | 2011 | 2011 | n/a |
| Adoption % ⁽¹⁾ | - | 100% | 100% | 36% | 50% | 100% | 100% | 95% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 43% | n/a |
| Residential: | | | | | | | | | | | | | | | | | |
| Single Family (2,000 sf) | du | \$776 | \$1,195 | \$672 | \$242 | \$892 | \$3,133 | \$222 | \$1,521 | \$2,001 | \$1,500 | \$1,494 | \$2,401 | \$291 | \$1,162 | \$559 | \$2,401 |
| Multi-Family | du | \$411 | \$633 | \$449 | \$181 | \$627 | \$1,685 | \$171 | \$1,131 | \$2,001 | \$906 | \$1,286 | \$2,401 | \$291 | \$614 | \$329 | \$2,401 |
| Mobile Home | du | \$418 | \$645 | \$475 | \$173 | \$627 | \$2,393 | \$177 | \$1,055 | \$2,001 | \$966 | \$559 | \$1,594 | \$291 | \$631 | \$274 | \$1,594 |

(1) Represents the portion of the maximum calculated fee that was originally adopted
(2) Du = dwelling unit
(3) Source: Table VI-12, calculated impact fee (Item 4) for Scenario 1
(4) Source: Table VI-12, calculated impact fee (Item 4) for scenario 2
(5) Source: Charlotte County Community Development Department; Fees include 2.46% administrative fee; Fees have been adopted at 36% in 2009 and been reduced approximately 20% since 2009 through annual indexing; Fees are currently suspended
(6) Source: Polk County Building & Construction Department; Sum of "regional" and "area" parks. Fees are currently suspended through July 2015
(7) Source: Pasco County Central Permitting Department
(8) Source: Collier County Impact Fee Administration Department; Sum of "community" and "regional" parks
(9) Source: Lake County Growth Management Department, Development Processing Division
(10) Source: Lee County Community Development Department; Sum of "community" and "regional" parks; Fees include 1.0% administration fee; Fees are currently reduced by 80% through March 2015
(11) Source: Martin County Growth Management Department; Fees include 1.5% administration fee
(12) Source: Indian River County Planning Division; Fees include 2.5% administration fee
(13) Source: Manatee County Financial Management Department, Impact Fee Administration
(14) Source: Sarasota County Planning & Development Services; Fees include 2.25% administration fee
(15) Source: Desoto County Planning & Zoning Department; Fees are currently suspended through November 2014
(16) Source: City of Punta Gorda Zoning Department; City charges its own fee as well as a portion of the County's fee; County fee is currently suspended
(17) Source: City of North Pot Economic Development Department
(18) Source: City of Venice Building and Code Enforcement; Sarasota County impact fee rates are charged within the City of Venice; Fees include 2.25% administration fee

VII. Indexing

In many cases, impact fee revenues are reviewed periodically (every three to five years, etc.) as opposed to being reviewed on an annual basis. If no adjustment to the impact fee schedule is made during this period, a situation can be created where major adjustment to the impact fee schedule likely become necessary due to the time between adjustments. During periods of cost increases, the need for significant adjustments also creates major concerns in the development community. To address this issue, the calculated fees included in this report could be indexed annually for construction, land, and equipment cost increases, as appropriate.

It should be noted that indexing has been a common practice used by several jurisdictions until recently, when costs, after a period of sharp increase, started to decrease. Given this large fluctuation and, in the case of building and equipment costs, inability of national indices to reflect the changes in local costs, some jurisdictions started to either supplement indexing calculations with local bids, use a shorter time period than five years, or a combination of both.

The remainder of this section details the method for developing an index for each of the fee areas in Charlotte County. Cost trends and indices since 2000 are used for illustrative purposes, but it is important to supplement this data with changes observed through recent purchases and construction.

Land Cost

As shown in Table VII-1, between 2000 and 2013, the just value of vacant land fluctuated significantly. Although the overall increase between 2000 and 2013 figures results in an annualized average increase of 2.15 percent countywide, an average of annual changes would have resulted in an increase of 9.3 percent. Figure 1 presents the change in the County's taxable values since 1977. As shown in the graph, the period between 2003 and 2011 was highly volatile and is not representative of a longer term trend. As such, the County should use caution when calculating the land index and supplement it by a longer trend and changes observed through recent purchases.

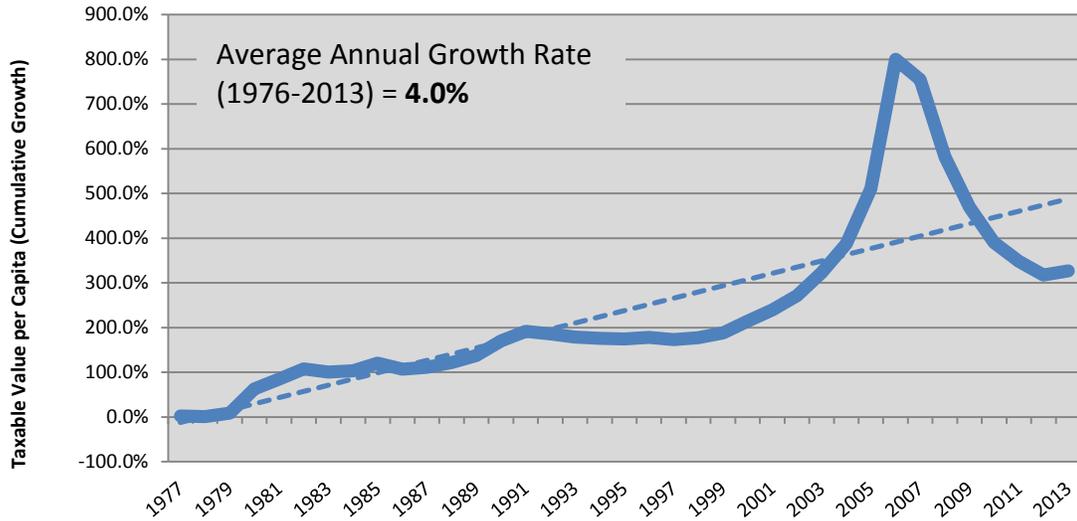
**Table VII-1
Charlotte County Property Value Increase**

| Year | Just Value (Vacant Property) | Percent Change |
|--|---------------------------------|-------------------|
| 2000 | \$930,718,326 | - |
| 2001 | \$1,020,780,321 | 9.68% |
| 2002 | \$1,153,329,441 | 12.99% |
| 2003 | \$1,548,444,689 | 34.26% |
| 2004 | \$2,269,823,838 | 46.59% |
| 2005 | \$4,074,592,365 | 79.51% |
| 2006 | \$7,949,446,892 | 95.10% |
| 2007 | \$6,279,250,817 | -21.01% |
| 2008 | \$3,657,028,346 | -41.76% |
| 2009 | \$2,300,510,454 | -37.09% |
| 2010 | \$1,743,546,928 | -24.21% |
| 2011 | \$1,450,472,557 | -16.81% |
| 2012 | \$1,269,664,808 | -12.47% |
| 2013 | \$1,226,982,019 | -3.36% |
| Average (2000-2013)⁽¹⁾ | | 2.15% |

Source: Florida Property Valuations and Tax Databook. Real Property Only

(1) Calculated based on the difference between 2000 and 2013, distributed evenly over time. An average of annual percent change results in an average change of 9.3% due to the large fluctuations.

**Figure VII-1
Charlotte County Taxable Value per Capita (Cumulative Growth)**



FDOT Project Cost

The Florida Department of Transportation (FDOT) provides projected inflation rates for transportation project costs, which are presented in Table VII-2. These inflation rates were applied to the design, construction, and construction engineering/inspection components of the transportation impact fee unit construction cost.

**Table VII-2
FDOT Project Cost Inflation Index**

| Year | Inflation Factor |
|-------------|------------------|
| 2013 | Base |
| 2014 | 3.1% |
| 2015 | 2.9% |
| 2016 | 2.9% |
| 2017 | 2.9% |
| 2018 | 2.9% |
| 2019 | 3.0% |
| 2020 | 3.1% |
| 2021 | 3.2% |
| 2022 | 3.3% |
| 2023 | 3.3% |
| Avg. | 3.1% |

Source: FDOT Policy Planning Department, March 2013

Building Construction Cost

For building construction costs, a common index used in the building cost index provided by Engineering-News Record for indexing purposes. Table VII-3 presents the annual construction cost change over the past 14 years, which average 3.14 percent annually.

**Table VII-3
Building Construction Cost Index**

| Year | Annual Avg Cost Index | Percent Change |
|----------------------------|----------------------------------|---------------------------|
| 2000 | 3,539 | - |
| 2001 | 3,574 | 0.99% |
| 2002 | 3,623 | 1.37% |
| 2003 | 3,693 | 1.93% |
| 2004 | 3,984 | 7.88% |
| 2005 | 4,205 | 5.55% |
| 2006 | 4,369 | 3.90% |
| 2007 | 4,485 | 2.66% |
| 2008 | 4,691 | 4.59% |
| 2009 | 4,769 | 1.66% |
| 2010 | 4,883 | 2.39% |
| 2011 | 5,058 | 3.58% |
| 2012 | 5,174 | 2.29% |
| 2013 | 5,278 | 2.01% |
| Average (2000-2013) | | 3.14% |

Source: Engineering News-Record (ENR)
historical building cost indices

Equipment Cost

For equipment costs, it is recommended that the Consumer Price Index (CPI) provided by the US Department of Labor, Bureau of Labor Statistics, be used for indexing purposes. Table VII-4 presents the annual CPI cost increase over the last 14 years, which averages 2.31 percent annually.

**Table VII-4
Equipment Cost Index – South Region**

| Year | Annual Avg Cost Index | Percent Change |
|----------------------------|-----------------------|----------------|
| 2000 | 107.40 | - |
| 2001 | 109.60 | 2.05% |
| 2002 | 110.80 | 1.09% |
| 2003 | 113.10 | 2.08% |
| 2004 | 116.20 | 2.74% |
| 2005 | 120.00 | 3.27% |
| 2006 | 123.90 | 3.25% |
| 2007 | 127.42 | 2.84% |
| 2008 | 132.62 | 4.08% |
| 2009 | 132.07 | -0.41% |
| 2010 | 134.41 | 1.77% |
| 2011 | 139.20 | 3.57% |
| 2012 | 142.07 | 2.06% |
| 2013 | 144.32 | 1.58% |
| Average (2000-2013) | | 2.31% |

Source: Bureau of Labor Statistics (BLS),
Consumer Price Index (CPI); South Region

Application

The following sub-sections present the calculated indices for each of the fee areas previously presented in this study, as well as the transportation impact fee.

Indexing for the Transportation Impact Fee Schedule

To index Charlotte County’s transportation impact fee schedule, a combined index must first be calculated. Table VII-5 presents the distribution of the phase costs from the Charlotte County Transportation Impact Fee Technical Study completed in September 2013, as well as the percent of the total costs for these phases. The FDOT project cost index (Table VII-2) and the land cost index (Table VII-1) were then weighted by this distribution to develop the total applicable index for the transportation impact fee. To calculate the indexed impact fee, the total impact fee should be increased by 2.8 percent.

**Table VII-5
Transportation Indexing Application**

| Calculation Step | Distribution of Phase Costs ⁽¹⁾ | Percent of Total Cost ⁽²⁾ | Annual Increase ⁽³⁾ | Index ⁽⁴⁾ |
|---|--|--------------------------------------|--------------------------------|----------------------|
| Design/Construction/CEI | \$2,709,600 | 71.9% | 3.1% | 2.2% |
| Right-of-Way | \$1,061,260 | 28.1% | 2.2% | 0.6% |
| Total Unit Construction Cost | \$3,770,860 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 2.8% |

(1) Source: Charlotte County Transportation Impact Fee Technical Report, September 2013; Table 3

(2) Distribution of design/construction/CEI and ROW as part of the total unit construction cost

(3) Source: Table VII-1 for right-of-way and Table VII-2 for design/construction/CEI

(4) Percent of total cost (Item 2) for each component multiplied by the annual increase (Item 3)

(5) Sum of the index components (Item 4) for design/construction/CEI and right-of-way

Indexing for the Public Buildings Impact Fee Schedule

Similar to transportation, a combined index was calculated for the public buildings impact fee schedule. Table VII-6 presents the distribution of the County's inventory of land and building costs for public buildings. The land cost index (Table VII-1) and the building construction cost index (Table VII-3) were then weighted by this distribution to develop the total applicable index for the public buildings impact fee. To calculate the indexed impact fee, the fees should be increased by 3.1 percent.

**Table VII-6
Public Buildings Indexing Application**

| Calculation Step | Distribution of Inventory ⁽¹⁾ | Percent of Total Cost ⁽²⁾ | Annual Increase ⁽³⁾ | Index ⁽⁴⁾ |
|---|--|--------------------------------------|--------------------------------|----------------------|
| Land Value | \$10,632,000 | 7.1% | 2.2% | 0.2% |
| Building Value | \$139,409,100 | 92.9% | 3.1% | 2.9% |
| Total Asset Value | \$150,041,100 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 3.1% |

(1) Source: Table II-4

(2) Distribution of land and building inventory as part of the total asset value

(3) Source: Table VII-1 for land and Table VII-3 for buildings

(4) Percent of total cost (Item 2) for each component multiplied by the annual increase (Item 3)

(5) Sum of the index components (Item 4) for land and buildings

Indexing for the Library Facilities Impact Fee Schedule

Similar to other program areas, a combined index was calculated for the library facilities impact fee schedule. Table VII-7 presents the distribution of the County's inventory of land, building, and equipment costs for library facilities. The land cost index (Table VII-1), the

building construction cost index (Table VII-3), and the equipment cost index (Table VII-4) were then weighted by this distribution to develop the total applicable index for the library facilities impact fee. To calculate the indexed impact fee, the fees should be increased by 2.8 percent.

**Table VII-7
Library Facilities Indexing Application**

| Calculation Step | Distribution of Inventory ⁽¹⁾ | Percent of Total Cost ⁽²⁾ | Annual Increase ⁽³⁾ | Index ⁽⁴⁾ |
|---|--|--------------------------------------|--------------------------------|----------------------|
| Land Value | \$302,000 | 1.1% | 2.2% | 0.0% |
| Building Value | \$17,459,040 | 63.4% | 3.1% | 2.0% |
| Materials/Equipment Value | \$9,763,869 | 35.5% | 2.3% | 0.8% |
| Total Asset Value | \$27,524,909 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 2.8% |

(1) Source: Table III-7

(2) Distribution of the land, building, and materials/equipment value as part of the total asset value

(3) Source: Table VII-1 for land, Table VII-3 for buildings, and Table VII-4 for materials/equipment

(4) Percent of total cost (Item 2) for each component multiplied by the annual increase (Item 3)

(5) Sum of the index components (Item 4) for land, buildings, and materials/equipment

Indexing for the Fire/EMS Impact Fee Schedule

Similar to other program areas, a combined index was calculated for the Fire/EMS impact fee schedule. Table VII-8 presents the distribution of the County's inventory of land, building, and equipment costs for Fire/EMS facilities. The land cost index (Table VII-1), the building construction cost index (Table VII-3), and the equipment cost index (Table VII-4) were then weighted by this distribution to develop the total applicable index for the Fire/EMS impact fee. To calculate the indexed impact fee, the impact fees should be increased by 2.7 percent.

**Table VII-8
Fire/EMS Indexing Application**

| Calculation Step | Distribution of Inventory ⁽¹⁾ | Percent of Total Cost ⁽²⁾ | Annual Increase ⁽³⁾ | Index ⁽⁴⁾ |
|---|--|--------------------------------------|--------------------------------|----------------------|
| Land Value | \$1,493,400 | 3.1% | 2.2% | 0.1% |
| Building Value | \$24,200,050 | 49.5% | 3.1% | 1.5% |
| Vehicle/Equipment Value | \$23,178,121 | 47.4% | 2.3% | 1.1% |
| Total Asset Value | \$48,871,571 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 2.7% |

- (1) Source: Table IV-6; Fire and EMS combined
- (2) Distribution of the land, building, and vehicle/equipment values as part of the total asset value
- (3) Source: Table VII-1 for land, Table VII-3 for buildings, and Table VII-4 for vehicles/equipment
- (4) Percent of total cost (Item 2) multiplied by the annual increase (Item 3)
- (5) Sum of the index components (Item 4) for land, building, and vehicles/equipment

Indexing for the Law Enforcement/Correctional Facilities Impact Fee Schedule

Similar to other program areas, a combined index was calculated for the Law Enforcement and Correctional Facilities impact fee schedule. Table VII-8 presents the distribution of the County’s inventory of land, building, and equipment costs for these facilities. The land cost index (Table VII-1), the building construction cost index (Table VII-3), and the equipment cost index (Table VII-4) were then weighted by this distribution to develop the total applicable index for the law enforcement and correctional facilities impact fee. To calculate the indexed impact fee, the impact fees should be increased by 2.9 percent.

**Table VII-9
Law Enforcement/Correctional Facility Indexing Application**

| Calculation Step | Distribution of Inventory ⁽¹⁾ | Percent of Total Cost ⁽²⁾ | Annual Increase ⁽³⁾ | Index ⁽⁴⁾ |
|---|--|--------------------------------------|--------------------------------|----------------------|
| Land Value | \$1,384,500 | 1.2% | 2.2% | 0.0% |
| Building Value | \$91,159,200 | 80.7% | 3.1% | 2.5% |
| Vehicle/Equipment Value | \$20,408,001 | 18.1% | 2.3% | 0.4% |
| Total Asset Value | \$112,951,701 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 2.9% |

- (1) Source: Table V-5
- (2) Distribution of land, building, and vehicle/equipment value as part of the total asset value
- (3) Source: Table VII-1 for land, Table VII-3 for buildings, and Table VII-4 for vehicles/equipment
- (4) Percent of total cost (Item 2) multiplied by the annual increase (Item 3)
- (5) Sum of the index components (Item 4) for land, building, and vehicles/equipment

Indexing for the Parks & Recreation Impact Fee Schedule

Similar to other program areas, a combined index was calculated for the Parks & Recreation impact fee schedule. Table VII-10 presents the distribution of the County’s inventory of land, building, and equipment costs for Parks & Recreation facilities. The land cost index (Table VII-1) and the equipment cost index (Table VII-4) were then weighted by this distribution to develop the total applicable index for the Parks & Recreation impact fee. To calculate the indexed impact fee, the impact fees should be increased by 2.3 percent.

**Table VII-10
Parks & Recreation Indexing Application**

| Calculation Step | Distribution of Inventory ⁽¹⁾ | Percent of Total Cost ⁽²⁾ | Annual Increase ⁽³⁾ | Index ⁽⁴⁾ |
|---|--|--------------------------------------|--------------------------------|----------------------|
| Community Parks: | | | | |
| Land Value | \$3,828,450 | 10.4% | 2.2% | 0.2% |
| Facility/Equipment Value | <u>\$32,875,411</u> | 89.6% | 2.3% | 2.1% |
| Total Asset Value | \$36,703,861 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 2.3% |
| Regional/Specialty Parks: | | | | |
| Land Value | \$25,821,000 | 32.6% | 2.2% | 0.7% |
| Facility/Equipment Value | <u>\$53,428,297</u> | 67.4% | 2.3% | 1.6% |
| Total Asset Value | \$79,249,297 | | | |
| Total Applicable Index⁽⁵⁾ | | | | 2.3% |

(1) Source: Tables VI-1 and VI-5

(2) Distribution of the land and facility/equipment values as part of the total asset value

(3) Source: Table VII-1 for land and Table VII-4 for facilities/equipment

(4) Percent of total cost (Item 2) multiplied by the annual increase (Item 3)

(5) Sum of the index components (Item 4) for land and facilities/equipment

TECHNICAL

Appendix A
Supplemental Population Information

Functional Population

All impact fee program areas included in this report require the use of population data in calculating current levels-of-service, performance standards, and future demand for capital facilities. With this in mind, a consistent approach to developing population estimates and projections is an important component of the data compilation process. To accurately determine demand for services, Charlotte County's Comprehensive Plan considers not only the resident, or permanent population of the County, but also the seasonal residents and visitors as well. Seasonal residents include visitors to hotel and motel facilities, visitors to RV parks, visitors that stay with relatives and friends, and part-time residents, which are defined as living in Charlotte County for less than six months each year. Therefore, for purposes of calculating future demand for capital facilities for each impact fee program area, the weighted average seasonal population will be used in all population estimates and projections. References to population contained in subsequent chapters of this report pertain to the weighted average seasonal population, unless otherwise noted.

Charlotte County provides all of the services included in the impact fee program countywide, with the exception of the following program areas:

- Community parks and recreation services, which are provided in the unincorporated county;
- Fire services, which are provided in the unincorporated county with the exception of the Englewood Fire District

Given the differences in service areas, population estimates and projections are provided separately for these three areas.

Table A-1 presents the population trend for Charlotte County. The projections indicate that the population of Charlotte County is projected to increase by 25 percent between 2014 and 2040 countywide.

**Table A-1
Weighted Population Trends and Projections**

| Year | Weighted Seasonal Population | | |
|------|------------------------------|--------------------------------------|---|
| | Countywide ⁽¹⁾ | Unincorporated County ⁽²⁾ | Unincorporated w/o Englewood Fire District ⁽³⁾ |
| 2000 | 154,274 | 138,649 | 112,099 |
| 2001 | 157,659 | 141,892 | 114,760 |
| 2002 | 161,245 | 145,121 | 117,371 |
| 2003 | 164,360 | 147,923 | 119,638 |
| 2004 | 167,951 | 151,156 | 122,252 |
| 2005 | 166,670 | 150,004 | 121,320 |
| 2006 | 170,042 | 153,038 | 123,774 |
| 2007 | 173,790 | 156,412 | 126,503 |
| 2008 | 174,278 | 156,850 | 126,857 |
| 2009 | 173,886 | 156,497 | 126,571 |
| 2010 | 174,168 | 156,051 | 126,077 |
| 2011 | 174,755 | 156,523 | 126,447 |
| 2012 | 177,752 | 159,271 | 128,680 |
| 2013 | 178,177 | 159,576 | 128,913 |
| 2014 | 180,425 | 162,382 | 131,332 |
| 2015 | 182,707 | 164,436 | 132,992 |
| 2016 | 184,455 | 166,010 | 134,265 |
| 2017 | 186,220 | 167,598 | 135,550 |
| 2018 | 188,001 | 169,201 | 136,846 |
| 2019 | 189,800 | 170,820 | 138,156 |
| 2020 | 191,636 | 172,473 | 139,492 |
| 2021 | 193,320 | 173,987 | 140,717 |
| 2022 | 195,020 | 175,518 | 141,955 |
| 2023 | 196,736 | 177,063 | 143,204 |
| 2024 | 198,466 | 178,620 | 144,463 |
| 2025 | 200,237 | 180,213 | 145,753 |
| 2026 | 201,858 | 181,672 | 146,932 |
| 2027 | 203,493 | 183,143 | 148,122 |
| 2028 | 205,142 | 184,628 | 149,324 |
| 2029 | 206,804 | 186,123 | 150,532 |
| 2030 | 208,491 | 187,643 | 151,761 |
| 2031 | 209,913 | 188,921 | 152,795 |
| 2032 | 211,345 | 190,211 | 153,838 |
| 2033 | 212,788 | 191,509 | 154,888 |
| 2034 | 214,242 | 192,818 | 155,946 |
| 2035 | 215,706 | 194,135 | 157,012 |
| 2036 | 217,180 | 195,463 | 158,085 |
| 2037 | 218,664 | 196,797 | 159,165 |
| 2038 | 220,158 | 198,142 | 160,252 |
| 2039 | 221,662 | 199,496 | 161,348 |
| 2040 | 223,154 | 200,839 | 162,434 |

(1) Source: Appendix A, Table A-14

(2) Source: Appendix A, Table A-15

(3) Source: Appendix A, Table A-16

Apportionment of Demand by Residential Unit Type and Size

The residential land uses to be used for the impact fee calculations are the following:

- Single Family Detached
- Multi-Family/Single Family Attached
- Mobile Home

Table A-2 presents the number of residents per housing unit for the residential categories identified above in Charlotte County. This analysis includes all housing units, both occupied and vacant. Because the 2010 Census data does not provide population by land use, a comparison of weighted average population per housing units between the 2000 and the 2010 Census data sets was conducted and the resulting ratio was applied to the residents per housing unit figure for each land use.

**Table A-2
Residents per Housing Unit (Countywide)**

| Housing Type | Population ⁽¹⁾ | Housing Units ⁽²⁾ | Residents / Housing Units ⁽³⁾ | Residents / Housing Units with 2010 Adj ⁽⁴⁾ |
|-------------------------------|---------------------------|------------------------------|--|--|
| Single Family Detached | 120,159 | 53,539 | 2.24 | 2.00 |
| Multi-Family | 16,819 | 14,079 | 1.19 | 1.06 |
| Mobile Home | 14,169 | 11,611 | 1.22 | 1.09 |
| Total/Weighted Average | 151,147 | 79,229 | 1.91 | 1.70 |

(1) Source: 2000 Census, Table H-33 (adjusted for weighted seasonal population)

(2) Source: 2000 Census, Table H-30

(3) Population (Item 1) divided by housing units (Item 2)

(4) Residents per housing unit based on Census 2000 are adjusted downward by 10.9% to reflect the decrease in people per housing unit between 2000 and 2010

Tables A-3 and A-4 present the residents per housing analysis for the unincorporated and the unincorporated excluding Englewood Fire District study areas, respectively.

**Table A-3
Residents per Housing Unit (Unincorporated)**

| Housing Type | Population ⁽¹⁾ | Housing Units ⁽²⁾ | Residents / Housing Units ⁽³⁾ | Residents / Housing Units with 2010 Adj ⁽⁴⁾ |
|-------------------------------|---------------------------|------------------------------|--|--|
| Single Family Detached | 108,737 | 47,873 | 2.27 | 2.02 |
| Multi-Family | 13,848 | 11,528 | 1.20 | 1.07 |
| Mobile Home | 13,105 | 10,913 | 1.20 | 1.07 |
| Total/Weighted Average | 135,690 | 70,314 | 1.93 | 1.72 |

- (1) Source: 2000 Census, Table H-33 (adjusted for weighted seasonal population)
- (2) Source: 2000 Census, Table H-30
- (3) Population (Item 1) divided by housing units (Item 2)
- (4) Residents per housing unit based on Census 2000 are adjusted downward by 10.9% to reflect the decrease in people per housing unit between 2000 and 2010

**Table A-4
Residents per Housing Unit (Unincorporated & excluding Englewood Fire District)**

| Housing Type | Population ⁽¹⁾ | Housing Units ⁽²⁾ | Residents / Housing Units ⁽³⁾ | Residents / Housing Units with 2010 Adj ⁽⁴⁾ |
|-------------------------------|---------------------------|------------------------------|--|--|
| Single Family Detached | 87,415 | 36,412 | 2.40 | 2.14 |
| Multi-Family | 12,236 | 9,575 | 1.28 | 1.14 |
| Mobile Home | 10,308 | 7,897 | 1.31 | 1.17 |
| Total/Weighted Average | 109,959 | 53,884 | 2.04 | 1.82 |

- (1) Source: 2000 Census, Table H-33 (adjusted for weighted seasonal population)
- (2) Source: 2000 Census, Table H-30
- (3) Population (Item 1) divided by housing units (Item 2)
- (4) Residents per housing unit based on Census 2000 are adjusted downward by 10.9% to reflect the decrease in people per housing unit between 2000 and 2010

Functional Population

Functional population, as used in the impact fee analysis, is a generally accepted methodology for several impact fee areas and is based on the assumption that demand for certain facilities is generally proportional to the presence of people at a land use, including residents, employees, and visitors. It is not enough to simply add resident population to the number of employees, since the service-demand characteristics can vary considerably by type of industry.

Functional population is the equivalent number of people occupying space within a community on a 24-hour-day, 7-days-a-week basis. A person living and working in the community will have the functional population coefficient of 1.0. A person living in the community but working elsewhere may spend only 16 hours per day in the community on weekdays and 24 hours per day on weekends for a functional population coefficient of 0.76 (128-hour presence divided by 168 hours in one week). A person commuting into the county to work five days per week would have a functional population coefficient of 0.30 (50-hour presence divided by 168 hours in one week). Similarly, a person traveling into the community to shop at stores, perhaps averaging 8 hours per week, would have a functional population coefficient of 0.05.

Functional population thus tries to capture the presence of all people within the community, whether residents, workers, or visitors, to arrive at a total estimate of effective population need to be served.

This form of adjusting population to help measure real facility needs replaces the population approach of merely weighting residents two-thirds and workers one-third (Nelson and Nicholas 1992). By estimating the functional and weighted population per unit of land use across all major land uses in a community, an estimate of the demand for certain facilities and services in the present and future year can be calculated. The following paragraphs explain how functional population is calculated for residential and non-residential land uses.

Residential Functional Population

Developing the residential component of functional population is simpler than developing the non-residential component. It is generally estimated that people spend one-half to three-fourths of their time at home and the rest of each 24-hour day away from their place of residence. In developing the residential component of the Charlotte County functional population, an analysis of the County's population and employment characteristics was conducted. Based on this analysis, it was estimated that people, on average, spend 16.4 hours, or approximately 71 percent, of each 24-hour day at their place of residence and the other 29 percent away from home. This analysis is presented in Tables A-5 and A-6.

Table A-5
Charlotte County Population & Employment Characteristics

| Item/Calculation Step | Figure |
|---|---------|
| Workers who live and work in Charlotte County (2010) ⁽¹⁾ | 41,516 |
| Workers who live in Charlotte County but work elsewhere (2010) ⁽¹⁾ | 14,956 |
| Total workers living in the Charlotte ⁽²⁾ | 56,472 |
| Charlotte County Census population (2010) ⁽³⁾ | 159,978 |
| Total workers as a percent of population ⁽⁴⁾ | 35.3% |
| School age population (5-17 years) (2010) ⁽⁵⁾ | 17,333 |
| School age population as a percent of population ⁽⁶⁾ | 10.8% |
| Population net of workers and school age population ⁽⁷⁾ | 86,173 |
| Other population as a percent of total population ⁽⁸⁾ | 53.9% |

- (1) Source: Estimated based on data from the 2010 U.S. Census and the Bureau of Transportation Statistics, Census Transportation Planning Package (CTOO) Pt. 3
- (2) Sum of workers who live/work in Charlotte and workers who live elsewhere but work in Charlotte
- (3) Source: 2010 U.S. Census
- (4) Total workers living in Charlotte (Item 2) divided by the census population (Item 3)
- (5) Source: 2010 U.S. Census
- (6) School age population (Item 5) divided by the census population (Item 3)
- (7) Census population (Item 3) less total workers living in Charlotte County (Item 2) and school age population (Item 5)
- (8) Population net of worker and school age population (Item 7) divided by census population (Item 3)

Table A-6
Residential Coefficient for Functional Population

| Pop. Group | Hours at Residence ⁽¹⁾ | Percent of Population ⁽²⁾ | Effective Hours ⁽³⁾ |
|--|-----------------------------------|--------------------------------------|--------------------------------|
| Workers | 13 | 35.3% | 4.6 |
| Students | 15 | 10.8% | 1.6 |
| Other | 20 | 53.9% | 10.8 |
| Total Hours at Residence ⁽⁴⁾ | | | 17.0 |
| Residential Functional Population Coefficient⁽⁵⁾ | | | 70.8% |

- (1) Source: Assumed
- (2) Source: Table A-5
- (3) Hours at residence (Item 1) multiplied by percent of population (Item 2)
- (4) Sum of effective hours (Item 3)
- (5) Total hours at residence (Item 4) divided by 24

The resulting percentage from Table A-6 is used in the calculation of the residential coefficient for the 24-hour functional population. These actual calculations are presented in Table A-8.

Non-Residential Functional Population

Given the varying characteristics of non-residential land uses, developing the estimates of functional residents for non-residential land uses is more complicated than developing estimated functional residents for residential land uses. The method for estimating functional resident population uses trip generation data from the Institute of Transportation Engineers' (ITE) Trip Generation Manual and TOA's Trip Characteristics Database, information of passengers per vehicle, workers per vehicle, length of time spent at the land use, and other variables. Specific calculations include:

- Total one-way trips per employee (ITE trips multiplied by 50 percent to avoid double counting entering and exiting trips as two trips).
- Visitors per impact unit based on occupants per vehicle (trips multiplied by occupants per vehicle less employees).
- Worker hours per week per impact unit (such as nine worker-hours per day multiplied by five days in a work week).
- Visitor hours per week per impact unit (visitors multiplied by number of hours per day times relevant days in a week, such as five for offices and seven for retail shopping).
- Functional population coefficients per employee developed by estimating time spent by employees and visitors at each land use.

Table A-7 also shows the functional population coefficients for non-residential uses in Charlotte County. The functional population coefficients in Table A-7 were used to estimate the County's functional population in Table A-8 (for Countywide) and in Table A-9 (for unincorporated excluding Englewood Fire District).

**Table A-7
General Functional Population Coefficients**

| Population/ Employment Category | ITE LUC | Employee Hours In- Place ⁽¹⁾ | Trips per Employee ⁽²⁾ | One-Way Trips per Employee ⁽³⁾ | Journey-to- Work Occupants per Trip ⁽⁴⁾ | Daily Occupants per Trip ⁽⁵⁾ | Visitors per Employee ⁽⁶⁾ | Visitor Hours per Trip ⁽¹⁾ | Days per Week ⁽⁷⁾ | Functional Population Coefficient ⁽⁸⁾ |
|--|---------|---|--------------------------------------|---|--|---|---|--|---------------------------------|--|
| Population | | | | | | | | | | 0.708 |
| Natural Resources | n/a | 9.00 | 3.02 | 1.51 | 1.32 | 1.38 | 0.09 | 1.00 | 7.00 | 0.379 |
| Construction | 110 | 9.00 | 3.02 | 1.51 | 1.32 | 1.38 | 0.09 | 1.00 | 5.00 | 0.271 |
| Manufacturing | 140 | 9.00 | 2.13 | 1.07 | 1.32 | 1.38 | 0.06 | 1.00 | 5.00 | 0.270 |
| Transportation, Communication, Utilities | 110 | 9.00 | 3.02 | 1.51 | 1.32 | 1.38 | 0.09 | 1.00 | 5.00 | 0.271 |
| Wholesale Trade | 150 | 9.00 | 3.89 | 1.95 | 1.32 | 1.38 | 0.12 | 1.00 | 5.00 | 0.271 |
| Retail Trade | 820 | 9.00 | 52.41 | 26.20 | 1.24 | 1.73 | 12.84 | 1.50 | 7.00 | 1.177 |
| Finance, Insurance, Real Estate | 710 | 9.00 | 3.32 | 1.66 | 1.24 | 1.73 | 0.81 | 1.00 | 5.00 | 0.292 |
| Services ⁽⁹⁾ | n/a | 9.00 | 28.17 | 14.09 | 1.24 | 1.73 | 6.90 | 1.00 | 6.00 | 0.568 |
| Government ⁽¹⁰⁾ | 730 | 9.00 | 11.95 | 5.98 | 1.24 | 1.73 | 2.93 | 1.00 | 7.00 | 0.497 |

(1) Assumed

(2) Trips per employee represents all trips divided by the number of employees and is based on Trip Generation 9th Edition (Institute of Transportation Engineers 2012) as follows:

ITE Code 110 at 3.02 weekday trips per employee, page 93.

ITE Code 140 at 2.13 weekday trips per employee, page 164.

ITE Code 150 at 3.89 weekday trips per employee, page 193.

ITE Code 710 at 3.32 weekday trips per employee, page 1252.

ITE Code 730 at 11.95 weekday trips per employee, page 1304.

ITE Code 820 based on blended average of trips by retail center size calculated below, adapted from page 1561.

Trips per retail employee from the following table:

| Retail Scale | Assumed Center Size | Trip Rate per 1ksf | Trip Rate per sf | Sq Ft per Employee⁽¹¹⁾ | Trips per Employee | Share | Weighted Trips |
|---------------------------------|--------------------------------|-------------------------------|-----------------------------|--|-------------------------------|--------------|---------------------------|
| Neighborhood <50k sq.ft. | 50 | 86.56 | 0.087 | 802 | 69.77 | 40.0% | 27.91 |
| Community 50k-250k sq.ft. | 250 | 49.28 | 0.049 | 975 | 47.78 | 30.0% | 14.33 |
| Regional 250k-500k sq.ft. | 500 | 38.66 | 0.039 | 1,043 | 40.68 | 20.0% | 8.14 |
| Super Reg. 500k-1000k sq.ft. | 1,000 | 30.33 | 0.030 | 676 | 20.28 | 10.0% | 2.03 |
| Sum of Weighted Trips/1k sq.ft. | | | | | | | 52.41 |

(3) Trip per employee (Item 2) multiplied by 0.5.

(4) Journey-to-Work Occupants per Trip from 2001 Nationwide Household Travel Survey (FHWA 2001) as follows:

1.32 occupants per Construction, Manufacturing, TCU, and Wholesale trip

1.24 occupants per Retail Trade, FIRE, and Services trip

(5) Daily Occupants per Trip from 2001 Nationwide Household Travel Survey (FHWA 2001) as follows:

1.38 occupants per Construction, Manufacturing, TCU, and Wholesale trip

1.73 occupants per Retail Trade, FIRE, and Services trip

(6) [Daily occupants per trip (Item 5) multiplied by one-way trips per employee (Item 3)] - [(Journey-to-Work occupants per trip (Item 4) multiplied by one-way trips per employee (Item 3))]

(7) Typical number of days per week that indicated industries provide services and relevant government services are available.

(8) The equation to determine the Functional Population Coefficient per Employee for all land-use categories except residential includes the following:

$$\frac{((\text{Days per Week} \times \text{Employee Hours in Place}) + (\text{Visitors per Employee} \times \text{Visitor Hours per Trip} \times \text{Days per Week}))}{(24 \text{ Hours per Day} \times 7 \text{ Days per Week})}$$

(9) Trips per employee for the services category is the average trips per employee for the following service related land use categories: quality restaurant, high-turnover restaurant, supermarket, hotel, motel, elementary school, middle school, high school, hospital, medical office, and church. Source for the trips per employee figure from ITE, 9th ed., when available, or else derived from the square feet per employee for the appropriate land use category from the Energy Information Administration from Table B-1 of the Commercial Energy Building Survey (2003).

(10) Includes Federal Civilian Government, Federal Military Government, and State and Local Government categories.

(11) Square feet per retail employee from the Energy Information Administration from Table B-1 of the Commercial Energy Building Survey, 2003

**Table A-8
Countywide Functional Population – Year 2014**

| Population Category | 2014 Charlotte Baseline Data⁽¹⁾ | Functional Resident Coefficient⁽²⁾ | Functional Population⁽³⁾ |
|---|---|--|--|
| 2014 Total Weighted Population | 180,425 | 0.708 | 127,741 |
| <i>Employment Category</i> | | | |
| Natural Resources | 1,683 | 0.379 | 638 |
| Construction | 4,144 | 0.271 | 1,123 |
| Manufacturing | 779 | 0.270 | 210 |
| Transportation, Communication, and Utilities | 1,778 | 0.271 | 482 |
| Wholesale Trade | 1,009 | 0.271 | 273 |
| Retail Trade | 10,870 | 1.177 | 12,794 |
| Finance, Insurance, and Real Estate | 9,154 | 0.292 | 2,673 |
| Services | 32,445 | 0.568 | 18,429 |
| Government Services | 6,439 | 0.497 | 3,200 |
| Total Employment by Category Population | | | 39,822 |
| 2014 Total Functional Population⁽⁴⁾ | | | 167,563 |

(1) Source: Table A-1 for population and 2013 Woods & Poole for employment data

(2) Source: Table A-7

(3) The functional population is Charlotte County baseline data (Item 1) multiplied by the functional resident coefficient (Item 2)

(4) The total employment population by category is the sum of the employment figures from the nine employment categories (e.g., natural resources, construction, etc.)

(5) The total functional population is the sum of the residential functional population (127,741) and employment functional population (39,822)

Table A-9

Unincorporated & Excluding Englewood Fire District Functional Population – Year 2014

| Population Category | 2014 Charlotte Baseline Data⁽¹⁾ | Functional Resident Coefficient⁽²⁾ | Functional Population⁽³⁾ |
|---|---|--|--|
| 2014 Total Weighted Population | 131,332 | 0.708 | 92,983 |
| <i>Employment Category</i> | | | |
| Natural Resources | 1,224 | 0.379 | 464 |
| Construction | 3,015 | 0.271 | 817 |
| Manufacturing | 567 | 0.270 | 153 |
| Transportation, Communication, and Utilities | 1,293 | 0.271 | 350 |
| Wholesale Trade | 734 | 0.271 | 199 |
| Retail Trade | 7,908 | 1.177 | 9,308 |
| Finance, Insurance, and Real Estate | 6,660 | 0.292 | 1,945 |
| Services | 23,604 | 0.568 | 13,407 |
| Government Services | 4,684 | 0.497 | 2,328 |
| Total Employment by Category Population | | | 28,971 |
| 2014 Total Functional Population⁽⁴⁾ | | | 121,954 |

(1) Source: Table A-1 for population and 2013 Woods & Poole for employment data

(2) Source: Table A-7

(3) The functional population is Charlotte County baseline data (Item 1) multiplied by the functional resident coefficient (Item 2)

(4) The total employment population by category is the sum of the employment figures from the nine employment categories (e.g., natural resources, construction, etc.)

(5) The total functional population is the sum of the residential functional population (92,983) and employment functional population (28,971)

Table A-10 presents the County’s annual functional population figures from 2000 through 2040, based on the 2014 functional population figures from Table 8 and Table 9 and the annual population growth rates from the population figures previously presented in Table A-1.

Table A-10

Charlotte County Functional Population (2000-2040)

| Year | Functional Population Projections | |
|-------------|-----------------------------------|---|
| | Countywide ⁽¹⁾ | Unincorporated w/o Englewood Fire District ⁽²⁾ |
| 2000 | 143,307 | 104,300 |
| 2001 | 146,445 | 106,584 |
| 2002 | 149,769 | 109,003 |
| 2003 | 152,660 | 111,107 |
| 2004 | 155,988 | 113,529 |
| 2005 | 154,802 | 112,666 |
| 2006 | 157,929 | 114,942 |
| 2007 | 161,403 | 117,471 |
| 2008 | 161,855 | 117,800 |
| 2009 | 161,499 | 117,541 |
| 2010 | 161,757 | 117,729 |
| 2011 | 162,307 | 118,129 |
| 2012 | 165,082 | 120,149 |
| 2013 | 165,478 | 120,437 |
| 2014 | 167,563 | 121,954 |
| 2015 | 169,674 | 123,491 |
| 2016 | 171,303 | 124,677 |
| 2017 | 172,948 | 125,874 |
| 2018 | 174,608 | 127,082 |
| 2019 | 176,284 | 128,302 |
| 2020 | 177,994 | 129,547 |
| 2021 | 179,560 | 130,687 |
| 2022 | 181,140 | 131,837 |
| 2023 | 182,734 | 132,997 |
| 2024 | 184,342 | 134,167 |
| 2025 | 185,983 | 135,361 |
| 2026 | 187,489 | 136,457 |
| 2027 | 189,008 | 137,562 |
| 2028 | 190,539 | 138,676 |
| 2029 | 192,082 | 139,799 |
| 2030 | 193,657 | 140,945 |
| 2031 | 194,974 | 141,903 |
| 2032 | 196,300 | 142,868 |
| 2033 | 197,635 | 143,840 |
| 2034 | 198,979 | 144,818 |
| 2035 | 200,332 | 145,803 |
| 2036 | 201,694 | 146,794 |
| 2037 | 203,066 | 147,792 |
| 2038 | 204,447 | 148,797 |
| 2039 | 205,837 | 149,809 |
| 2040 | 207,216 | 150,813 |

(1) Source: Table A-8 for 2014 total functional population

(2) Source: Table A-9 for 2014 total functional population

Functional Residents by Specific Land Use Category

When a wide range of land uses impact services, an estimate of that impact is needed for each land use. This section presents functional population estimates by residential and non-residential land uses.

Residential and Transient Land Uses

As previously mentioned, the average number of persons per housing unit in Charlotte County was calculated for the single family, multi-family, and mobile home land uses, based on information obtained from the 2000 U.S. Census. Besides the residential land uses, the table also includes transient land uses, such as hotels, motels, nursing homes, and congregate care facilities. Secondary sources, such as the local Convention and Visitors Bureau (CVB) and the Florida Department of Elderly Affairs, are used to determine the occupancy rate for hotels, motels, and nursing homes land uses. As mentioned before, different functional population coefficients must be developed for each of the impact fee areas to be analyzed. For residential and transient land uses, these coefficients are displayed in Tables A-11 and A-12.

Non-Residential Land Uses

A similar approach is used to estimate functional residents for non-residential land uses. Table A-13 reports basic assumptions and calculations, such as trips per unit, trips per employee, employees per impact unit, one-way trips per impact unit, worker hours, occupants per vehicle trip, visitors (patrons, etc.) per impact unit, visitor hours per trip, and days per week for non-residential land uses. The final column in the tables shows the estimated functional resident coefficients by land use. These coefficients by land use create the demand component for the certain impact fee programs and will be used in the calculation of the cost per unit for each land use category in the select impact fee schedules.

Table A-11
Functional Residents for Residential and Transient Land Uses - Countywide

| Residential Land Use | Impact Unit | ITE LUC ⁽¹⁾ | Residents/Visitors Per Unit ⁽²⁾ | Occupancy Rate ⁽³⁾ | Adjusted Residents Per Unit ⁽⁴⁾ | Peak Visitor Hours at Place ⁽⁵⁾ | Workers Per Unit ⁽⁶⁾ | Work Day Hours ⁽⁷⁾ | Days Per Week ⁽⁸⁾ | Work Week Residents Per Unit ⁽⁹⁾ |
|----------------------------------|-------------|------------------------|--|-------------------------------|--|--|---------------------------------|-------------------------------|------------------------------|---|
| Residential | | | | | | | | | | |
| Single Family Detached | du | 210 | 2.00 | | | | | | | 1.42 |
| Multi-Family | du | 220 | 1.06 | | | | | | | 0.75 |
| Mobile Home | du | 240 | 1.09 | | | | | | | 0.77 |
| Transient/Assisted, Group | | | | | | | | | | |
| Congregate Care Facility | du | 253 | 1.20 | 82% | 0.98 | 16 | 0.45 | 9 | 7 | 0.83 |
| Hotel | room | 310 | 1.70 | 40% | 0.68 | 12 | 0.57 | 9 | 7 | 0.55 |
| Motel | room | 320 | 1.70 | 40% | 0.68 | 12 | 0.44 | 9 | 7 | 0.51 |
| Nursing Home | 1,000 sf | 620 | 1.00 | 82% | 0.82 | 16 | 0.84 | 9 | 7 | 1.72 |

(1) Land use code from the Institute of Transportation Engineers (ITE) Trip Generation Handbook, 9th Edition

(2) Estimates for the single family, multi-family, and mobile home land use from Table A-2; estimates for the hotel/motel land use is based on data obtained from other Florida jurisdictions. One person per bed is assumed for nursing homes. Estimate for Congregate Care Facility is based on people per household figures for single and multi-family homes, adjusted for the residents over 55 years of age based on information obtained from the 2001 National Household Travel Survey, prepared by the US Department of Transportation.

(3) Source for hotel/motel occupancy: Charlotte County Tourism. Source for nursing home/Congregate Care occupancy rate is based on occupancy information provided by the Florida Department of Elderly Affairs for Charlotte County for 2012 and 2013.

(4) Residents per unit times occupancy rate

(5), (7), (8) Estimated

(6) Adapted from ITE Trip Generation Handbook, 9th Edition

(9) For residential this is Residents Per Unit times 0.708. For Transient, Assisted, and Group it is:

$$\frac{[(\text{Adjusted Residents per Unit} \times \text{Hours at Place} \times \text{Days per Week}) + (\text{Workers Per Unit} \times \text{Work Hours Per Day} \times \text{Days per Week})]}{24 \text{ Hours per Day} \times 7 \text{ Days per Week}}$$

(24 Hours per Day X 7 Days per Week)

For nursing homes, this formula is multiplied by 2 to convert per bed figure to per 1,000 sf, based on the assumption of 2 beds per 1,000 sf.

Table A-12

Functional Residents for Residential and Transient Land Uses – Unincorporated & Excluding Englewood Fire District

| Residential Land Use | Impact Unit | ITE LUC ⁽¹⁾ | Residents/Visitors Per Unit ⁽²⁾ | Occupancy Rate ⁽³⁾ | Adjusted Residents Per Unit ⁽⁴⁾ | Peak Visitor Hours at Place ⁽⁵⁾ | Workers Per Unit ⁽⁶⁾ | Work Day Hours ⁽⁷⁾ | Days Per Week ⁽⁸⁾ | Work Week Residents Per Unit ⁽⁹⁾ |
|----------------------------------|-------------|------------------------|--|-------------------------------|--|--|---------------------------------|-------------------------------|------------------------------|---|
| Residential | | | | | | | | | | |
| Single Family Detached | du | 210 | 2.14 | | | | | | | 1.52 |
| Multi-Family | du | 220 | 1.14 | | | | | | | 0.81 |
| Mobile Home | du | 240 | 1.17 | | | | | | | 0.83 |
| Transient/Assisted, Group | | | | | | | | | | |
| Congregate Care Facility | du | 253 | 1.28 | 82% | 1.05 | 16 | 0.45 | 9 | 7 | 0.87 |
| Hotel | room | 310 | 1.70 | 40% | 0.68 | 12 | 0.57 | 9 | 7 | 0.55 |
| Motel | room | 320 | 1.70 | 40% | 0.68 | 12 | 0.44 | 9 | 7 | 0.51 |
| Nursing Home | 1,000 sf | 620 | 1.00 | 82% | 0.82 | 16 | 0.84 | 9 | 7 | 1.72 |

(1) Land use code from the Institute of Transportation Engineers (ITE) Trip Generation Handbook, 9th Edition
 (2) Estimates for the single family, multi-family, and mobile home land use from Table A-4; estimates for the hotel/motel land use is based on data obtained from other Florida jurisdictions. One person per bed is assumed for nursing homes. Estimate for Congregate Care Facility is based on people per household figures for single and multi-family homes, adjusted for the residents over 55 years of age based on information obtained from the 2001 National Household Travel Survey, prepared by the US Department of Transportation.
 (3) Source for hotel/motel occupancy: Charlotte County Tourism. Source for nursing home/Congregate Care occupancy rate is based on occupancy information provided by the Florida Department of Elderly Affairs for Charlotte County for 2012 and 2013.
 (4) Residents per unit times occupancy rate
 (5), (7), (8) Estimated
 (6) Adapted from ITE Trip Generation Handbook, 9th Edition
 (9) For residential this is Residents Per Unit times 0.708. For Transient, Assisted, and Group it is:

$$\frac{[(\text{Adjusted Residents per Unit} \times \text{Hours at Place} \times \text{Days per Week}) + (\text{Workers Per Unit} \times \text{Work Hours Per Day} \times \text{Days per Week})]}{(24 \text{ Hours per Day} \times 7 \text{ Days per Week})}$$
 For nursing homes, this formula is multiplied by 2 to convert per bed figure to per 1,000 sf, based on the assumption of 2 beds per 1,000 sf.

Table A-13
Functional Residents for Non-Residential Land Uses

| Land Use | Impact Unit | ITE LUC ⁽¹⁾ | Trips Per Unit ⁽²⁾ | Trips Per Employee ⁽³⁾ | Employees Per Unit ⁽⁴⁾ | One-Way Factor @ 50% ⁽⁵⁾ | Worker Hours ⁽⁶⁾ | Occupants Per Trip ⁽⁷⁾ | Visitors ⁽⁸⁾ | Visitor Hours Per Trip ⁽⁹⁾ | Days Per Week ⁽¹⁰⁾ | Functional Resident Coefficient ⁽¹¹⁾ |
|--|-------------|------------------------|-------------------------------|-----------------------------------|-----------------------------------|-------------------------------------|-----------------------------|-----------------------------------|-------------------------|---------------------------------------|-------------------------------|---|
| Recreational | | | | | | | | | | | | |
| RV Park | site | 416 | 1.62 | n/a | 1.20 | 0.81 | 9 | 2.39 | 0.74 | 1.50 | 7 | 0.50 |
| Marina | boat berth | 420 | 2.96 | 20.52 | 0.14 | 1.48 | 9 | 2.39 | 3.40 | 1.00 | 7 | 0.19 |
| Golf Course | hole | 430 | 35.74 | 20.52 | 1.74 | 17.87 | 9 | 2.39 | 40.97 | 0.25 | 7 | 1.08 |
| Movie Theater w/Matinee | 1,000 sf | 444 | 106.63 | 53.12 | 2.01 | 53.32 | 9 | 2.39 | 125.42 | 1.00 | 7 | 5.98 |
| Health/Fitness Club | 1,000 sf | 492 | 32.93 | n/a | 2.00 | 16.47 | 9 | 2.39 | 37.36 | 1.50 | 7 | 3.09 |
| Institutional | | | | | | | | | | | | |
| Elementary School (private) | student | 520 | 1.29 | 15.71 | 0.08 | 0.65 | 9 | 1.11 | 0.64 | 2.00 | 5 | 0.06 |
| Middle School (private) | student | 522 | 1.62 | 17.73 | 0.09 | 0.81 | 9 | 1.11 | 0.81 | 2.00 | 5 | 0.07 |
| High School (private) | student | 530 | 1.71 | 19.74 | 0.09 | 0.86 | 9 | 1.11 | 0.86 | 2.00 | 5 | 0.08 |
| University/Jr College; <7,500 students (private) | student | 540/550 | 2.00 | 12.26 | 0.16 | 1.00 | 9 | 1.11 | 0.95 | 2.00 | 5 | 0.10 |
| University/Jr College; >7,500 students (private) | student | 540/550 | 1.50 | 12.26 | 0.12 | 0.75 | 9 | 1.11 | 0.71 | 2.00 | 5 | 0.07 |
| Church | 1,000 sf | 560 | 9.11 | 20.64 | 0.44 | 4.56 | 9 | 1.90 | 8.22 | 1.00 | 7 | 0.51 |
| Day Care Center | 1,000 sf | 565 | 71.88 | 26.73 | 2.69 | 35.94 | 9 | 1.11 | 37.20 | 0.15 | 5 | 0.89 |
| Hospital | 1,000 sf | 610 | 13.22 | 4.50 | 2.94 | 6.61 | 9 | 1.42 | 6.45 | 1.00 | 7 | 1.37 |
| Office | | | | | | | | | | | | |
| General Office 100,000 sf or less | 1,000 sf | 710 | 13.13 | 3.32 | 3.95 | 6.57 | 9 | 1.28 | 4.46 | 1.00 | 5 | 1.19 |
| General Office 100,001-200,000 sf | 1,000 sf | 710 | 11.12 | 3.32 | 3.35 | 5.56 | 9 | 1.28 | 3.77 | 1.00 | 5 | 1.01 |
| General Office 200,001-400,000 sf | 1,000 sf | 710 | 9.41 | 3.32 | 2.83 | 4.71 | 9 | 1.28 | 3.20 | 1.00 | 5 | 0.85 |
| General Office greater than 400,000 sf | 1,000 sf | 710 | 8.54 | 3.32 | 2.57 | 4.27 | 9 | 1.28 | 2.90 | 1.00 | 5 | 0.77 |
| Medical Office/Clinic 10,000 sf or less | 1,000 sf | 720 | 23.83 | 8.91 | 2.67 | 11.92 | 9 | 1.42 | 14.26 | 1.00 | 5 | 1.14 |
| Medical Office/Clinic greater than 10,000 sf | 1,000 sf | 720 | 36.35 | 8.91 | 4.08 | 18.18 | 9 | 1.42 | 21.74 | 1.00 | 5 | 1.74 |
| Retail | | | | | | | | | | | | |
| Retail 100,000 sfgla or less | 1,000 sfgla | 820 | 67.91 | n/a | 2.50 | 33.96 | 9 | 1.73 | 56.25 | 0.50 | 7 | 2.11 |
| Retail 100,001-200,000 sfgla | 1,000 sfgla | 820 | 53.28 | n/a | 2.50 | 26.64 | 9 | 1.73 | 43.59 | 0.65 | 7 | 2.12 |
| Retail 200,001-400,000 sfgla | 1,000 sfgla | 820 | 41.80 | n/a | 2.50 | 20.90 | 9 | 1.73 | 33.66 | 1.00 | 7 | 2.34 |
| Retail greater than 400,000 sfgla | 1,000 sfgla | 820 | 36.27 | n/a | 2.50 | 18.14 | 9 | 1.73 | 28.88 | 1.25 | 7 | 2.44 |
| New/Used Auto Sales | 1,000 sf | 841 | 28.25 | 21.14 | 1.34 | 14.13 | 9 | 1.73 | 23.10 | 1.00 | 7 | 1.47 |
| Tire Superstore | service bay | 849 | 30.55 | 43.02 | 0.71 | 15.28 | 9 | 1.73 | 25.72 | 1.00 | 7 | 1.34 |
| Supermarket | 1,000 sf | 850 | 103.38 | 87.82 | 1.18 | 51.69 | 9 | 1.52 | 77.39 | 0.50 | 7 | 2.05 |
| Convenience Market (24 hour) | 1,000 sf | 851 | 719.18 | n/a | 2.50 | 359.59 | 9 | 1.52 | 544.08 | 0.20 | 7 | 5.47 |
| Convenience Market w/Gas Pumps | 1,000 sf | 853 | 775.14 | n/a | 2.50 | 387.57 | 9 | 1.52 | 586.61 | 0.20 | 7 | 5.83 |
| Home Improvement Superstore | 1,000 sf | 862 | 30.74 | n/a | 2.50 | 15.37 | 9 | 1.52 | 20.86 | 1.00 | 7 | 1.81 |
| Pharmacy/Drug Store with of w/o Drive-Thru | 1,000 sf | 880/881 | 95.96 | n/a | 2.50 | 47.98 | 9 | 1.52 | 70.43 | 0.35 | 7 | 1.96 |
| Furniture Store | 1,000 sf | 890 | 5.06 | 12.19 | 0.42 | 2.53 | 9 | 1.52 | 3.43 | 0.50 | 7 | 0.23 |

Table A-13 (continued)
Functional Residents for Non-Residential Land Uses

| Land Use | Impact Unit | ITE LUC ⁽¹⁾ | Trips Per Unit ⁽²⁾ | Trips Per Employee ⁽³⁾ | Employees Per Unit ⁽⁴⁾ | One-Way Factor @ 50% ⁽⁵⁾ | Worker Hours ⁽⁶⁾ | Occupants Per Trip ⁽⁷⁾ | Visitors ⁽⁸⁾ | Visitor Hours Per Trip ⁽⁹⁾ | Days Per Week ⁽¹⁰⁾ | Functional Resident Coefficient ⁽¹¹⁾ |
|---|-------------|------------------------|-------------------------------|-----------------------------------|-----------------------------------|-------------------------------------|-----------------------------|-----------------------------------|-------------------------|---------------------------------------|-------------------------------|---|
| Retail | | | | | | | | | | | | |
| Bank/Savings Walk-In | 1,000 sf | 911 | 121.30 | 34.69 | 3.50 | 60.65 | 9 | 1.52 | 88.69 | 0.35 | 6 | 2.23 |
| Bank Savings Drive-In | 1,000 sf | 912 | 159.34 | 30.94 | 5.15 | 79.67 | 9 | 1.52 | 115.95 | 0.15 | 6 | 2.28 |
| Quality Restaurant | 1,000 sf | 931 | 91.10 | n/a | 9.92 | 45.55 | 9 | 1.85 | 74.35 | 1.00 | 7 | 6.82 |
| High-Turnover Restaurant | 1,000 sf | 932 | 116.60 | n/a | 9.92 | 58.30 | 9 | 1.85 | 97.94 | 0.75 | 7 | 6.78 |
| Fast Food Restaurant w/Drive-Thru | 1,000 sf | 934 | 511.00 | n/a | 10.90 | 255.50 | 9 | 1.85 | 461.78 | 0.25 | 7 | 8.90 |
| Bread/Donut/Bagel Shop w/Drive-Thru | 1,000 sf | 940 | 189.90 | n/a | 10.90 | 94.95 | 9 | 1.85 | 164.76 | 0.25 | 7 | 5.80 |
| Gasoline/Service Station with or w/o Car Wash | fuel pos. | 944/946 | 157.33 | n/a | 2.50 | 78.67 | 9 | 1.52 | 117.08 | 0.20 | 7 | 1.91 |
| Self-Service Car Wash | service bay | 947 | 43.94 | n/a | 0.50 | 21.97 | 9 | 1.52 | 32.89 | 0.50 | 7 | 0.87 |
| Convenience/Gasoline/Fast Food | 1,000 sf | n/a | 984.59 | n/a | 2.50 | 492.30 | 9 | 1.52 | 745.80 | 0.20 | 7 | 7.15 |
| Industrial | | | | | | | | | | | | |
| General Light Industrial | 1,000 sf | 110 | 6.97 | 3.02 | 2.31 | 3.49 | 9 | 1.38 | 2.51 | 1.00 | 5 | 0.69 |
| General Heavy Industrial | 1,000 sf | 120 | 1.50 | 0.82 | 1.83 | 0.75 | 9 | 1.38 | 0.00 | 1.00 | 5 | 0.49 |
| Manufacturing | 1,000 sf | 140 | 3.82 | 2.13 | 1.79 | 1.91 | 9 | 1.38 | 0.85 | 1.00 | 5 | 0.50 |
| Warehouse | 1,000 sf | 150 | 3.56 | 3.89 | 0.92 | 1.78 | 9 | 1.38 | 1.54 | 0.75 | 5 | 0.28 |
| Mini-Warehouse | 1,000 sf | 151 | 2.15 | 61.90 | 0.03 | 1.08 | 9 | 1.38 | 1.46 | 0.75 | 7 | 0.06 |
| Sources: | | | | | | | | | | | | |
| (1) Land use code found in the Institute of Transportation Engineers (ITE) Trip Generation Handbook, 9th Edition | | | | | | | | | | | | |
| (2) Land uses and trip generation rates consistent with those included in the proposed 2013 Transportation Impact Fee calculated for Charlotte County | | | | | | | | | | | | |
| (3) Trips per worker from ITE Trip Generation Handbook, 9th Edition, when available | | | | | | | | | | | | |
| (4) Trips per impact unit divided by trips per person (usually employee). When trips per person are not available, the employees per unit is estimated. | | | | | | | | | | | | |
| (5) Trips per unit (Item 2) multiplied by 50 percent | | | | | | | | | | | | |
| (6), (9), (10) Estimated | | | | | | | | | | | | |
| (7) Nationwide Personal Transportation Survey | | | | | | | | | | | | |
| (8) [(One-way Trips/Unit X Occupants/Trip) - Employees] | | | | | | | | | | | | |
| (11) [(Workers X Hours/Day X Days/Week) + (Visitors X Hours/Visit X Days/Week)]/(24 Hours x 7 Days) | | | | | | | | | | | | |

Table A-14
Total Weighted Seasonal Population Projections
(Countywide)

| Year | Permanent Population ⁽¹⁾ | Seasonal Population (Weighted) ⁽¹⁾ | Hotel/Motel ⁽¹⁾ | Total Weighted Seasonal Population ⁽²⁾ |
|------|-------------------------------------|---|----------------------------|---|
| 2000 | 141,627 | 9,772 | 2,875 | 154,274 |
| 2001 | 144,866 | 9,885 | 2,908 | 157,659 |
| 2002 | 148,304 | 10,000 | 2,941 | 161,245 |
| 2003 | 151,269 | 10,116 | 2,975 | 164,360 |
| 2004 | 154,709 | 10,233 | 3,009 | 167,951 |
| 2005 | 153,274 | 10,352 | 3,044 | 166,670 |
| 2006 | 156,491 | 10,472 | 3,079 | 170,042 |
| 2007 | 160,083 | 10,593 | 3,114 | 173,790 |
| 2008 | 160,412 | 10,716 | 3,150 | 174,278 |
| 2009 | 159,860 | 10,840 | 3,186 | 173,886 |
| 2010 | 159,978 | 10,966 | 3,224 | 174,168 |
| 2011 | 160,463 | 11,045 | 3,247 | 174,755 |
| 2012 | 163,357 | 11,125 | 3,270 | 177,752 |
| 2013 | 163,679 | 11,205 | 3,293 | 178,177 |
| 2014 | 165,823 | 11,286 | 3,316 | 180,425 |
| 2015 | 168,000 | 11,369 | 3,338 | 182,707 |
| 2016 | 169,663 | 11,433 | 3,359 | 184,455 |
| 2017 | 171,343 | 11,497 | 3,380 | 186,220 |
| 2018 | 173,039 | 11,561 | 3,401 | 188,001 |
| 2019 | 174,752 | 11,626 | 3,422 | 189,800 |
| 2020 | 176,500 | 11,692 | 3,444 | 191,636 |
| 2021 | 178,106 | 11,748 | 3,466 | 193,320 |
| 2022 | 179,727 | 11,804 | 3,489 | 195,020 |
| 2023 | 181,363 | 11,861 | 3,512 | 196,736 |
| 2024 | 183,013 | 11,918 | 3,535 | 198,466 |
| 2025 | 184,701 | 11,978 | 3,558 | 200,237 |
| 2026 | 186,252 | 12,027 | 3,579 | 201,858 |
| 2027 | 187,817 | 12,076 | 3,600 | 203,493 |
| 2028 | 189,395 | 12,126 | 3,621 | 205,142 |
| 2029 | 190,986 | 12,176 | 3,642 | 206,804 |
| 2030 | 192,601 | 12,225 | 3,665 | 208,491 |
| 2031 | 193,968 | 12,259 | 3,686 | 209,913 |
| 2032 | 195,345 | 12,293 | 3,707 | 211,345 |
| 2033 | 196,732 | 12,327 | 3,729 | 212,788 |
| 2034 | 198,129 | 12,362 | 3,751 | 214,242 |
| 2035 | 199,536 | 12,397 | 3,773 | 215,706 |
| 2036 | 200,953 | 12,432 | 3,795 | 217,180 |
| 2037 | 202,380 | 12,467 | 3,817 | 218,664 |
| 2038 | 203,817 | 12,502 | 3,839 | 220,158 |
| 2039 | 205,264 | 12,537 | 3,861 | 221,662 |
| 2040 | 206,701 | 12,568 | 3,885 | 223,154 |

(1) Source: Charlotte County Staff (Table WSW-1). Interim years were interpolated based on annualized population growth rates

(2) Sum of the permanent population, seasonal population, and the hotel/motel population

**Table A-15
Total Weighted Seasonal Population Projections
(Unincorporated)**

| Year | Permanent Population ⁽¹⁾ | Seasonal Population (Weighted) ⁽¹⁾ | Hotel/Motel ⁽¹⁾ | Total Weighted Seasonal Population ⁽²⁾ |
|------|-------------------------------------|---|----------------------------|---|
| 2000 | 127,283 | 8,782 | 2,584 | 138,649 |
| 2001 | 130,379 | 8,896 | 2,617 | 141,892 |
| 2002 | 133,474 | 9,000 | 2,647 | 145,121 |
| 2003 | 136,142 | 9,104 | 2,677 | 147,923 |
| 2004 | 139,238 | 9,210 | 2,708 | 151,156 |
| 2005 | 137,947 | 9,317 | 2,740 | 150,004 |
| 2006 | 140,842 | 9,425 | 2,771 | 153,038 |
| 2007 | 144,075 | 9,534 | 2,803 | 156,412 |
| 2008 | 144,371 | 9,644 | 2,835 | 156,850 |
| 2009 | 143,874 | 9,756 | 2,867 | 156,497 |
| 2010 | 143,337 | 9,825 | 2,889 | 156,051 |
| 2011 | 143,722 | 9,893 | 2,908 | 156,523 |
| 2012 | 146,373 | 9,968 | 2,930 | 159,271 |
| 2013 | 146,592 | 10,035 | 2,949 | 159,576 |
| 2014 | 149,241 | 10,157 | 2,984 | 162,382 |
| 2015 | 151,200 | 10,232 | 3,004 | 164,436 |
| 2016 | 152,697 | 10,290 | 3,023 | 166,010 |
| 2017 | 154,209 | 10,347 | 3,042 | 167,598 |
| 2018 | 155,735 | 10,405 | 3,061 | 169,201 |
| 2019 | 157,277 | 10,463 | 3,080 | 170,820 |
| 2020 | 158,850 | 10,523 | 3,100 | 172,473 |
| 2021 | 160,295 | 10,573 | 3,119 | 173,987 |
| 2022 | 161,754 | 10,624 | 3,140 | 175,518 |
| 2023 | 163,227 | 10,675 | 3,161 | 177,063 |
| 2024 | 164,712 | 10,726 | 3,182 | 178,620 |
| 2025 | 166,231 | 10,780 | 3,202 | 180,213 |
| 2026 | 167,627 | 10,824 | 3,221 | 181,672 |
| 2027 | 169,035 | 10,868 | 3,240 | 183,143 |
| 2028 | 170,456 | 10,913 | 3,259 | 184,628 |
| 2029 | 171,887 | 10,958 | 3,278 | 186,123 |
| 2030 | 173,341 | 11,003 | 3,299 | 187,643 |
| 2031 | 174,571 | 11,033 | 3,317 | 188,921 |
| 2032 | 175,811 | 11,064 | 3,336 | 190,211 |
| 2033 | 177,059 | 11,094 | 3,356 | 191,509 |
| 2034 | 178,316 | 11,126 | 3,376 | 192,818 |
| 2035 | 179,582 | 11,157 | 3,396 | 194,135 |
| 2036 | 180,858 | 11,189 | 3,416 | 195,463 |
| 2037 | 182,142 | 11,220 | 3,435 | 196,797 |
| 2038 | 183,435 | 11,252 | 3,455 | 198,142 |
| 2039 | 184,738 | 11,283 | 3,475 | 199,496 |
| 2040 | 186,031 | 11,311 | 3,497 | 200,839 |

- (1) Source: Charlotte County Staff (Table WSW-1). The unincorporated population is estimated to be 90 percent of the countywide population based on the unincorporated to countywide ratios from 2000, and 2010 through 2013. This ratio was assumed to remain the same through 2040. Interim years were interpolated based on annualized population growth rates
- (2) Sum of the permanent population, seasonal population, and the hotel/motel population

Table A-16
Total Weighted Seasonal Population Projections
(Unincorporated & Excluding Englewood Fire District)

| Year | Permanent Population ⁽¹⁾ | Seasonal Population (Weighted) ⁽¹⁾ | Hotel/Motel ⁽¹⁾ | Total Weighted Seasonal Population ⁽²⁾ |
|------|-------------------------------------|---|----------------------------|---|
| 2000 | 102,909 | 7,101 | 2,089 | 112,099 |
| 2001 | 105,448 | 7,195 | 2,117 | 114,760 |
| 2002 | 107,951 | 7,279 | 2,141 | 117,371 |
| 2003 | 110,109 | 7,363 | 2,166 | 119,638 |
| 2004 | 112,613 | 7,449 | 2,190 | 122,252 |
| 2005 | 111,569 | 7,535 | 2,216 | 121,320 |
| 2006 | 113,910 | 7,623 | 2,241 | 123,774 |
| 2007 | 116,525 | 7,711 | 2,267 | 126,503 |
| 2008 | 116,764 | 7,800 | 2,293 | 126,857 |
| 2009 | 116,362 | 7,890 | 2,319 | 126,571 |
| 2010 | 115,805 | 7,938 | 2,334 | 126,077 |
| 2011 | 116,106 | 7,992 | 2,349 | 126,447 |
| 2012 | 118,259 | 8,054 | 2,367 | 128,680 |
| 2013 | 118,423 | 8,107 | 2,383 | 128,913 |
| 2014 | 120,703 | 8,215 | 2,414 | 131,332 |
| 2015 | 122,287 | 8,275 | 2,430 | 132,992 |
| 2016 | 123,498 | 8,322 | 2,445 | 134,265 |
| 2017 | 124,721 | 8,369 | 2,460 | 135,550 |
| 2018 | 125,955 | 8,415 | 2,476 | 136,846 |
| 2019 | 127,202 | 8,463 | 2,491 | 138,156 |
| 2020 | 128,474 | 8,511 | 2,507 | 139,492 |
| 2021 | 129,643 | 8,551 | 2,523 | 140,717 |
| 2022 | 130,823 | 8,592 | 2,540 | 141,955 |
| 2023 | 132,014 | 8,634 | 2,556 | 143,204 |
| 2024 | 133,215 | 8,675 | 2,573 | 144,463 |
| 2025 | 134,444 | 8,719 | 2,590 | 145,753 |
| 2026 | 135,573 | 8,754 | 2,605 | 146,932 |
| 2027 | 136,712 | 8,790 | 2,620 | 148,122 |
| 2028 | 137,861 | 8,827 | 2,636 | 149,324 |
| 2029 | 139,018 | 8,863 | 2,651 | 150,532 |
| 2030 | 140,194 | 8,899 | 2,668 | 151,761 |
| 2031 | 141,189 | 8,923 | 2,683 | 152,795 |
| 2032 | 142,192 | 8,948 | 2,698 | 153,838 |
| 2033 | 143,201 | 8,973 | 2,714 | 154,888 |
| 2034 | 144,218 | 8,998 | 2,730 | 155,946 |
| 2035 | 145,242 | 9,024 | 2,746 | 157,012 |
| 2036 | 146,274 | 9,049 | 2,762 | 158,085 |
| 2037 | 147,312 | 9,075 | 2,778 | 159,165 |
| 2038 | 148,358 | 9,100 | 2,794 | 160,252 |
| 2039 | 149,412 | 9,126 | 2,810 | 161,348 |
| 2040 | 150,458 | 9,148 | 2,828 | 162,434 |

(1) Source: Charlotte County Staff (Table WSW-1). The unincorporated population excluding the Englewood Fire District is estimated to be approximately 73 percent of the countywide population based on the unincorporated to countywide ratios from 2000, and 2010 through 2013 and the Englewood Fire District population to the countywide population from 2010. These ratios were assumed to remain the same through 2040. Interim years were interpolated based on annualized population growth rates

(2) Sum of the permanent population, seasonal population, and the hotel/motel population

Appendix B
Cost Component – Supplemental Information

This Appendix provides a summary of building and land value estimates for the impact fee program areas presented in this update.

Building Values

For each of the program areas, the following information was reviewed to estimate building values:

- Recent construction completed by Charlotte County (if any);
- Estimates for any planned facilities;
- Insurance values of existing facilities;
- Data from other jurisdictions for recently completed facilities; and
- Discussions with architects/contractors as well as the County representatives.

The following paragraphs provide a summary for each program area.

Public Buildings, Law Enforcement and Correctional Facilities

Public buildings and law enforcement facilities tend to include a wide range of buildings, such as offices, courthouses, maintenance buildings, parking garages, etc. as well as prime versus support buildings. Correctional facilities/jails and Emergency Operations Centers (EOC) tend to be more expensive to construct than typical public buildings or law enforcement facilities primarily due to the security features and regulations. Given this, a separate construction cost estimate for correctional facilities was prepared. Because the County is unlikely to build another EOC facility, the average public buildings value was used for this building also.

Charlotte County has not built a new jail over the past few years. As presented in Table B-1, insurance values of the existing jail buildings ranged from \$245 to \$265 per square foot. The low end of this range represents building value only and the high end represents building and content value per square foot. It is important to note insurance values are considered to provide estimates below the full cost since they typically do not take into consideration certain building components, such as foundation, architectural/design cost, furniture/fixture/equipment, security features, etc.

Recent jail construction in other Florida counties and estimates obtained from construction companies and architects suggested a range of \$225 to \$445 per square foot. Given this

information, a unit cost of \$250 per square foot for jail buildings is used in the study, which represents a relatively conservative estimate.

The most recent public buildings/law enforcement facilities constructed in Charlotte County were completed in 2011, at a cost of \$230 per square foot. The County has plans to add several facilities over the next five years, and the construction cost associated with these facilities is estimated at \$265 per square foot while the total cost is estimated at \$300 to \$325 per square foot. As presented in Table B-1, the insurance value of existing prime buildings (excluding jail and EOC) averaged \$175 per square foot to \$200 per square foot and the value of support buildings averaged \$55 per square foot to \$100 per square foot. The low end of these ranges represents insured building value only and the high end represents insured building and content value. Finally, the building value of prime and support facilities in other Florida jurisdictions for which information was available, range from \$135 to \$200 per square foot.

Given this information, the building value of prime facilities is estimated at \$200 per square foot and support buildings at \$75 per square foot for both public buildings and law enforcement facilities. This results in a weighted average value of \$200 per square foot for all buildings, including correctional facilities, which is within the range of other jurisdiction.

Table B-1
Value of Public Facilities, Law Enforcement and Correctional Facilities

| Source | Year | Building Cost per Square Foot |
|--|-------------|-------------------------------|
| Jail: | | |
| Insurance Values of Existing Jail Buildings ⁽¹⁾ | 2014 | \$245 - \$260 |
| Recent Jail Construction in Other Florida Counties ⁽²⁾ | 2009, 2013 | \$225 |
| Estimates from National Construction Companies ⁽³⁾ | 2013 | \$270-\$300 |
| Estimates from Florida Architects ⁽⁴⁾ | 2013 | \$285-\$445 |
| Used in the Study | 2014 | \$250 |
| Public Buildings & Law Enforcement (Excluding Jail): | | |
| Human Services Building ⁽⁵⁾ | 2011 | \$230 |
| Future Planned Facilities ⁽⁶⁾ | N/A | \$265 - \$325 |
| Insurance Values of Existing Buildings (prime) ⁽⁷⁾ | 2014 | \$175 - \$200 |
| Insurance Values of Existing Buildings (support) ⁽⁸⁾ | 2014 | \$55 - \$100 |
| Recent Public Building Construction in Other Florida Counties ⁽⁹⁾ | 2010-2012 | \$135 - \$200 |
| Used in the Study -- Prime Buildings | 2014 | \$200 |
| Used in the Study -- Support Buildings | 2014 | \$75 |

(1) Source: Charlotte County

(2) Source: AJAX Engineering and Florida Department of Correctional Facilities, figures rounded to nearest \$10

(3) Source: Reed Construction

(4) Based on discussions with industry architects for a range of a typical jail in Florida based on their experience

(5) Source: Charlotte County

(6) Source: Charlotte County

(7) Source: Charlotte County

(8) Source: Charlotte County

(9) Source: Florida jurisdictions

Libraries

The most recent library construction in Charlotte County was completed in 2013 with the expansion and renovation of the Englewood Library, for a cost of \$329 per square foot. The current average insurance value of existing libraries is \$190 per square foot for buildings only and \$295 per square foot for buildings and contents. Insurance values tend to represent a conservative estimate. Finally, recent library construction in other Florida jurisdictions provided an average building cost of \$245 per square foot. Given this information, a building value of \$240 per square foot is used in the library impact fee calculations. This figure takes into consideration that insurance values of the contents includes library materials, which are accounted separately in impact fee calculations and therefore should not be included in the building value.

**Table B-2
Library Building Value**

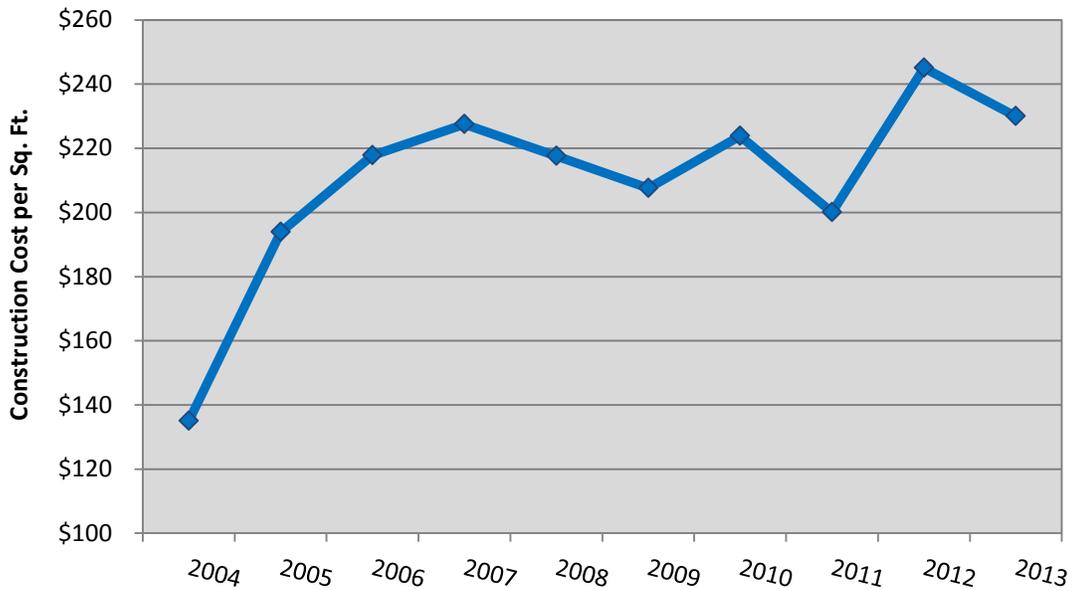
| Source | Year | Building Cost per Square Foot |
|--|-------------|-------------------------------|
| Englewood Library Expansion ⁽¹⁾ | 2013 | \$329 |
| Insurance Values of Existing Libraries ⁽²⁾ | 2013 | \$190 - \$295 |
| Recent Library Construction in Other Florida Counties ⁽³⁾ | 2010-2012 | \$245 |
| Used in the Study | 2014 | \$240 |

- (1) Source: Charlotte County
- (2) Source: Charlotte County
- (3) Source: Recent impact fee studies

Fire/EMS Facilities

As part of this analysis, TOA contacted several Florida jurisdictions to obtain more recent cost information. The bids and estimates received since 2010 for facilities built in 2010 or 2012 range from \$190 to \$300 per square foot (excluding furniture/fixture/equipment, site preparation cost, permits, fees and other similar expenses). The following chart presents the building construction cost trends based on bids, estimates, and other information obtained during the previous impact fee studies completed by TOA. As presented, the variation in station costs is relatively minor over the past few years.

**Figure B-1
Fire/EMS Station Construction Cost per Square Foot**



Source: Fire station construction cost data collected from Florida jurisdictions

In determining the appropriate unit cost for station construction in Charlotte County, in addition to these trends, the following data was evaluated:

- The County has not built any fire stations over the past three to four years and there are no new fire stations in the current CIP.
- The insurance value of existing fire stations is \$190 per square foot for building value only and \$200 per square foot for building and content value. As discussed previously, insurance values are considered to represent a conservative estimate.

Based on the information summarized in Table B-3, a unit cost of \$230 per square foot is used for fire/EMS station building value. This figure is based primarily on recent construction cost data from other Florida jurisdictions and is also consistent with Charlotte County’s insurance values.

**Table B-3
Fire/EMS Station Building Value**

| Source | Year | Building Cost per Square Foot |
|---|-------------|-------------------------------|
| Insurance Values of Existing Fire/EMS Stations ⁽¹⁾ | 2014 | \$190 - \$200 |
| Recent Fire Station Construction in Other Florida Counties ⁽²⁾ | 2010-2013 | \$190 - \$300 |
| Estimates from Florida Architects ⁽³⁾ | 2013 | \$230 - \$280 |
| Used in the Study | 2014 | \$230 |

(1) Source: Charlotte County, figures rounded to nearest \$10

(2) Source: Individual jurisdictions

(3) Based on discussions with industry architects for a range of a typical fire station in Florida based on their experience (includes adjustment for ff&e, site preparation, permits, etc.)

In addition to fire stations, the fire/EMS building inventory includes the Vehicles Maintenance Building, which has an insurance value of \$140 per square foot for building only and \$165 per square foot for building and content value. A unit value of \$165 per square foot is used for this building in the impact fee calculations.

Parks & Recreation Facilities

The parks and recreation facilities impact fee inventory includes several recreational facilities. The value of these facilities is based on insurance values, information from other jurisdictions and discussions with the County staff.

Land Values

For each impact fee program area, land values were determined based on the following analysis, as data available:

- Recent land purchases for the related infrastructure (if any);
- Value of current parcels as reported by the Charlotte County Property Appraiser;
- Value of vacant land by size and by land use; and
- Vacant land sales over the past four years by size and by land use.

As shown in Tables B-4 and B-5, the land value and sales analysis suggested that sales data indicate higher values than estimates included in the Property Appraiser's database for those vacant properties that have not been sold for a while. This may be due to a lag in the update of land values. The following paragraphs summarize the data used for each program area.

Table B-4 includes parcels located within Charlotte County and Punta Gorda, while Table B-5 only includes parcels in the unincorporated county.

**Table B-4
Vacant Land Sales and Value Analysis (per Acre); Countywide**

| Acreage | Vacant Land Sales 2010-2013 (per acre) | | | Vacant Land Values (per acre) | | |
|----------------------------------|--|-----------|------------------|-------------------------------|----------|-----------------|
| | Count | Median | Average | Count | Median | Average |
| <i>Vacant Residential</i> | | | | | | |
| 0.5 to 4 | 465 | \$44,611 | \$168,957 | 2,340 | \$18,656 | \$57,389 |
| 4 to 6 | 14 | \$15,157 | \$32,960 | 91 | \$14,710 | \$28,305 |
| 6 to 15 | 18 | \$29,733 | \$102,360 | 56 | \$17,962 | \$33,742 |
| 15 to 25 | 5 | \$289,097 | \$310,736 | 20 | \$16,686 | \$23,380 |
| 20 to 60 | 4 | \$410,055 | \$320,487 | 16 | \$20,132 | \$24,364 |
| 60 to 100 | 1 | \$10,158 | \$10,158 | 2 | \$20,000 | \$19,053 |
| 40 to 130 | 1 | \$10,158 | \$10,158 | 3 | \$18,000 | \$18,818 |
| 100+ | 0 | N/A | N/A | 0 | N/A | N/A |
| <i>Vacant Commercial</i> | | | | | | |
| 0.5 to 4 | 50 | \$114,547 | \$237,767 | 803 | \$58,806 | \$91,996 |
| 4 to 6 | 7 | \$72,632 | \$101,065 | 77 | \$28,314 | \$57,644 |
| 6 to 15 | 9 | \$58,104 | \$115,368 | 56 | \$41,110 | \$51,183 |
| 15 to 25 | 2 | \$19,657 | \$19,648 | 16 | \$37,998 | \$56,096 |
| 20 to 60 | 1 | \$71,429 | \$71,429 | 13 | \$29,303 | \$30,474 |
| 60 to 100 | 2 | \$32,894 | \$31,998 | 4 | \$36,677 | \$37,882 |
| 40 to 130 | 2 | \$32,894 | \$31,998 | 8 | \$32,052 | \$33,016 |
| 100+ | 0 | \$0 | N/A | 1 | \$32,132 | \$32,132 |
| <i>Vacant Industrial</i> | | | | | | |
| 0.5 to 4 | 6 | \$117,404 | \$145,166 | 132 | \$56,629 | \$77,398 |
| 4 to 6 | 4 | \$172,851 | \$169,802 | 24 | \$50,094 | \$51,238 |
| 6 to 15 | 0 | N/A | N/A | 7 | \$54,450 | \$48,322 |
| 15 to 25 | 0 | N/A | N/A | 0 | N/A | N/A |
| 20 to 60 | 0 | N/A | N/A | 2 | \$94,319 | \$86,138 |
| 60 to 100 | 0 | N/A | N/A | 0 | N/A | N/A |
| 40 to 130 | 0 | N/A | N/A | 0 | N/A | N/A |
| 100+ | 0 | N/A | N/A | 1 | \$10,338 | \$10,338 |

Source: Charlotte County Property Appraiser Database

**Table B-5
Vacant Land Sales and Value Analysis (per Acre); Unincorporated County**

| Acreage | Vacant Land Sales (per acre) | | | Vacant Land Values (per acre) | | |
|----------------------------------|------------------------------|-----------|------------------|-------------------------------|----------|-----------------|
| | Count | Median | Average | Count | Median | Average |
| <i>Vacant Residential</i> | | | | | | |
| 0.5 to 4 | 411 | \$36,303 | \$93,869 | 2,202 | \$18,064 | \$56,366 |
| 4 to 6 | 13 | \$15,074 | \$31,931 | 88 | \$13,792 | \$24,335 |
| 6 to 15 | 16 | \$26,566 | \$103,634 | 50 | \$16,943 | \$29,855 |
| 15 to 25 | 5 | \$289,097 | \$310,736 | 20 | \$16,686 | \$23,380 |
| 20 to 60 | 4 | \$410,055 | \$320,487 | 15 | \$20,000 | \$24,098 |
| 60 to 100 | 1 | \$10,158 | \$10,158 | 2 | \$20,000 | \$19,053 |
| 40 to 130 | 1 | \$10,158 | \$10,158 | 3 | \$18,000 | \$18,818 |
| 100+ | 0 | N/A | N/A | 0 | N/A | N/A |
| <i>Vacant Commercial</i> | | | | | | |
| 0.5 to 4 | 48 | \$109,253 | \$234,409 | 749 | \$56,628 | \$85,306 |
| 4 to 6 | 7 | \$72,632 | \$101,065 | 69 | \$26,136 | \$48,025 |
| 6 to 15 | 9 | \$58,104 | \$115,368 | 54 | \$41,110 | \$50,834 |
| 15 to 25 | 2 | \$19,657 | \$19,648 | 16 | \$37,998 | \$56,096 |
| 20 to 60 | 1 | \$71,429 | \$71,429 | 13 | \$29,303 | \$30,474 |
| 60 to 100 | 2 | \$32,894 | \$31,998 | 4 | \$36,677 | \$37,882 |
| 40 to 130 | 2 | \$32,894 | \$31,998 | 8 | \$32,052 | \$33,016 |
| 100+ | 0 | N/A | N/A | 1 | \$32,132 | \$32,132 |
| <i>Vacant Industrial</i> | | | | | | |
| 0.5 to 4 | 6 | \$117,404 | \$145,166 | 127 | \$65,341 | \$73,468 |
| 4 to 6 | 4 | \$172,851 | \$169,802 | 24 | \$50,094 | \$51,238 |
| 6 to 15 | 0 | N/A | N/A | 7 | \$54,450 | \$48,322 |
| 15 to 25 | 0 | N/A | N/A | 0 | N/A | N/A |
| 20 to 60 | 0 | N/A | N/A | 2 | \$94,319 | \$86,138 |
| 60 to 100 | 0 | N/A | N/A | 0 | N/A | N/A |
| 40 to 130 | 0 | N/A | N/A | 0 | N/A | N/A |
| 100+ | 0 | N/A | N/A | 1 | \$10,338 | \$10,338 |

Source: Charlotte County Property Appraiser Database

Public Buildings, Law Enforcement and Correctional Facilities

Public buildings and law enforcement facilities include a range of facilities from County offices, courthouses, and other similar facilities that need to be in central locations to maintenance facilities that have more flexibility in location. The County's last land purchase for public buildings was completed in 2006 for approximately \$250,000 per acre. Given that there are no recent purchases and no programmed land purchases at this time, the land value of parcels where the existing buildings are located is evaluated. This analysis resulted

in a range of \$13,000 per acre to \$340,000 per acre, depending on location. Based on discussions with County representatives, \$100,000 per acre is used in the impact fee calculations.

Libraries

Similar to public buildings, the County has not bought any land for libraries in recent years and there are no plans to do so over the next few years. The current value of land where existing libraries are located averages \$90,000 per acre, with a range of \$55,000 per acre to \$183,000 per acre. This information along with discussions with County representatives suggests that an average land value of \$100,000 per acre is a reasonable estimate.

Fire/EMS

Typically, fire/EMS stations need to be located at or near major intersections and not in residential areas, for better access and minimum disturbance. As such, land value of these facilities tends to be higher. However, in more rural areas, land values for fire stations are likely to be more reasonable. This type of variation can be seen in the current land value of existing fire stations, which average \$43,000 per acre with a range of \$10,000 per acre to \$345,000 per acre. Based on this information and discussions with County representatives, land value for fire/EMS stations is estimated at \$60,000 per acre for impact fee calculations.

Parks

Charlotte County's parks inventory includes community, regional and specialty parks. In the case of community parks, the park parcels range from 8 to 55 acres. The value shown for these parcels in the Property Appraiser's database ranges from \$1,300 per acre to \$55,000 per acre, with an average of \$15,000 per acre. In the case of regional and specialty parks, parcel size ranges from 0.3 acres to 103 acres. The value of these parcels averages \$50,000 per acre with a range of \$2,400 per acre to \$865,000 per acre. Given this information and discussion with the County representatives, an average value of \$15,000 per acre is used for community parks and \$50,000 per acre is used for regional and specialty parks.

Appendix C
Law Enforcement/Correctional/Public Buildings Inventory

This Appendix provides the detailed inventory of public buildings.

**Table C-1
Summary of Law Enforcement/Correctional/Public Buildings Facilities Inventory**

| Facility | Building Square Feet⁽¹⁾ | Program Area |
|--|---|---------------------|
| Primary Buildings | | |
| Charlotte County Jail | 295,312 | Law Enf. |
| Historic Courthouse | 17,000 | Public Bldgs. |
| Public Safety - EOC | 28,970 | Public Bldgs. |
| Administration Center A | 94,194 | Public Bldgs. |
| Administration Center B | 35,200 | Public Bldgs. |
| Facilities Management | 4,345 | Public Bldgs. |
| Octagon Bldg | 1,525 | Public Bldgs. |
| Building Construction Services Building | 17,578 | Public Bldgs. |
| Cultural - Conference Center | 45,665 | Public Bldgs. |
| Cultural - Theater | 11,754 | Public Bldgs. |
| Cultural - Senior Lounge | 37,992 | Public Bldgs. |
| Cultural - Learning Center | 22,176 | Public Bldgs. |
| Family Service Center | 28,763 | Public Bldgs. |
| South Punta Gorda Heights Civic Ctr | 4,024 | Public Bldgs. |
| Justice Center Building | 207,238 | Public Bldgs. |
| PW - New Operations Bldg | 7,342 | Public Bldgs. |
| Human Service Bldg | 2,200 | Public Bldgs. |
| Health Department | 12,440 | Public Bldgs. |
| New Health Department | 47,500 | Public Bldgs. |
| Human Services/Health Clinic | 12,500 | Public Bldgs. |
| CARE | 5,074 | Public Bldgs. |
| Sheriff's Administration | 61,956 | Law Enf. |
| Englewood Annex - Admin. Bldg | 10,363 | Public Bldgs. |
| Englewood Annex - Admin. Bldg Sheriff | 2,600 | Law Enf. |
| San Casa Yard - Mosquito Control | 2,100 | Public Bldgs. |
| Harbour Heights | 4,807 | Public Bldgs. |
| Medical Examiner | 7,581 | Public Bldgs. |
| Work Release Bldg | 12,954 | Law Enf. |
| Video Visitation | 3,505 | Law Enf. |
| Training Armory | 3,482 | Law Enf. |
| Maintenance Bldg | 2,159 | Law Enf. |
| Tom Adams Bridge - Bridge Tender Bldg | 180 | Public Bldgs. |
| Subtotal - Primary Buildings | 1,050,479 | - |
| Subtotal - Primary Buildings (Public Buildings) | 668,511 | - |
| Subtotal - Primary Buildings (Law Enforcement) | 381,968 | - |

Table C-1 (continued)
Summary of Law Enforcement/Correctional/Public Buildings Facilities Inventory

| Facility | Building Square Feet ⁽¹⁾ | Program Area |
|--|--|-----------------|
| Support Buildings | | |
| Chiller Bldg | 3,536 | Public Bldgs. |
| Code Compliance Portable Bldg | 1,488 | Public Bldgs. |
| Cultural - Gazebo | 615 | Public Bldgs. |
| JB Yard | 4,920 | Public Bldgs. |
| PW - Engineering Bldg | 3,750 | Public Bldgs. |
| PW - Sign Shop Bldg | 1,800 | Public Bldgs. |
| PW - Sign Shop Storage Bldg | 192 | Public Bldgs. |
| PW - Traffic Engineering Portable Bldg | 672 | Public Bldgs. |
| PW - Lighting District Admin. Bldg | 1,800 | Public Bldgs. |
| PW - Lighting District Tech Bldg | 1,800 | Public Bldgs. |
| PW - Lighting District Metal Storage Shed | 1,080 | Public Bldgs. |
| PW - Fuel Storage Control Bldg | 1,875 | Public Bldgs. |
| PW - Toy Shop Metal Bldg | 3,200 | Public Bldgs. |
| PW - IT Network Bldg | 64 | Public Bldgs. |
| Fuel Station Canopy | 3,100 | Public Bldgs. |
| Airport Road Annex - Supv of Elections Warehouse | 3,895 | Public Bldgs. |
| Airport Road Annex - Supv of Elections Office/Storage Bldg | 900 | Public Bldgs. |
| Airport Road Annex - Main Building/Warehouse | 14,760 | Law Enf. |
| Airport Road Annex - Sheriff's Storage Bldg | 760 | Law Enf. |
| Airport Road Annex - Old Radio Tower Bldg | 216 | Public Bldgs. |
| Airport Road Annex - New Radio Tower Bldg | 216 | Public Bldgs. |
| Airport Road Annex - Transit Bldg | 3,195 | Public Bldgs. |
| Airport Road Annex - Gun Range | 2,940 | Law Enf. |
| Airport Road Annex - Radio Tower | 216 | Public Bldgs. |
| Storage | 196 | Public Bldgs. |
| San Casa Yard - Public Works | 2,736 | Public Bldgs. |
| South County Annex | 34,630 | Public Bldgs. |
| Subtotal - Support Buildings | 94,552 | - |
| Subtotal - Support Buildings (Public Buildings) | 76,092 | - |
| Subtotal - Support Buildings (Law Enforcement) | 18,460 | - |
| All Public Buildings | 1,145,031 | - |

(1) Source: Charlotte County

Note: Buildings indicated as "Law Enforcement" include both law enforcement buildings and correctional facilities.

**Table C-2
Summary of Law Enforcement/Correctional/Public Buildings Land and Facilities**

| Facility | Address ⁽¹⁾ | Year Built ⁽¹⁾ | Total Acreage ⁽¹⁾ | Building Square Feet ⁽¹⁾ | Total Square Footage ⁽²⁾ | Allocated Acreage ⁽³⁾ | Program Area |
|---|------------------------|---------------------------|------------------------------|-------------------------------------|-------------------------------------|----------------------------------|---------------|
| Administration Center A | 18500 Murdock Circle | 1989 | 22.01 | 94,194 | 157,866 | 13.13 | Public Bldgs. |
| Administration Center B | | 1981 | | 35,200 | | 4.91 | Public Bldgs. |
| Chiller Building | | 1981 | | 3,536 | | 0.49 | Public Bldgs. |
| Facilities Management | | 1983 | | 4,345 | | 0.61 | Public Bldgs. |
| Code Compliance Portable Building | | 1994 | | 1,488 | | 0.21 | Public Bldgs. |
| Octagon Building | | 1989 | | 1,525 | | 0.21 | Public Bldgs. |
| Building Construction Services Building | | 1989 | | 17,578 | | 2.45 | Public Bldgs. |
| Cultural - Conference Center | | 2280 Aaron Street | | 2002 | | 8.02 | 45,665 |
| Cultural - Theater | 1971 | | 11,754 | 0.72 | Public Bldgs. | | |
| Cultural - Senior Lounge | 1971 | | 37,992 | 2.33 | Public Bldgs. | | |
| Cultural - Learning Center | 1967 | | 22,176 | 1.36 | Public Bldgs. | | |
| Cultural - Gazebo | 1971 | | 615 | 0.04 | Public Bldgs. | | |
| Family Service Center | 21450 Gibraltar Dr | 1980 | 3.17 | 28,763 | 28,763 | 3.17 | Public Bldgs. |
| JB Yard | 19815 Kenilworth Blvd | 1987 | 8.08 | 4,920 | 4,920 | 8.08 | Public Bldgs. |
| South Punta Gorda Heights Civic Ctr | 11200 First St | 1995 | 1.93 | 4,024 | 4,024 | 1.93 | Public Bldgs. |
| Justice Center Building | 350 E Marion St | 1998 | 10.02 | 207,238 | 207,238 | 10.02 | Public Bldgs. |
| PW - Engineering Building | 7001 Florida St | 1981 | 30.53 | 3,750 | 49,215 | 2.33 | Public Bldgs. |
| PW - Sign Shop Building | | 1981 | | 1,800 | | 1.12 | Public Bldgs. |
| PW - Sign Shop Storage Building | | 2005 | | 192 | | 0.12 | Public Bldgs. |
| PW - Traffic Engineering Portable Building | | 2004 | | 672 | | 0.42 | Public Bldgs. |
| PW - Lighting District Administrative Building | | 1990 | | 1,800 | | 1.12 | Public Bldgs. |
| PW - Lighting District Technology Building | | 1990 | | 1,800 | | 1.12 | Public Bldgs. |
| PW - Lighting District Metal Storage Shed | | 1992 | | 1,080 | | 0.67 | Public Bldgs. |
| PW - Fuel Storage Control Building | | 2005 | | 1,875 | | 1.16 | Public Bldgs. |
| PW - Toy Shop Metal Building | | 1981 | | 3,200 | | 1.99 | Public Bldgs. |
| PW - IT Network Building | | 2005 | | 64 | | 0.04 | Public Bldgs. |
| PW - New Operations Building | | 2007 | | 7,342 | | 4.55 | Public Bldgs. |
| Fuel Station Canopy | | 6905 Florida Street | | 1991 | | | 3,100 |
| Historic Courthouse | 226 Taylor St | 1928 | 0.50 | 17,000 | 17,000 | 0.50 | Public Bldgs. |
| Human Service Building | 512 E. Grace St | 1969 | 2.87 | 2,200 | 14,640 | 0.43 | Public Bldgs. |
| Health Department | 514 E. Grace St | 1969 | | 12,440 | | 2.44 | Public Bldgs. |
| New Health Department | 1100 Loveland Blvd | 2010 | 10.30 | 47,500 | 60,000 | 8.15 | Public Bldgs. |
| Human Services/Health Clinic | 1050 Loveland Blvd | 2011 | | 12,500 | | 2.15 | Public Bldgs. |
| CARE | 1501 Cooper St | 2002 | 1.93 | 5,074 | 5,074 | 1.93 | Public Bldgs. |
| Airport Road Annex - Supv of Elections Warehouse | 25500 Airport Rd | 1997 | 20.27 | 3,895 | 27,098 | 2.91 | Public Bldgs. |
| Airport Road Annex - Supv of Elections Office/Storage Bldg. | | 1997 | | 900 | | 0.67 | Public Bldgs. |
| Airport Road Annex - Main Building/Warehouse | | 1997 | | 14,760 | | 11.04 | Law Enf. |
| Airport Road Annex - Sheriff's Storage Bldg. | | 1997 | | 760 | | 0.57 | Law Enf. |
| Airport Road Annex - Old Radio Tower Bldg. | | 1997 | | 216 | | 0.16 | Public Bldgs. |
| Airport Road Annex - New Radio Tower Bldg. | | 2002 | | 216 | | 0.16 | Public Bldgs. |
| Airport Road Annex - Transit Bldg. | | 1992 | | 3,195 | | 2.39 | Public Bldgs. |
| Airport Road Annex - Gun Range | | N/A | | 2,940 | | 2.20 | Law Enf. |
| Airport Road Annex - Radio Tower | | 2002 | | 216 | | 0.16 | Public Bldgs. |
| Sheriff's Administration ⁽⁴⁾ | | 7474 Utilities Rd | | 1993 | | N/A | 61,956 |
| Englewood Annex - Admin Building | 6868 San Casa Dr | 1989 | 11.30 | 10,363 | 22,073 | 5.31 | Public Bldgs. |
| Englewood Annex - Admin Building Sheriff | 6868 San Casa Dr | 1989 | | 2,600 | | 1.33 | Law Enf. |
| Storage | N/A | N/A | | 196 | | 0.10 | Public Bldgs. |
| San Casa Yard - Mosquito Control | 6890 San Casa Dr. | 1992 | | 2,100 | | 1.08 | Public Bldgs. |
| San Casa Yard - Public Works | | 2009 | | 2,736 | | 1.40 | Public Bldgs. |
| Harbour Heights ⁽⁵⁾ | 27420 Voyageur Dr | 1936 | N/A | 4,807 | N/A | N/A | Public Bldgs. |
| South County Annex | 410 Taylor Rd | 1976 | 2.95 | 34,630 | 34,630 | 2.95 | Public Bldgs. |
| Medical Examiner | 18130 Paulson Dr | 1998 | 0.82 | 7,581 | 7,581 | 0.82 | Public Bldgs. |
| Charlotte County Jail | 26601 Airport Rd | 2000 | 44.20 | 295,312 | 369,641 | 35.31 | Law Enf. |
| Public Safety - EOC | | 2007 | | 28,970 | | 3.46 | Public Bldgs. |
| Work Release Building | | 2007 | | 12,954 | | 1.55 | Law Enf. |
| Video Visitation | | 2008 | | 3,505 | | 0.42 | Law Enf. |
| Training Armory | | 2008 | | 3,482 | | 0.42 | Law Enf. |
| Maintenance Building | | 2008 | | 2,159 | | 0.26 | Law Enf. |
| Tom Adams Bridge - Bridge Tender Building | | 1385 Beach Road | | 1975 | | 0.13 | 180 |
| Total - All Buildings | | | 179.03 | 1,145,031 | | 159.42 | - |
| Subtotal - Public Buildings | | | | 744,603 | | 106.32 | - |
| Subtotal - Law Enforcement Buildings | | | | 400,428 | | 53.10 | - |

(1) Source: Charlotte County

(2) Represents total square footage on each parcel. Some of the buildings on a site may be related to other service areas

(3) Total acres divided by total square footage (Item 2) and multiplied by the building square footage

Note: Buildings indicated as "Law Enforcement" include both law enforcement buildings and correctional facilities.