COMPASS Fiscal Impact Tool (FIT)

Carl Miller, AICP CTP, PMP, Principal Planner

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

Can You Answer the Following?

If a new subdivision is approved, can you afford the new services that will be required?

How would you know if your comprehensive plan is financially viable?

What is the financial impact of House Bill 389?

Can you answer any of these questions right now?

Today's Topic

- COMPASS
- Intro to Fiscal Impact
- COMPASS Fiscal Impact Tool
- Fiscal Impact Reporting
- House Bill 389
- Q&A

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

COMPASS

COMMUNITY PLANNING ASSOCIATION

of Southwest Idaho

INTRODUCTION TO FISCAL IMPACT

What is Fiscal Impact?

Revenues
Taxes, permits, fees

−

Expenditures
Operating, capital needs

=

Fiscal Impact

Services Evaluated

Transportation

Schools

Safety and Emergency Services

Parks and Recreation

Administration and much more…

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

What it is NOT

Economic Impact Tool

- Not jobs created
- Spillover effect

More than a Model or Tool

- Assumptions
- GIGO

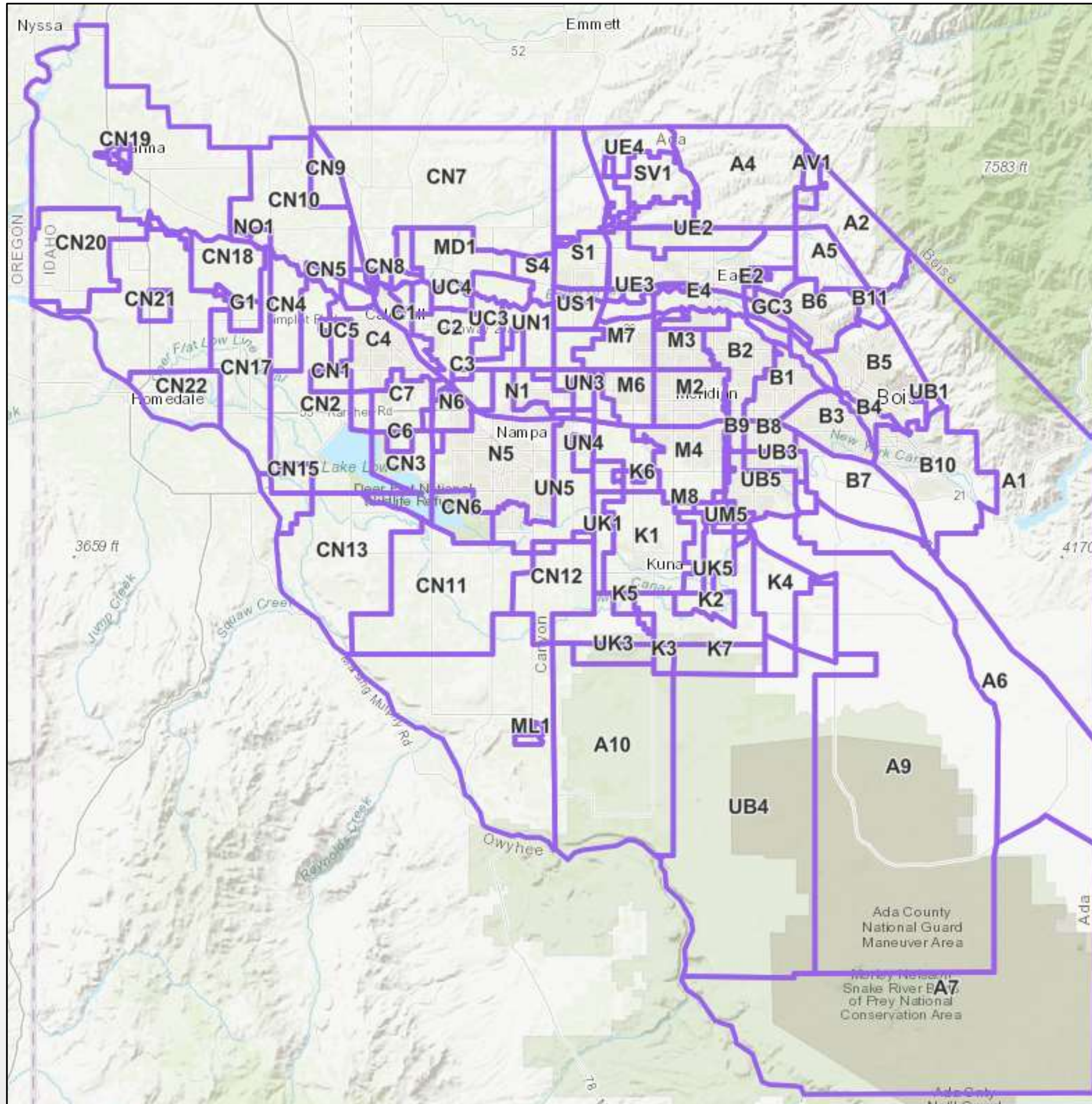
The “End All Be All”

- One of many factors

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

FISCAL IMPACT SCENARIOS

Fiscal Impact Subarea Map



Scenario Inputs

Single-family Residential Types

- 3 Typologies

Multi-family Residential

- 5 Typologies

Employment Types

- 15 Typologies

Mixed-Use

Represents 95% of development types

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

Demographic Profiles

Single Family Detached	Persons per Housing Unit [1]	Students per Housing Unit [2]	Vehicle Miles Traveled [3]	Law Enforcement Calls [4]	Fire/EMS Calls [5]
<$200,000	3.44	0.64	70.09	0.46	0.10
$200k-$300k	3.24	0.60	66.02	0.44	0.09
$300k-$400k	3.04	0.56	61.94	0.41	0.09
$400k-$500k	2.84	0.53	57.87	0.38	0.08
$500k-$600k	2.64	0.49	53.79	0.36	0.08
$600k+	2.44	0.45	49.72	0.33	0.07

Note: Demand factors are estimated by taking the average between the western towns and including a factor for being in unincorporated areas.

[1] Source: COMPASS analysis of U.S. ACS Survey 5-Year Estimates Data, 2017.

[2] Source: COMPASS analysis of U.S. ACS Survey 5-Year Estimates Data, 2017.

[3] Source: Trip Generation, Institute of Transportation Engineers, 10th Edition (2017); 2012 COMPASS Regional Household Travel Survey.

[4] Local call data is not available. City of Meridian Police Department data is used in lieu of local data. The average call rate is set to the average value home, other values are scaled based on household size.

[5] Local call data is not available. Ada County fire/ems countywide data is used in lieu of local data. The average call rate is set to the average value home, other values are scaled based on household size.

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

FISCAL IMPACT REPORTING

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

Reporting Table

B	C	D	E	F
City Impacts	*Base Year*	*1*	*2*	*3*
City Revenue	$0	$174,957	$18,757	$18,757
City Operating Costs	$0	($18,388)	($10,863)	($10,863)
City Capital Costs	$0	($6,001)	$0	$0
Cumulative Net Fiscal Impact	$0	$150,567	$158,461	$166,354
Annual Fiscal Impact		$150,567	$7,893	$7,893
County Impacts				
County Revenue	$0	$18,877	$13,187	$13,187
County Operating Costs	$0	($23,035)	($11,903)	($11,903)
County Capital Costs	$0	($18,276)	$0	$0
Cumulative Net Fiscal Impact	$0	($22,433)	($21,149)	($19,866)
Annual Fiscal Impact		($22,433)	$1,284	$1,284
School Impacts				
School Revenue	$0	$20,424	$20,424	$20,424
School Operating Costs	$0	$0	$0	$0
School Capital Costs	$0	$0	$0	$0
Cumulative Net Fiscal Impact	$0	$20,424	$40,849	$61,273
Annual Fiscal Impact		$20,424	$20,424	$20,424
Highway Impacts				
Highway Revenue	$0	$136,903	$3,959	$3,959
Highway Operating Costs	$0	($63)	($63)	($63)
Highway Capital Costs	$0	($175,379)	$0	$0
Cumulative Net Fiscal Impact	$0	($38,540)	($34,645)	($30,750)
Annual Fiscal Impact		($38,540)	$3,895	$3,895
VRT Impacts				
VRT Revenue	$0	$215	$215	$215
VRT Operating Costs	$0	($196)	($196)	($196)
VRT Capital Costs	$0	($52)	$0	$0
Cumulative Net Fiscal Impact	$0	($33)	($14)	$5
Annual Fiscal Impact		($33)	$19	$19

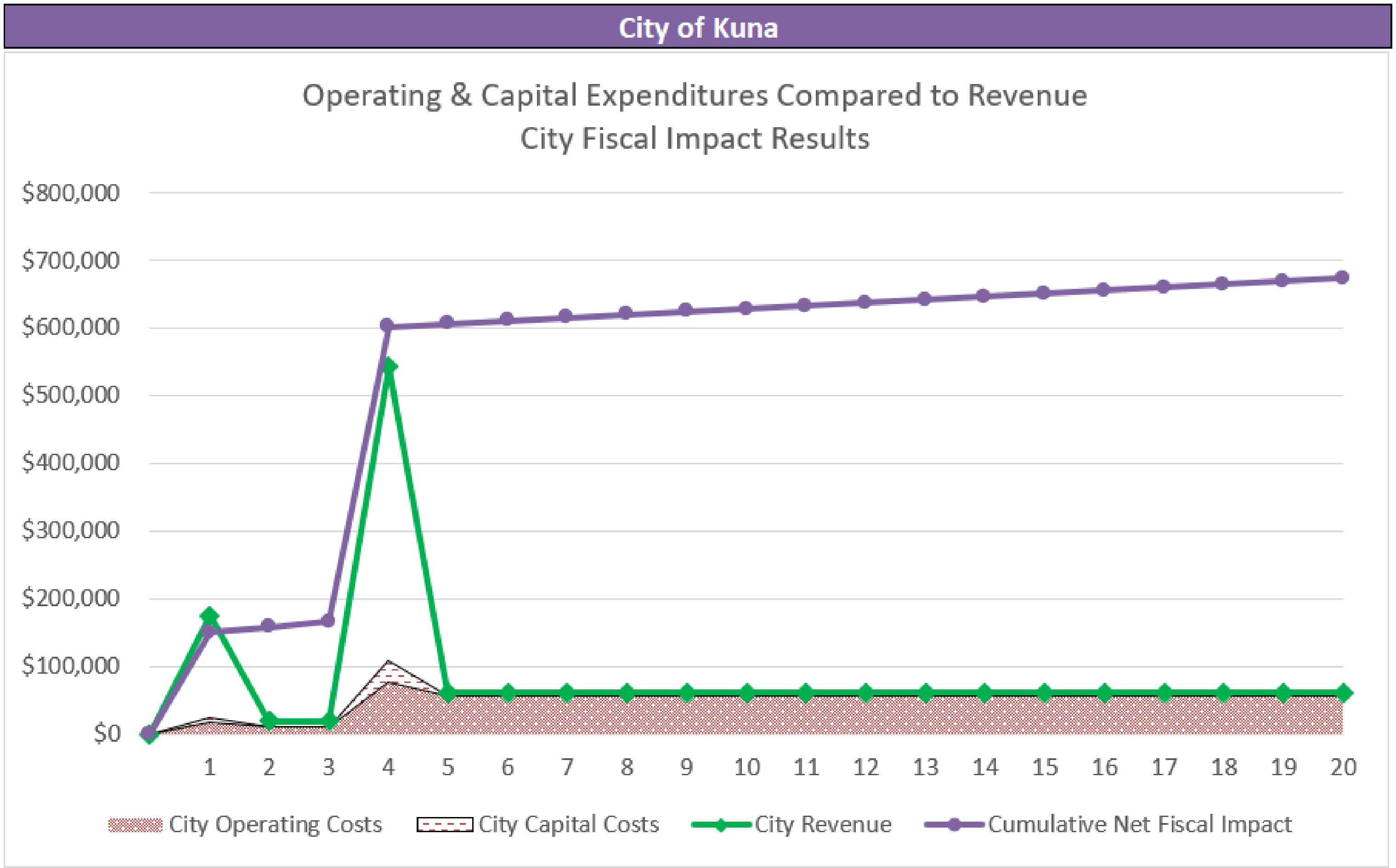
Jurisdiction		Break-Even Year	
Kuna	City Fiscal Impact	1	2021
Ada	County Fiscal Impact	Doesn't break-even	
Kuna	School Fiscal Impact	1	2021
Ada County	Highway Fiscal Impact	5	2025
	VRT Fiscal Impact	5	2025
	Grand Total Fiscal Impact	1	2021

Results are for a hypothetical example in Kuna:

- 20,000 square foot grocery store (Year 1)
- 50 MF units (Year 4)

COMPASS COMMUNITY PLANNING ASSOCIATION of Southwest Idaho

Reporting Chart



COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

Fiscal Impact Tool Use Policy

Communities in Motion 2050 Development Review

The Community Planning Association of Southwest Idaho (COMPASS) is the metropolitan planning organization (MPO) for Ada and Canyon Counties. COMPASS has developed this review as a tool for local governments to evaluate whether land developments are consistent with the goals of *Communities in Motion 2050* (CIM 2050), the regional long-range transportation plan for Ada and Canyon Counties. This checklist is not intended to be prescriptive, but rather a guidance document based on CIM 2050 goals.

Development Name:

CIM Vision Category: **New Jobs:**

CIM Corridor: **New Households:**

Safety
Pedestrian level of stress
Bicycle level of stress

Level of Stress measures how safe and comfortable a bicyclist or pedestrian would feel on a corridor and considers multimodal infrastructure number of vehicle lanes, and travel speeds.

Economic Vitality
Activity Center Access
Farmland Preservation
Net Fiscal Impact
Within CIM Forecast

These tools evaluate whether the location of the proposal supports economic vitality by growing near existing public services.

Quality of Life
Active Transportation
Automobile Transportation
Public Transportation
Roadway Capacity

Checked boxes indicate that additional information is attached.

Convenience
Nearest bus stop
Nearest public school
Nearest public park

Residents who live or work less than 1/2 mile from critical services have more transportation choices, especially for vulnerable populations.

Improves performance **Does not improve or reduce performance** **Reduces performance**

Comments:

Communities in Motion 2050
2020 Change in Motion Report
Development Review Process

Web: www.compassidaho.org
Email: info@compassidaho.org

COMPASS

Fiscal Impact Analysis

The purpose of the fiscal impact analysis is to better estimate expected revenues and costs to local governments as a result of new development so that the public, stakeholders, and the decision-makers can better manage growth. Capital and operating expenditures are determined by various factors that determine service and infrastructure needs, including: persons per household, student generation rates, lot sizes, street frontages, vehicle trip and trip adjustment factors, average trip lengths, construction values, income, and discretionary spending, employment densities.

Capital costs projected in the model reflect the potential cost to serve new growth, regardless of whether the resources are available to cover the costs and assumes that the districts will continue to balance their annual budgets considering financial guidelines and policies, applicable operating impacts, and available resources.

The COMPASS *Communities in Motion 2050* Development Checklist considers the level of fiscal benefits (whether the proposal provides revenues to exceed expenditures), how many public agencies benefit or are burdened by additional growth, and how long the proposal will take to achieve a fiscal break-even point, if at all.

More information about the COMPASS Fiscal Impact Tool is available at:

Overall Net Fiscal Impact

Net Fiscal Impact, by Agency

City County

Highway District School District

Break Even: 12 Years

EXAMPLE

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho

IDAHO HOUSE BILL 389

House Bill 389

House Bill 389	COMPASS FIT
Levies for new construction and annexation restricted to 90% of the taxable value	YES
Homeowner's Exemption increased to $125,000	YES
The maximum property tax increase cannot exceed 8%	PENDING
Forgone levying authority may be included in future budgets by an adjusted process: 1% for maintenance and operations, and 3% for capital projects	PENDING
Urban renewal district adjustments	PENDING

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho


McDonald's

Q&A and Thank You!

Source: California Dental Association

COMPASS
COMMUNITY PLANNING ASSOCIATION
of Southwest Idaho