
Public Facilities Needs Assessment

and Impact Fee Update

Prepared for the
Village of Menomonee Falls

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INTRODUCTION

Under Wisconsin Statutes 66.0617, municipalities may adopt impact fees to pay for the proportionate share of facilities needed to serve new development.

The Village of Menomonee Falls (Village) has seen and is expecting population growth and significant commercial, institutional and industrial development in the future. As a result, the Village has constructed expanded park, water supply, sanitary sewer and fire station facilities and is planning for additional facilities to meet the anticipated demands of future development. The Village initially implemented a sewer impact fee in 1995. In 2000, the Village added impact fees for water facilities and parks and updated the sewer impact fee. All three fees were again updated in 2006. In 2011, the Village updated the sewer, water and park fees and added a new impact fee for fire station facilities.

In 2014, the Village retained Trilogy Consulting to update the Public Facilities Needs Assessment and Impact Fee Study to update the parks, water supply, sanitary sewer and fire stations facilities needs and capital costs to serve the Village through the year 2035 and to determine appropriate and fair impact fees to recover a portion of the costs for those facilities. A history of previously adopted and current impact fees is shown in Table 1.

This report updates previous studies, satisfies the requirements of Wisconsin State Statute §66.0617, properly allocates the capital costs for the facilities between existing development and new development, and may be used by the Village as the basis for adopting a revised impact fee ordinance.

Table 1 - Adopted and Current Impact Fees per Single-Family Residence

Year Adopted	Parks	Water	Sewer	Fire	Total
1995			\$1,540		\$1,540
2000	\$1,339	\$1,624	\$1,578		\$4,541
2006	\$4,141	\$2,019	\$1,980		\$8,140
2011	\$2,454	\$2,328	\$2,447	\$1,596	\$8,825
Current Fees	\$2,682	\$2,544	\$2,674	\$1,744	\$9,644

AUTHORITY TO IMPOSE IMPACT FEES UNDER WISCONSIN STATUTES

In 1993, Wisconsin Act 305 created Section §66.55 (now §66.0617) of the Wisconsin Statutes, which provides the authority for cities, villages and towns to impose impact fees on new development for recovering capital costs of public facilities. The statute specifies the type of facilities for which impact fees may be imposed and prescribes the procedural requirements for impact fee ordinances enacted by a municipality. In 2006, the statute was amended by Wisconsin Acts 206 and 477. In 2008, the statute was again amended by Wisconsin Act 44.

Eligible Facilities

The impact fee statute allows the use of impact fees for a wide variety of public facilities projects. Impact fees may be used to pay for a proportionate share of capital costs of highways, traffic control facilities, sewerage facilities, storm water facilities, water supply facilities, parks facilities, solid waste and recycling facilities, fire protection facilities, law enforcement facilities, emergency medical facilities

and libraries that are necessary to serve related growth. However, impact fees may not be used for the purchase of vehicles and equipment or for school district facilities.

Eligible Costs

Impact fees may only be used to fund capital costs of public facilities, which are defined as the cost to construct, expand or improve public facilities. Eligible costs may include land, legal, planning, engineering and design costs.

Impact fees may not be used for operation and maintenance costs or to correct existing deficiencies in the public facilities for which they are imposed. Existing deficiencies may include:

- Facilities or portions of facilities that need to be replaced due to age or obsolescence.
- Improvements made to existing facilities to meet state or federal requirements or utilize improved technology.
- Facilities or portions of facilities that result in an improved design standard, or the difference between the future design standard, as it would apply to current population, and the actual existing facility.

The share of the costs to new development versus existing development must be computed based on explicitly defined service level standards. If new facilities are needed in order to meet certain service level standards, then a portion of the total capital costs may need to be allocated to meet an existing deficiency when determining the amount of total costs that are eligible to be recovered through the imposition of an impact fee.

Determining the Amount of the Fees

Impact fee law requires that impact fees must bear a rational relationship to the need for new, expanded or improved public facilities. This means that impact fees should not be charged to new development if that development is not likely to create a demand for a specific type of facility for which an impact fee is imposed. For example, most communities that charge an impact fee for libraries do not impose them on nonresidential development. It also means that the amount of the impact fee should be based on a reasonable estimate of the demand that a new development will create for public facilities. For services that serve both residential and nonresidential properties, such as water and sewer service, this requires finding a reasonable basis for determining the amount of capital costs of facilities are required for residential versus nonresidential development.

State law also dictates that impact fees cannot exceed the proportionate share of the capital costs required to serve new development as compared to existing development. Each facility must be analyzed to determine the share of the facility that is needed to provide the established service level to the existing development versus the excess facility space that is available to serve new development. The same service level should be applied to both existing and new development when determining if there is a portion of facilities that are needed to provide the desired service level to existing development.

Summary

Wisconsin impact fee law contains specific requirements for the process of adopting or amending an impact fee ordinance, for determining the amount that can be charged for an impact fee and for managing and spending impact fee revenues. Impact fees imposed under Wisconsin Statutes §66.0617 may not be used to correct any existing deficiencies in public facilities. Fees must also bear a rational relationship to the need for new, expanded or improved public facilities for which they are imposed and the fee may not exceed the proportionate share of capital costs required to serve new development versus existing uses. The impact fee charged to a property owner must also be reduced to compensate for other capital costs required by the municipality on land development to provide or pay for any public facilities for which impact fees are imposed. Wisconsin Statutes §66.0617 imposes additional standards and requirements upon the imposition of impact fees that may be relevant in particular situations.

In summary, it is important that a municipality that adopts impact fees:

- Prepares a public facilities needs assessment and conducts a public hearing;
- Ensures that the public facilities needs assessment contains all the items listed above, as prescribed by Wisconsin Statutes, and that the computed fee does not include any portion of capital costs that are needed to remedy any existing deficiencies or serve existing development;
- Follows the plan as laid out in the public facilities needs assessment in terms of the share of capital costs that are intended to be recovered through impact fees;
- Revises the needs assessment if specific projects change significantly and keeps detailed records of impact fees that have been paid, to be tracked in the event that impact fees need to be refunded to property owners.

INTRODUCTION

An important element of determining appropriate impact fees is projecting the amount of future development that will occur in the service area during the selected planning period. These projections are important for planning for the facilities needed to serve new development as well as calculating the proportionate cost of facilities per unit of development.

PLANNING PERIOD

The planning period for the park, water and sewer impact fees is 35 years, from 2000-2035. The planning period for the fire impact fees is shorter, from 2010 to 2035, as these fees were not implemented until 2011.

HISTORICAL AND FORECAST POPULATION, HOUSEHOLDS, AND RESIDENTIAL EQUIVALENT CONNECTIONS

The Village's park impact fees are established on the basis of population and dwelling units. Since the water and sewer impact fees are imposed on the basis of Residential Equivalent Connections (RECs), the relevant measure for projecting future development is new RECs. A REC is a measure of the amount of water demand or sewer flow used by the typical single-family residential connection. The fire impact fees are based on population and dwelling units for residential development and square footage of new construction for nonresidential development. Therefore, for this study, it is important to prepare forecasts of population, households, RECs, and acreage and square feet of new nonresidential development.

The forecasts were developed based on census data from 2000 and 2010, building permit data for 2010-2014, and numbers of impact fee and/or connection fee RECs collected each year for the period 1998-2014.

Table 2 shows the population and households in the Village based on data from the 2000 and 2010 U.S. Census and the Census Bureau estimate of January 1, 2013 population. An estimate of 2013 households was developed based on building permits issued during 2010-2012, which are shown in Table 3. As shown, the annual pace of residential development and population growth from 2010 to 2013 was roughly one-third of the average annual growth rate from 2000 to 2010.

Now that the Village has imposed impact fees for more than fifteen years, the actual pace of new connections to the water and sewer system can also be evaluated and compared to the population and housing data. Table 4 shows the number of new RECs by year for both sewer and water connections for the period 1998 through 2014. The average number per year over this entire period was 192 to 194. However, the table shows a significant drop in RECs per year beginning in 2008. The average per year was 269 to 271 for 1998-2007, but then dropped to 83 to 85 per year for 2008-2014. It is also worth noting that 2014 showed a bit of an uptick in both residential building permits and water and sewer RECs, even without data for the final two months of the year.

Table 2 - Population and Housing, 2000-2010

Year	Actual / Estimated Population	Actual / Estimated Households	Persons per Household
2000 ⁽¹⁾	32,647	12,844	2.54
2010 ⁽²⁾	35,626	14,567	2.45
2013 ⁽³⁾	35,924	14,744	2.44
Annual Growth, 2000-2010	298	172	
Annual Growth, 2010-2013	99	59	

Notes:

(1) 2000 Census

(2) 2010 Census

(3) U.S. Census Bureau population estimate. Households estimate based on number of 2010-2013 building permits, assuming 5% vacancy rate.

Table 3 - Residential Building Permits, 2010 - 2014

Year	Single Family		Multi-Family		Total	
	Units	Cost	Units	Cost	Units	Cost
2010	40	\$11,409,755			40	\$11,409,755
2011	33	\$12,436,674			33	\$12,436,674
2012	53	\$16,672,179			53	\$16,672,179
2013	60	\$19,124,854			60	\$19,124,854
2014 ⁽¹⁾	36	\$12,625,391	56	\$4,635,000	92	\$17,260,391
Total	222	\$72,268,853	56	\$4,635,000	278	\$76,903,853

Notes:

(1) Through October.

Source: U.S. Census Bureau.

Table 4 - Historical Collections of Residential Equivalent Connections for Sewer and Water Fees

Year	Water RECs	Sewer RECs
1998	276	276
1999	225	225
2000	163	163
2001	496	496
2002	184	184
2003	217	217
2004	424	424
2005	200	200
2006	293	276
2007	230	229
2008	92	94
2009	96	95
2010	75	71
2011	69	64
2012	55	52
2013	68	66
2014	139	139
Annual Average	194	192
Annual Average, 1998 - 2007	271	269
Annual Average, 2008-2014	85	83

Source: Village of Menomonee Falls.

Table 5 shows the actual, estimated and forecast increases in population, households and RECs for the periods 2000-2010, 2010-2013, 2010-2015, and 2015-2035, as well as the forecast total for the entire study period of 2000-2035. The forecast for 2010-2015 is based on the number of building permits issued and water and sewer RECs collected between January 1, 2010 and October 2014. The forecast for increases in population and households from 2015 through 2035 assumes an average annual increase that is approximately 1.5 times the 2010-2013 average or approximately half the average annual growth rate for 2000-2010. The forecasted numbers of RECs for 2015 through 2035 include one REC per anticipated new dwelling unit, plus additional RECs from nonresidential development. The ratio of total RECs to residential RECs was assumed to remain approximately equal to the average for the period 2000-2010.

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Chapter 2: Development Projections**

Table 5 - Historical and Forecast Population and Residential Equivalent Connections

Time Period	Increase in Population	Increase in Households	Persons per Household, New Households	New Residential Equivalent Connections			
				Total	Est. Residential	Est. Non-Residential	Ratio of RECs to Households
2000 - 2010 (actual)	2,979	1,723	1.73	2,387	1,723	664	1.39
2010 - 2013 (estimated)	298	172	1.73	193	172	21	1.12
2010 - 2015 (forecast) ⁽¹⁾	457	264	1.73	399	264	135	1.51
2015 - 2035 (forecast) ⁽²⁾	2,980	1,723	1.73	2,394	1,723	671	1.39
Total Increase, 2000-2035	6,416	3,710	1.73	5,180	3,710	1,470	1.40

Notes:

(1) Forecast increase in population and households between 2010 and 2015 is based on the number of building permits issued during 2010 through 2014, assuming a 5% vacancy rate and 1.73 persons per new household. Number of new RECs for 2010-2015 is the average of sewer RECs and water RECs collected from January 1, 2010 through October 2014.

(2) Forecast increase in population and households and collection of new sewer and water RECs between 2015 and 2035 is based on a growth rate of 1.5 times that experienced between 2010 and 2013 (or roughly half of the 2000-2010 annual growth rate).

EXISTING AND PLANNED LAND USE

The fire impact fee is imposed on nonresidential development on the basis of square footage of new construction. Therefore, for purposes of determining an appropriate fee per square foot, it is necessary to develop a forecast of future nonresidential development.

The Village's Comprehensive Plan was reviewed to compile data on acreage of existing and planned land uses, as summarized in Table 6. As indicated by the decreases in agricultural and unused rural/urban land, the recommended land use represents nearly full buildup of the Village. However, the forecast increase in households represents only about a 13.6 percent increase between 2010 and 2035. For purposes of this study, it was assumed that the increase in the amount of land developed for nonresidential purposes would be proportionate to the increase in households, or an increase of about 13.6 percent between 2010 and 2035. This amounts to development of 163 acres of commercial and public/institutional land uses and 152 acres of industrial uses.

Table 6 - Existing and Planned Land Use

Land Use Category	Recommended		
	Existing Land Use (Acres)	Land Use (Acres)	Change (Acres)
Residential	6,484	8,834	2,350
Commercial / Mixed Use / Office	706	1,070	364
Industrial	1,115	1,286	171
Government / Institutional	490	844	354
Agricultural	4,304	1,680	(2,624)
Transportation and Utilities	2,412	2,449	37
Park and Open Space	0	1,005	1,005
Recreation	975	45	(930)
Environmental / Floodway / Surface Water	4,522	4,737	215
Extractive	2	0	(2)
Landfill	340	340	0
Unused Rural / Urban	1,674	316	(1,358)
Total	23,024	22,606	(418)

Source: Village of Menomonee Falls Comprehensive Plan, adopted December 15, 2008, as amended from time to time. Existing and Recommended Land Use acres are summed from each of the area plans.

INTRODUCTION AND HISTORY

The Village first implemented a park impact fee in 2000. This fee was updated in 2006 based on the Village's 2006 Comprehensive Outdoor Recreation Plan (CORP). The CORP was updated for the years 2011 through 2015, revising the recommendations from the 2006 CORP to serve current and future needs of Village residents. The park impact fee was revised and updated in 2011 to reflect the actual costs of completed projects, and the revised plans and cost estimates for future projects. Since the 2011 impact fee update, the Village has continued to evaluate and adjust its plans for park facilities. This current study updates the park impact fee to reflect not only current forecasts of population and households, but also current plans and cost estimates for planned park facilities.

INVENTORY OF EXISTING FACILITIES

Since the beginning of the planning period is 2000, Table 7 shows the inventory of parkland as of 2000. At that time, the Village owned and maintained approximately 1291.8 acres of total parkland, of which 1256.1 was developed. Planned parkland through 2035 includes approximately 1500.7 acres, of which 1383.7 acres will be developed. The Village also plans to expand its system of linear parks, or recreational trails, from the existing 5.0 miles to 7.4 miles by 2035. This includes only those trails that are or will be located in parks or greenways, not bike lanes or trails within a road right-of-way.

SERVICE LEVEL STANDARDS AND DEFICIENCY / GROWTH ANALYSIS

Wisconsin Statutes require that a public facilities needs assessment (impact fee study) identify any deficiencies in existing facilities. It is also limits impact fees to recovering only the proportionate share of the cost of facilities required to serve new development as opposed to existing land uses, based on explicitly defined service level standards. Therefore, the share of the costs of planned park facilities related to remedying any existing deficiencies and the share related to serving new development must be identified.

The basis for the service level standards are the planned acres of total parkland and developed parkland and planned miles of recreational trails per 1,000 residents in 2035. Deficiencies in the existing acres of parkland and miles of trails as of 2000 were determined by applying the 2035 standards to the 2000 population to calculate how much, if any, additional acres of parks or miles of trails would have been needed to serve the 2000 Village population to the same service level standard.

The service level standards and amounts of parkland and miles of trails needed to address existing deficiencies are shown in Table 8. The future service level standard is the parkland the Village desires for its residents in terms of acres per 1,000 residents. Standards are calculated separately for each type of park and for parkland acquisition as distinct from parkland development, since the plans include some parks that will be acquired but not developed as well as some existing parkland that will be developed in the future. When these standards are applied to the 2000 population and compared to existing acres of parks as of 2000, the Village had deficiencies in mini parks, community parks and trail miles. Therefore a proportionate share of the new parks planned in each of these categories was allocated to existing deficiencies and may not be charged to new development in the form of impact fees.

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Table 7 - Existing and Planned Acres of Parkland

Park Classification	2000		New /		Planned 2035	
	Existing Land (acres) (¹)	Developed Parks (acres) (¹)	Planned Acquisition (acres) (²)	Planned Development (acres) (²)	Total Developed / Undeveloped Parkland (acres)	Planned 2035 Developed Parkland
Mini-Park						
Centennial Plaza	0.2	0.2			0.2	0.2
John Taylor Park	0.8	0.8			0.8	0.8
River Road Park			1.5	1.5	1.5	1.5
Subtotal	1.0	1.0	1.5	1.5	2.5	2.5
Neighborhood Park						
Kiwanis Park	3.3	3.3			3.3	3.3
Municipal Park	1.5	1.5			1.5	1.5
Subtotal	4.8	4.8	0.0	0.0	4.8	4.8
Community Park						
Oakwood Park	22.0		38.0	60.0	60.0	60.0
Riverside Park	18.0	18.0			18.0	18.0
Rotary Park	21.1	21.1	2.1	2.1	23.2	23.2
Village Park	18.0	18.0			18.0	18.0
Willowood Park	26.5	26.5			26.5	26.5
Willowood Community Forest Preserve	141.1	141.1			141.1	141.1
SW Community Park			47.3	47.3	47.3	47.3
NW Community Park			117.0		117.0	0.0
Subtotal	246.7	224.7	204.4	109.4	451.1	334.1
Special Purpose Park						
Mill Pond Park	1.7	1.7			1.7	1.7
Mill Pond Plaza	0.5	0.5			0.5	0.5
Old Falls Village Park	18.8	18.8			18.8	18.8
Pedestrian Bridge Park			3.0	3.0	3.0	3.0
Subtotal	21.0	21.0	3.0	3.0	24.0	24.0
Urban Green Space						
Lime Kiln Park	19.4	19.4			19.4	19.4
Maple Road Park	13.2			13.2	13.2	13.2
Menomonee River Pkwy	37.5	37.5			37.5	37.5
Rivers Edge Park	15.8	15.8			15.8	15.8
Tower Hill Park	22.4	22.4			22.4	22.4
Tamarack Preserve	910.0	910.0			910.0	910.0
Subtotal	1018.3	1005.1	0.0	13.2	1018.3	1018.3
Total Park Acreage	1291.8	1256.6	208.9	127.1	1500.7	1383.7
Recreational Trails (miles)						
Menomonee River Trail	3.0	3.0			3.0	3.0
Tamarack Trail	2.0	2.0			2.0	2.0
Pershing Avenue Trail			1.2	1.2	1.2	1.2
Rivers Edge / Rotary Park Trail			1.0	1.0	1.0	1.0
Bugline Trail Connection			0.2	0.2	0.2	0.2
Total Trail Mileage	5.0	5.0	2.4	2.4	7.4	7.4

Notes:

(1) Information regarding existing acres of parkland and developed parks is from the 2011-2015 Comprehensive Outdoor Recreation Plan.

Table 8 - Village-Owned Parks and Trails Service Level Standards and Deficiency/Growth Analysis

Park Type	Service Level			2000						2000		
	Desired Park Land (Acres)	2035 Forecast Population	Standard (Acres or Miles/1,000 Residents)	2000		Existing		Surplus / (Deficiency)	New Parks (acres)	Growth %	Deficiency %	
				2000 Population	Acres Required	Parks	(acres)					
Mini-Park	2.5	39,063	0.06	32,647	2.0	1.0	(1.0)	1.5	33%	67%		
Neighborhood Park - Acquired	4.8	39,063	0.12	32,647	3.9	4.8	0.9	0.0	100%	0%		
Neighborhood Park - Developed	4.8	39,063	0.12	32,647	3.9	4.8	0.9	0.0	100%	0%		
Community Park - Acquired	451.1	39,063	11.55	32,647	377.1	246.7	(130.4)	204.4	36%	64%		
Community Park - Developed	334.1	39,063	8.55	32,647	279.1	224.7	(54.4)	109.4	50%	50%		
Special Purpose Park - Acquired	24	39,063	0.61	32,647	19.9	21.0	1.1	3.0	100%	0%		
Special Purpose Park - Developed	24	39,063	0.61	32,647	19.9	21.0	1.1	3.0	100%	0%		
Urban Green Space - Acquired	1018.3	39,063	26.07	32,647	851.1	1018.3	167.2	0.0	100%	0%		
Urban Green Space - Developed	1018.3	39,063	26.07	32,647	851.1	1005.1	154.0	13.2	100%	0%		
Linear Park - Recreational Trails (miles)	7.4	39,063	0.19	32,647	6.2	5.0	(1.2)	2.4	50%	50%		

ALLOCATION OF COSTS AND PARK IMPACT FEE CALCULATION

A detailed list of completed and planned park facilities improvements and actual or estimated capital costs is shown in Table 9. The list of projects includes both near-term projects identified in the CORP and long-term projects that are anticipated to serve Village residents through 2035. The list of projects in the 2011 impact fee study was reviewed and updated by Village staff. Some projects were removed, new projects were added and the estimated costs of projects carried over from the last study were updated for inflation or known changes in plans or conditions. Project costs were allocated between the share of costs needed to serve future growth and development and costs needed to remedy existing deficiencies based on the percentages shown in Table 8 for each type of park and each project type (land acquisition, park development, and recreational trails).

Of the total of \$9.6 million of completed and planned projects, approximately 53 percent, or \$5.1 million, is allocated to future growth and therefore eligible for recovery through impact fees. The remaining 47 percent, or \$4.5 million, is attributable to existing deficiencies and must be funded by other sources. As the Village carries out these projects, the size, location, configuration or estimated costs may vary from this plan. However, the amount of impact fee revenues used to finance the projects should be based on the percentages shown in Table 9.

The calculation of the proposed park facilities impact fee is shown in Table 10. Based on the projected population increase of 6,416 residents between 2000 and 2035, impact fee eligible costs amount to \$803 per capita. The proposed fees per dwelling unit for three categories of residential units were calculated based on the costs of park facilities per capita and estimated persons per unit. The recommended impact fee per single family home is \$2,136, while the recommended fees per two-bedroom unit and one-bedroom or studio multi-family units are \$1,606 and \$1,004, respectively.

**Village of Menomonee Falls Impact Fee Update
Chapter 3: Park Impact Fee**

Table 9 - Planned Park Improvements, Estimated or Actual Costs and Allocation of Costs

	Park Type	Total Cost	Future Growth %	Deficiency %	Future Share of Costs	Deficiency Share of Costs
Completed Projects ⁽¹⁾						
Land Acquisition						
Oakwood Park	Community	\$430,000	36%	64%	\$154,800	\$275,200
River Road Park	Neighborhood	\$113,649	100%	0%	\$113,649	\$0
NW Community Park	Community	\$2,047,500	36%	64%	\$737,100	\$1,310,400
SW Community Park	Community	\$0	36%	64%	\$0	\$0
Park Development						
Oakwood Park	Community	\$2,291,459	50%	50%	\$1,145,730	\$1,145,730
Planned Projects ⁽²⁾						
Land Acquisition						
Pedestrian Bridge Park	Special Purpose	\$271,389	100%	0%	\$271,389	\$0
Rotary Park Expansion	Community	\$345,100	36%	64%	\$124,236	\$220,864
Park Development						
River Road Park	Mini	\$379,945	33%	67%	\$125,382	\$254,563
NW Community Park Design ⁽¹⁾	Community	\$40,000	50%	50%	\$20,000	\$20,000
SW Community Park Design ⁽¹⁾	Community	\$50,000	50%	50%	\$25,000	\$25,000
SW Community Park Development	Community	\$1,655,474	50%	50%	\$827,737	\$827,737
Pedestrian Bridge Park	Special Purpose	\$113,983	100%	0%	\$113,983	\$0
Maple Road Park	Urban Green Space	\$1,085,557	100%	0%	\$1,085,557	\$0
Rotary Park Expansion	Community	\$401,450	50%	50%	\$200,725	\$200,725
Recreational Trails						
Pershing Avenue	Linear Park	\$162,834	50%	50%	\$81,417	\$81,417
Rivers Edge Park	Linear Park	\$135,695	50%	50%	\$67,847	\$67,847
Bugline Trail Connection ⁽¹⁾	Linear Park	\$115,000	50%	50%	\$57,500	\$57,500
Subtotal Land Acquisition Costs		\$3,207,638	44%	56%	\$1,401,174	\$1,806,464
Subtotal Parkland Development Costs		\$6,017,868	59%	41%	\$3,544,114	\$2,473,755
Subtotal Recreational Trail Costs		\$413,528	50%	50%	\$206,764	\$206,764
Total Costs		\$9,639,035	53%	47%	\$5,152,052	\$4,486,983

Notes:

(1) Actual or estimated costs provided by Village staff.

(2) Except as otherwise noted, estimated costs for future projects are taken from the 2011 Impact Fee Study, adjusted for inflation using the Engineering News Record 20-City Construction Cost Index.

Table 10 - Park Impact Fee Calculation

<u>Impact Fee Costs per Capita</u>	
Total Impact Fee Eligible Costs	\$5,152,052
2000 - 2035 Population Increase	6,416
Impact Fee Costs per Capita	\$803.00
<u>Proposed Impact Fee Schedule</u> ⁽¹⁾	
Impact Fee per Three-Bedroom Unit or Single Family Home ⁽²⁾	\$2,136
Impact Fee per Two-Bedroom Unit ⁽³⁾	\$1,606
Impact Fee per Studio or One-Bedroom Unit ⁽⁴⁾	\$1,004

Notes:

(1) Average persons per unit are estimated based on data from the U.S. Census Bureau 2008-2012 Community Survey. Average persons per household for owner-occupied housing in the Village was 2.66; average persons per household for renter-occupied housing was 1.62.

(2) 2.66 persons per unit.

(3) 2.00 persons per unit.

(4) 1.25 persons per unit.

INTRODUCTION AND HISTORY

The 2000 impact fee study included projects identified to serve the portion of the Village that would continue to be served by groundwater and the portion planned to be served with Lake Michigan water, as identified in the 1997 Report on Water Supply Facilities-Milwaukee Lake Water Option prepared by Ruekert/Mielke. When the fee was updated in 2006, additional projects were identified as needed to serve new growth: from the 2005 Southwest Area Study Report completed by Ruekert/Mielke; and projects needed to facilitate the redevelopment of Main Street at higher densities.

Previous impact fee studies identified the share of project costs related to serving new development separately for each of four distinct service areas in the Village—the groundwater service area, the lake water service area, the southwest service area, and the Main Street redevelopment area. This report updates the 2011 study with actual costs for recently completed projects, updated cost estimates for projects not yet completed, and new forecasts of Residential Equivalent Connections.

The methodology for this study is the same methodology used in previous studies. The base year for the planning period, 2000, remains the same. The percentage allocations between costs related to serving future development versus existing deficiencies that were established in previous studies are used in this impact fee update.

SOUTHWEST SERVICE AREA FACILITIES AND COST ALLOCATION

Table 11 shows the completed and planned, actual and estimated costs, and the proportionate share of costs related to serving new development versus remedying existing deficiencies. Since the 2011 impact fee update, Well No. 10 and reservoir were completed. Several of the planned projects for this area are no longer expected to be completed. The estimated costs for remaining projects yet to be completed were updated for inflation.

Based on the amount of additional capacity needed to serve new development, as detailed in previous impact fee studies, it is estimated that 75 percent of the capacity of the well and booster station projects is attributable to serving new development. The southwest service area had excess storage as of 2000, so 100 percent of the planned storage facilities cost is attributable to serving new development.

Village of Menomonee Falls Impact Fee Update Chapter 4: Water Impact Fee

Table 11 - Southwest Service Area Water Project Costs

Project Description	Project ID Number	Total Capital Cost	Special Assessment Share	Net Water Utility Cost	Future Growth %	Deficiency %	Future Growth Share of Costs	Deficiency Share of Costs
Completed Projects ⁽¹⁾								
Taylor's Woods Booster Station	W-30	\$490,960	\$0	\$490,960	75%	25%	\$368,220	\$122,740
Well No. 10 and Reservoir	W-33	\$2,871,568	\$0	\$2,871,568	75%	25%	\$2,153,676	\$717,892
Projects Yet to Be Completed								
Geological Reconnaissance ⁽²⁾	W-32	\$19,540	\$0	\$19,540	75%	25%	\$14,655	\$4,885
Well No. 11 ⁽²⁾	W-34	\$1,632,677	\$0	\$1,632,677	75%	25%	\$1,224,508	\$408,169
400,000 Gallon Elevated Tank ⁽¹⁾	W-37	\$1,600,000	\$0	\$1,600,000	100%	0%	\$1,600,000	\$0
Total Southwest Service Area		\$6,614,746	\$0	\$6,614,746	81%	19%	\$5,361,059	\$1,253,686

Notes:

(1) Actual or estimated costs provided by Village staff.

(2) Cost estimates taken from the Southwest Area Water Study Report, Ruekert/Mielke, 2005, updated for inflation using the Engineering News Record 20-City Construction Cost Index.

MAIN STREET REDEVELOPMENT AREA FACILITIES AND COST ALLOCATION

Table 12 shows the completed and planned projects for the Main Street Redevelopment area, actual and estimated costs, and the proportionate share of costs allocated to future development. No projects were completed since the 2011 impact fee study. Costs for planned projects were updated for inflation. As detailed in previous impact fee studies, all of the projects planned for Main Street redevelopment area are needed to facilitate the higher densities planned for this area. Therefore, 100 percent of the costs were allocated to new development, as shown in Table 12.

Table 12 - Main Street Redevelopment Area Water Project Costs

Project Description	Total Capital Cost	Special Assessment Share	Net Water Utility Cost	Future Growth %	Deficiency %	Future Growth Share of Costs	Deficiency Share of Costs
Completed Projects ⁽¹⁾							
12" Loop in Polk Dr from Fond du Lac Ave to Jefferson Ave	\$475,900	\$0	\$475,900	100%	0%	\$475,900	\$0
Projects Yet to Be Completed ⁽²⁾							
12" Main in Kings Hwy, Rozanne Dr, Main St, and Pilgrim Rd	\$762,061	\$0	\$762,061	100%	0%	\$762,061	\$0
12" Main in Main St from Rozanne Dr to easement	\$247,507	\$0	\$247,507	100%	0%	\$247,507	\$0
12" Main in Fond du Lac Ave from Menomonee River Pkwy to Main St	\$412,512	\$0	\$412,512	100%	0%	\$412,512	\$0
12" Main in Main St from Fond du Lac Ave to easement	\$100,957	\$0	\$100,957	100%	0%	\$100,957	\$0
Total Main Street Redevelopment Area	\$1,998,936	\$0	\$1,998,936	100%	0%	\$1,998,936	\$0

Notes:

(1) Actual costs for completed projects provided by Village staff.

(2) Cost estimates provided by Village engineering staff in 2005, updated for inflation using the Engineering News Record 20-City Construction Cost Index.

GROUND WATER SERVICE AREA FACILITIES AND COST ALLOCATION

Since 2011, the Village completed a portion of the Lisbon Road / Town Line Rd water main project. Table 13 shows the actual costs for that project and other completed projects, the estimated costs for planned future projects, and the allocation of costs between future growth and deficiency. Costs for planned future projects were updated for inflation. Capital costs were reduced by the amount of actual or estimated special assessments to determine the net cost to the water utility and the percentage attributable to future growth was applied to the net cost to determine the future growth cost. The percentage of costs attributable to future growth is the same as was determined in previous studies.

Table 13 - Ground Water Service Area Project Costs

Project Description	Project ID Number	Total Capital Cost	Special Assessment Share	Net Water Utility Cost	Future Growth %	Deficiency %	Future Growth Share of Costs	Deficiency Share of Costs
Completed Projects ⁽¹⁾								
Well No. 9	W-1	\$360,700	\$0	\$360,700	86.2%	13.8%	\$310,923	\$49,777
Pump Station No. 9	W-2	\$1,418,503	\$0	\$1,418,503	86.2%	13.8%	\$1,222,750	\$195,753
Greenview Ave and Marcy Rd Water Main	W-3	\$320,647	\$257,755	\$62,892	86.2%	13.8%	\$54,213	\$8,679
Marcy Rd, Lisbon Rd, and Emerald Hills Dr Water Main	W-5A	\$565,316	\$319,151	\$246,165	86.2%	13.8%	\$212,194	\$33,971
Silver Spring Dr Water (Evergreen Ln-Town Line Rd)	W-6A	\$1,488,080	\$970,706	\$517,374	86.2%	13.8%	\$445,976	\$71,398
Lisbon Rd / Town Line Rd Water Main	W-29	\$693,822	\$245,160	\$448,663	86.2%	13.8%	\$386,747	\$61,915
Projects Yet to Be Completed								
Marcy Rd Water Main ⁽²⁾	W-3A	\$450,506	\$263,263	\$187,243	86.2%	13.8%	\$161,404	\$25,840
Lisbon Rd Water Main (Marcy Rd-Lannon Rd) ⁽²⁾	W-5B	\$1,046,477	\$611,531	\$434,946	86.2%	13.8%	\$374,923	\$60,023
Lannon Rd Water Main (Silver Spring Rd-Lisbon Rd) ⁽²⁾	W-5C	\$863,018	\$504,323	\$358,695	86.2%	13.8%	\$309,195	\$49,500
One Mile Rd Water Main (Silver Spring Rd-Lisbon Rd) ⁽²⁾	W-4A	\$982,429	\$574,103	\$408,326	86.2%	13.8%	\$351,977	\$56,349
Lisbon / Town Line Water Main (Taylors Ln-Redbud) ⁽³⁾		\$345,000	\$201,608	\$143,392	86.2%	13.8%	\$123,604	\$19,788
Total Ground Water Service Area		\$8,534,498	\$3,947,600	\$4,586,898	86.2%	13.8%	\$3,953,906	\$632,992

Notes:

(1) Actual costs for completed projects provided by Village staff.

(2) Cost estimates taken from 7/19/2005, *Distribution of Water Impact Fee Costs*, prepared by Village staff, updated for inflation using the Engineering News Record 20-City Construction Cost Index. Estimated special assessment share is based on the average percentage of cost assessed for the Marcy Road, Silver Spring Drive and Lisbon Road / Town Line Road water main projects.

(3) Cost estimate provided by Village staff, November 2014. Estimated special assessment share is based on the average percentage of cost assessed for the Greenview Ave, Marcy Road, Silver Spring Drive and Lisbon Road / Town Line Road water main projects.

LAKE WATER SERVICE AREA FACILITIES AND COST ALLOCATION

Table 14 shows the list of improvements, actual or estimate capital costs and the allocation of costs to future growth and deficiency for the lake water service area. A portion of the TID No. 8 extension was completed since 2011, so costs were updated to reflect the actual costs of that project. The list of projects was reduced to reflect current plans for this area, and the costs of projects yet to be completed were updated for inflation. Costs were reduced by the share of costs expected to be collected through special assessments. The share of costs allocated to future growth was calculated based on the percentage share determined in previous impact fee studies.

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Table 14 - Lake Water Service Area Project Costs

Project Description	Project	Special			Future	Deficiency	Growth	Deficiency
	ID	Total Capital	Assessment	Net Water				
Completed Projects ⁽¹⁾								
Pump Station 9	W-7	\$438,997	\$0	\$438,997	35.6%	64.4%	\$156,283	\$282,714
Silver Spring Booster Station	W-8	\$794,300	\$0	\$794,300	35.6%	64.4%	\$282,771	\$511,529
Bradley Rd Booster Station	W-9	\$1,357,165	\$0	\$1,357,165	35.6%	64.4%	\$483,151	\$874,014
Pump Stations 3 and 4 Modifications	W-10	\$81,557	\$0	\$81,557	35.6%	64.4%	\$29,034	\$52,523
Pump Station 5 Modifications	W-11	\$327,655	\$0	\$327,655	35.6%	64.4%	\$116,645	\$211,010
Town Hall / Lisbon Rd Water Main	W-12	\$201,352	\$0	\$201,352	35.6%	64.4%	\$71,681	\$129,671
Silver Spring Rd Water Main (124th to Lilly Rd)	W-13	\$764,007	\$335,243	\$428,764	35.6%	64.4%	\$152,640	\$276,124
Appleton Tank Water Main and Easements	W-14	\$312,999	\$131,081	\$181,918	35.6%	64.4%	\$64,763	\$117,155
Leon Rd / Fond du Lac Water Main	W-15	\$743,710	\$0	\$743,710	35.6%	64.4%	\$264,761	\$478,949
124th St, Hwy 145 Main St Water Main	W-16	\$1,025,035	\$536,667	\$488,368	35.6%	64.4%	\$173,859	\$314,509
Mill Rd, River Dr, Marach Rd Water Main	W-17	\$696,593	\$454,862	\$241,731	35.6%	64.4%	\$86,056	\$155,675
Appleton Ave, Parkway Dr Water Main	W-18	\$538,179	\$391,395	\$146,784	35.6%	64.4%	\$52,255	\$94,529
Lisbon and Pilgrim Rd Water Main	W-19	\$353,280	\$155,040	\$198,240	35.6%	64.4%	\$70,573	\$127,667
Richfield Way and Water St Water Main Interconnect	W-23	\$457,536	\$71,500	\$386,036	35.6%	64.4%	\$137,429	\$248,607
Shady Lane Water Main	W-24	\$462,065	\$432,161	\$29,904	35.6%	64.4%	\$10,646	\$19,258
SCADA Upgrade	W-26	\$214,800	\$0	\$214,800	35.6%	64.4%	\$76,469	\$138,331
Easement and Land Acquisition	W-25	\$26,700	\$0	\$26,700	35.6%	64.4%	\$9,505	\$17,195
TID No. 8 Falls Parkway - Phase I		\$300,634	\$0	\$300,634	35.6%	64.4%	\$107,026	\$193,609
Projects Yet to Be Completed								
County Line Rd Water Main ⁽²⁾⁽⁴⁾	W-21	\$750,800	\$408,480	\$342,320	35.6%	64.4%	\$121,866	\$220,454
TID No. 8 Falls Parkway - Phase II ⁽²⁾		\$460,000	\$0	\$460,000	35.6%	64.4%	\$163,760	\$296,240
Town Hall Rd Extension ⁽³⁾⁽⁴⁾		\$423,367	\$230,337	\$193,030	35.6%	64.4%	\$68,719	\$124,311
Total Lake Water Service Area		\$10,730,731	\$3,146,766	\$7,583,965	35.6%	64.4%	\$2,699,892	\$4,884,074

Notes:

(1) Actual construction costs provided by Village staff.

(2) Cost estimates provided by Village staff as of November 2014.

(3) Estimated costs are from *Distribution of Water Impact Fee Costs*, 7/19/2005, prepared by Village staff, updated for inflation using the Engineering News Record 20-City Construction Cost Index.

(4) Special assessment share is based on the average percentage of costs assessed for complete projects with special assessments (54.4%).

SUMMARY OF COST ALLOCATION AND IMPACT FEE CALCULATION

Table 15 summarizes the net water utility costs and allocation of cost between future growth and deficiency for each of the four service areas. All assumptions regarding the percentage allocations between future growth and deficiency are identical to the previous studies. Overall, approximately \$14.0 million, or 67 percent of the total \$20.8 million, is attributable to future growth and therefore eligible for recovery through impact fees, while the remaining \$6.8 million or 33 percent cannot be recovered through impact fees.

Based on this allocation of costs and the forecast addition of 5,180 new Residential Equivalent Connections between 2000 and 2035, the proposed water impact fee is \$2,706 per REC.

**Village of Menomonee Falls Impact Fee Update
Chapter 4: Water Impact Fee**

Table 15 - Summary of Water Facilities Costs Attributable to Future Development

	Net Water Utility Costs	Future Growth %	Deficiency %	Future Growth Share of Costs	Deficiency Share of Costs
Southwest Service Area	\$6,614,746	81.0%	19.0%	\$5,361,059	\$1,253,686
Main Street Redevelopment Area	\$1,998,936	100.0%	0.0%	\$1,998,936	\$0
Ground Water Service Area	\$4,586,898	86.2%	13.8%	\$3,953,906	\$632,992
Lake Water Service Area	\$7,583,965	35.6%	64.4%	\$2,699,892	\$4,884,074
Total	\$20,784,545	67.4%	32.6%	\$14,013,793	\$6,770,752

Table 16 - Water Impact Fee Calculation

Impact Fee Eligible Costs	\$14,013,793
Projected Number of RECs <u>between 2000 and 2035</u>	<u>5,180</u>
Impact Fee per REC	\$2,706

INTRODUCTION AND HISTORY

The sewer impact fee study in 1995, as well as updates to that study in 2000, 2006 and 2011, identified numerous improvements needed to expand the Village's sanitary sewer system capacity to serve future development. The majority of the improvements were identified in the 2000 Sanitary Sewerage System Plan, and consisted of new and expanded trunk sewers, interceptor sewers and pump stations. In addition, the Village purchased additional wastewater treatment capacity in two expansions of the Sussex Wastewater Treatment Facility. The impact fee study completed in 2000 included detailed analysis of existing and future wastewater flows and sanitary sewer system capacities in order to determine the appropriate share of costs to allocate to future growth and existing deficiencies for each planned improvement. This report updates the capital costs with actual costs for projects recently completed and updated cost estimates for remaining projects yet to be completed.

SANITARY SEWER FACILITIES AND COST ALLOCATION

Table 17 (on the following page) shows the actual costs of completed projects and estimated costs for planned projects that have not yet been completed. Since the 2011 impact fee study, two projects were completed, the Section 31 sewers and the Basin 10 Interceptor. Village staff reviewed the list of proposed projects and identified several that are no longer planned or are not expected to be completed within the planning period, leaving only two remaining projects.

Total costs for the projects were reduced to account for contributions from special assessments and Tax Incremental Finance District revenues. The percentage of capacity attributable to the need to serve future development was applied to the net cost to the sewer utility to determine the proportionate share of cost attributable to future development. Developer contributions were received for some of the projects, and these contributions were credited towards the future development share of costs, reducing the amount to be recovered through impact fees. As shown, of the total anticipated project costs of \$28.8 million, approximately \$13.0 million is attributable to the need to serve future development and may be recovered through impact fees. Based on the recoverable costs and the projected increase of 5,180 RECs between 2000 and 2035, the proposed sewer impact fee per REC is \$2,520.

Table 18 - Sewer Impact Fee Calculation

Impact Fee Eligible Costs	\$13,054,839
Projected Number of RECs between 2000 and 2035	5,180
Impact Fee per REC	\$2,520

Village of Menomonee Falls Impact Fee Update
Chapter 5: Sewer Impact Fee

Table 17 - Allocation of Sanitary Sewerage Project Costs

Project Description	Project ID	Total Capital Cost	Special Assessment / TIF Share		Future Growth %	Future Growth Cost	Developer Contribution	Net Future Growth Cost
			Net Cost	TIF Share				
Completed Projects ⁽¹⁾								
Trunk Sewer 1	s-2	\$67,658	\$0	\$67,658	51.9%	\$35,115		\$35,115
Section 12 Interceptor	s-20	\$53,967	\$0	\$53,967	94.3%	\$50,891	\$53,967	\$0
Tamarack Trail Interceptor	s-21	\$191,018	\$0	\$191,018	94.4%	\$180,321	\$191,018	\$0
Hale Ave Interceptor	s-22	\$185,500	\$0	\$185,500	100.0%	\$185,500		\$185,500
Section 23 Interceptor	s-23	\$226,748	\$0	\$226,748	94.3%	\$213,823	\$200,148	\$13,675
Sussex WTF	s-24	\$1,913,426	\$521,791	\$1,391,635	61.1%	\$850,289		\$850,289
Lannon Interceptor	s-25	\$324,100	\$256,396	\$67,704	88.9%	\$60,189		\$60,189
Lannon Interceptor Pump Station	s-26	\$837,200	\$662,309	\$174,891	61.1%	\$106,858		\$106,858
Silver Spring Interceptor	s-27	\$6,594,100	\$4,594,200	\$1,999,900	88.9%	\$1,777,911		\$1,777,911
Silver Spring Interceptor Pump Station	s-28	\$516,200	\$336,300	\$179,900	61.1%	\$109,919		\$109,919
Brookfield WFT and Riverview Interceptor	s-29	\$886,867	\$0	\$886,867	13.5%	\$119,727		\$119,727
Section 12 Interceptor	s-30	\$253,463	\$253,463	\$0	94.3%	\$0		\$0
Tamarack Trail Interceptor	s-31	\$1,266,847	\$817,091	\$449,756	94.4%	\$424,570		\$424,570
Section 1 Interceptor	s-32	\$1,129,000	\$1,129,000	\$0	94.4%	\$0		\$0
Section 25 Interceptor	s-33	\$283,300	\$0	\$283,300	94.4%	\$267,435		\$267,435
Appleton Ave and 124th St	s-34	\$708,934	\$663,981	\$44,953	75.0%	\$33,715		\$33,715
Trunk Sewer 5	s-4	\$892,243	\$0	\$892,243	15.2%	\$135,621		\$135,621
Trunk Sewer 17	s-10	\$161,602	\$0	\$161,602	17.3%	\$27,957		\$27,957
Trunk Sewer 18	s-11	\$199,546	\$0	\$199,546	21.1%	\$42,104		\$42,104
Trunk Sewer 19	s-12	\$955,726	\$0	\$955,726	24.5%	\$234,153		\$234,153
Trunk Sewers 22 and 23	s-13	\$604,638	\$0	\$604,638	0.0%	\$0		\$0
Trunk Sewers 6a and 6b	s-5	\$3,383,669	\$0	\$3,383,669	79.3%	\$2,683,250		\$2,683,250
Sussex WTF Expansion	s-19	\$1,877,778	\$0	\$1,877,778	85.2%	\$1,599,867		\$1,599,867
Section 31 Sewers	s-15	\$3,422,749	\$416,751	\$3,005,998	84.8%	\$2,549,086		\$2,549,086
Basin 10 Interceptor	s-35	\$179,288	\$14,196	\$165,092	88.9%	\$146,767		\$146,767
Projects Yet to be Completed ⁽²⁾								
Sewer from Menomonee River Pkwy to Main St	Main St	\$880,387	\$0	\$880,387	100.0%	\$880,387		\$880,387
Trunk 14 Sanitary Sewer - El Rio Drive	Main St	\$770,745	\$0	\$770,745	100.0%	\$770,745		\$770,745
Total		\$28,766,699	\$9,665,479	\$19,101,221	70.6%	\$13,486,199	\$445,133	\$13,054,839

Notes:

(1) Actual costs, special assessments and developer contributions provided by Village staff.

(2) Estimated costs taken from the 2011 impact fee study, updated for inflation using the Engineering News Record 20-City Construction Cost Index.

INTRODUCTION AND HISTORY

In 2011, the Village adopted a fire facilities impact fee for the first time. The impact fee was based on the Fire Department's 5-year capital improvement plan. That plan included expansion of two the Village's existing fire stations, replacement of one existing station with a larger station, and construction of a new station in the southwest area of the Village to serve future development in that area. Since 2011, some of the improvements have been completed. This report updates the analysis of deficiency and growth based on the facility space provided by the new facilities and updates the costs to reflect actual costs for completed facilities and current cost estimates for planned facilities. As noted in Chapter 2, the base year of the planning period for the fire impact fee is 2010, as this was the base year used in the 2011 impact fee study that first developed the proposed fees. The planning period has been extended out five additional years, to 2035, for this impact fee update.

EXISTING FACILITIES, EQUIPMENT AND STAFFING

The analysis of existing deficiencies and additional space needed to serve future development was based on staffing needs and vehicle and equipment storage needs. Therefore the inventory of existing facilities also examined existing staffing levels and vehicles and equipment.

Table 19 provides an inventory of existing Village Fire Stations and amount of space by function as of 2010. Although the layout and specific rooms vary significantly by station, the various types of space can generally be categorized as either space provided for station personnel (administrative functions or living quarters) or space provided for vehicles and apparatus (garage space). Station No. 3 is the largest and houses the main administration activities of the department. Total space at all four stations includes 18,498 square feet for personnel activities and 14,794 for vehicle and apparatus storage.

Table 20 shows the number of personnel by position within the department as of 2010. The department uses a mix of full-time, part-time, paid-on-call and volunteer staffing. Most of the administrative or management positions are full-time, while the majority of firefighter/EMT positions are part-time or paid-on-call. As the Village grows, there may be a need to replace part-time and paid-on-call positions with more full-time positions. In total, in 2010, the Village had 110 fire department personnel, or 3.09 per 1,000 residents.

Table 21 lists the vehicles and apparatus housed at each station as of 2010. The Village had a total of 22 pieces of equipment, or one for every five personnel.

Existing deficiencies in the department's facilities, staffing and vehicles as of 2010 were identified by the Fire Chief. Station No. 1 was an older building in need of significant renovation or replacement, and was also lacking in garage space to house all of the vehicles and apparatus stored at that station. Station No. 2 was short of space for living quarters, lockers and showers to allow for 24/7 staffing. Similarly, Station No. 4 lacked sleeping quarters to allow for 24/7 staffing.

Village of Menomonee Falls Impact Fee Update Chapter 6: Fire Impact Fee

Table 19 - Inventory of Existing Fire Department Facilities

Location	Space Type	Area (SF)
Station No. 1	Administration	478
	Laundry	1,087
	Boiler Room	478
	Bathrooms	96
	Hall	162
	Workout Room	334
	Lounge	511
	Kitchen	144
	Dining Area	282
	Training Room	1,156
	<u>Subtotal Admin / Living Quarters</u>	<u>4,728</u>
	<u>Garage Space</u>	<u>2,129</u>
	<u>Total Usable Interior Space</u>	<u>6,857</u>
Station No. 2	Administration	285
	Training Area	462
	Sleeping Quarters	153
	Bathrooms	239
	Kitchen	87
	Lounge	87
	<u>Subtotal Admin / Living Quarters</u>	<u>1,313</u>
	<u>Garage Space</u>	<u>3,972</u>
	<u>Total Usable Interior Space</u>	<u>5,285</u>
Station No. 3	Administration	2,660
	Kitchen / Dayroom	702
	Fitness Room	414
	Office	316
	Sleeping Quarters	840
	Maintenance / Radio Room	960
	Bathrooms / Showers	192
	Lobby	645
	Public Bathrooms	456
	Classrooms	2,146
	Closet	112
	Computer Server Room	62
	<u>Subtotal Admin / Living Quarters</u>	<u>9,505</u>
	<u>Garage Space</u>	<u>4,800</u>
	<u>Total Usable Interior Space</u>	<u>14,305</u>
Station No. 4	Laundry	184
	Generator Storage	218
	Mezzanine	964
	Training Room	632
	Kitchen	125
	Bathrooms / Showers	520
	Radio Room	166
	Office	143
	<u>Subtotal Admin / Living Quarters</u>	<u>2,952</u>
	<u>Garage Space</u>	<u>3,893</u>
	<u>Total Usable Interior Space</u>	<u>6,845</u>
Total Administrative Space		18,498
Total Garage Space		14,794
Total Usable Interior Space		33,292

Source: Menomonee Falls Fire Department, May 24, 2011 memo.

Notes:

(1) Excludes "unassigned" space for circulation, etc.

Table 20 - Existing (2010) Fire Department Staffing

Position	2010 Staffing
Fire Chief	1.0
Assistant Fire Chief (part-time)	1.0
Deputy Chief of Staff	1.0
Deputy Chief of Operations (part-time)	1.0
Fire Prevention Captain	1.0
Fire Training Captain	1.0
Office Coordinator (civilian)	1.0
Shift Lieutenant	2.0
Full-Time Firefighter/EMT	8.0
Part-Time Firefighter/EMT	21.0
Paid-on-Call Firefighter/EMT	27.0
Standby Volunteer	45.0
 Total Personnel	 110.0
 Number of Employees per 1,000 People	 3.09

Source: Village of Menomonee Falls.

Table 21 - Inventory of Existing (2010) Fire Department Vehicles and Equipment

Location	Vehicle Type	Inventory
Station No. 1	Engine	2
	Tender	1
	Ambulance	1
Station No. 2	Ladder	1
	Ambulance	1
	Brush Unit	1
	Tender	1
	Mobile Command Post	1
Station No. 3	Engine	1
	Ladder	1
	Heavy Rescue	1
	First Responder / Mini-pumper	1
	Shift Supervisor Vehicle	1
	Ambulance	1
Station No. 4	Engine	1
	Haz Mat Trailer	1
	Rehab Trailer	1
	Trench Rescue Unit	1
	Mobile Generator	1
	Ambulance	1
	Survive Alive Mobile Training Unit	1
Total Vehicles		22
Personnel per Vehicle		5.00

Source: Village of Menomonee Falls website.

SERVICE LEVEL STANDARDS AND DEFICIENCY / GROWTH ANALYSIS

Wisconsin Statutes require that a public facilities needs assessment (impact fee study) identify any deficiencies in existing facilities. It is also limits impact fees to recovering only the proportionate share of the cost of facilities required to serve new development as opposed to existing land uses, based on explicitly defined service level standards.

The basis for the service level standards were the planned square feet of administrative and living quarters space per on-duty personnel and the square foot of space per vehicle in 2035. Deficiencies in the existing facilities as of 2010 were determined by applying the 2035 standards to the 2010 desired staffing levels and vehicles to calculate how much, if any, additional square feet of facility space would have been needed to house the departments operations in 2010 to the same service level standard.

Table 22 summarizes the development of the service level standards for space per on-duty personnel and garage space per vehicle. The first part of the table shows the existing facility space as of 2010, the desired number of personnel on duty for each shift, and the number of vehicles kept at each station. This analysis assumes the desired 24/7 staffing at Stations No. 2 and 4 in order to identify to what extent these two stations are deficient in existing facility space needed to provide the desired level of service as of 2010.

As shown, the average amount of administrative and/or living quarter space per on-duty personnel was approximately 1,423 square feet. However, this included a significant amount of inefficient space at Station No. 1. Station No. 3 has less space per on-duty personnel; however less space is required since the majority of these staff are administrative staff. Recently constructed fire stations in similarly-sized communities generally provide approximately 2,000-2,500 square feet of space per on-duty personnel, including sleeping and living quarters for 24/7 staffing.

This analysis also highlights the relative lack of garage space at Station No. 1. General guidelines recommend approximately 800 square feet per vehicle. Stations No. 2 and 3 provide adequate space. Several of the pieces of equipment housed at Station No. 4 are smaller trailers or vehicles, so less space per vehicles is required.

Table 22 also shows the recommended facility space for each station to serve the Village through the planning period. The planned facilities reflect the actual size of the newly constructed Stations No. 1 and 5, completed since the 2011 impact fee study. In total, the Village plans to increase its administrative and living quarter's space by approximately 7,482 square feet and its fire garage space by approximately 4,271 square feet. These facilities would allow the Village to have a new Station No. 1 with an updated layout and facilities, and space for one additional person on-duty per shift and adequate vehicle storage. It would also allow the Village to provide 24/7 staffing at Stations No. 2 and 4 and provide a new station in the developing southwest are of the Village. In total, the planned facilities would accommodate 16 personnel on-duty per shift (including up to 7 administrative during daytime hours at Station No. 3) and 26 vehicles, providing an average of 1,624 square feet per on-duty personnel and 733 square feet per vehicle.

**Village of Menomonee Falls Impact Fee Update
Chapter 6: Fire Impact Fee**

Table 22 - Summary of Existing Facilities and Recommended Future Facilities

<u>Summary of Current Facilities</u>								
Location	Admin / Living		Personnel per Shift	SF / Person	Garage Space (SF)	No. of Vehicles	SF / Vehicle	Total Usable Interior Space (SF)
	Quarters (SF)	Space (SF)						
Station No. 1	4,728	1	4,728	2,129	4	532	6,857	
Station No. 2	1,313	1	1,313	3,972	5	794	5,285	
Station No. 3	9,505	9	1,056	4,800	6	800	14,305	
Station No. 4	2,952	2	1,476	3,893	7	556	6,845	
Total	18,498	13	1,423	14,794	22	672	33,292	

<u>Forecast Future Facilities</u>								
Location	Admin / Living		Personnel per Shift	SF / Person	Garage Space (SF)	No. of Vehicles	SF / Vehicle	Total Usable Interior Space (SF)
	Quarters (SF)	Space (SF)						
Station No. 1 - Renovation / Replacement ⁽¹⁾	5,000	2	2,500	3,200	4	800	8,200	
Station No. 2 - Addition	2,513	1	2,513	3,972	5	794	6,485	
Station No. 3 - No change	9,505	9	1,056	4,800	6	800	14,305	
Station No. 4 - Addition	3,962	2	1,981	3,893	7	556	7,855	
Station No. 5 - New Station ⁽¹⁾	5,000	2	2,500	3,200	4	800	8,200	
Total	25,980	16	1,624	19,065	26	733	45,045	

Notes:

(1) Usable interior space estimated based on total gross area of 8,804 square feet, garage space of 3,200 square feet, and assuming approximately 10% of the administrative/living quarters area is "unassigned" space.

Table 23 shows the analysis of deficiencies in existing facility space, in terms of square feet, and the proportionate shares of new facilities needed to remedy existing deficiencies and serve future development. The service level standards were defined as the approximate total planned amount of administrative/living quarter space per on-duty personnel and the total amount of garage space per vehicle. These standards were then applied to the desired number of on-duty personnel per shift and current number of vehicles as of 2010 to calculate the amount of facility space required in 2010 to provide the same level of service. The required facility space was compared to the actual amount of facility space provided to quantify any deficiencies in facility space, and the percentage of the planned increase in facility space needed to remedy those existing deficiencies versus the percentage of space to serve future development was calculated.

Based on the 2035 service level standards the Department had facility space deficiencies of 2,611 square feet in administrative space and living quarters and 1,338 square feet in garage space. Therefore only 65 percent of the planned expansion in administrative space and living quarters and 69 percent of the planned expansion in garage space can be attributed to the need to serve future development.

Table 23 - Fire Department Service Level Standards & Deficiency / Growth Analysis

Building Area	2035 Service Level Standard (SF)			Required Existing Facilities using 2035 Standards (SF)			Existing Facilities (SF)	Surplus / (Deficiency) (SF)	Growth %	Deficiency %
	2035 Facilities Space (SF)	2035 No. of Staff and Vehicles	No. of Employee or Vehicle per	Existing Staff and Vehicles	Existing Standards (SF)					
Admin / Living Quarters	25,980	16	1,624	13	21,109	18,498	(2,611)	65%	35%	
Garage Space	19,065	26	733	22	16,132	14,794	(1,338)	69%	31%	
Combined	45,045				37,241	33,292	(3,949)	66%	34%	

ALLOCATION OF COSTS AND FIRE IMPACT FEE CALCULATION

Table 24 shows the actual or estimated capital costs to expand and improve the Village's fire station facilities and the allocation of those costs between the proportionate shares to remedy existing deficiencies and serve future development. Costs were updated from the previous impact fee study to reflect actual costs for Stations No. 1 and 5 and updated estimates for Stations No. 2 and 4.

A large portion of the new Station No. 1 was a replacement of the station that was in use as of 2010, so the share of costs related to replacing that station were treated as existing deficiencies. Costs for other station improvements were allocated according to the percentages developed in Table 23, depending on whether the improvement was an expansion of administrative and living quarters space or garage space.

In total, of the estimated \$7.0 million in improvements, approximately \$2.8 million, or 41%, is attributable to the need to serve future development and may be recovered through impact fees. The remaining \$4.2 million, or 59%, is needed to remedy existing deficiencies and must be funded from other sources.

Since the fire department serves both residential and nonresidential development, the impact fee eligible costs must also be allocated between residential and nonresidential development. As in the previous impact fee study, costs were allocated between broad categories of land use on the basis of the anticipated equalized value of new development in each category. The projected value of development for residential, industrial and commercial/institutional development is shown in Table 25. Based on the number of new residential dwelling units and acres of nonresidential development between 2010 and 2035, and using some assumptions about value per unit and nonresidential floor area ratios, it is expected that approximately 70 percent of new property value will be residential development, while approximately 12 percent will be industrial and 18 percent will be commercial and institutional. While institutional property may be tax-exempt and not assessed by the Village, for purposes of this analysis, this property does have value that is protected by the Fire Department.

Village of Menomonee Falls Impact Fee Update Chapter 6: Fire Impact Fee

Table 24 - Deficiency / Growth Allocation of Costs to Upgrade Fire Department Facilities

Location	Description ⁽⁴⁾	Estimated / Actual Cost	Future Growth %	Deficiency %	Future Share of Costs	Deficiency Share of Costs
Station No. 1 ⁽¹⁾	Replace Existing Space (6,857 sf)	\$2,707,367	0%	100%	\$0	\$2,707,367
	Additional Space (1,387 sf)	\$547,633	69%	31%	\$376,083	\$171,550
	Subtotal Station (8,244 sf)	\$3,255,000	12%	88%	\$376,083	\$2,878,917
Station No. 2 ⁽²⁾	Addition to Station (add living quarters, locker rooms and showers)	\$339,996	65%	35%	\$221,359	\$118,637
Station No. 3	None	\$0	0%	0%	\$0	\$0
Station No. 4 ⁽²⁾	Addition to station (add sleeping quarters)	\$283,330	65%	35%	\$184,466	\$98,865
Station No. 5 ⁽¹⁾⁽³⁾	New station					
	Administrative space	\$2,181,463	65%	35%	\$1,420,269	\$761,194
	Garage space	\$743,537	69%	31%	\$510,618	\$232,918
	Land Acquisition	\$200,000	66%	34%	\$132,026	\$67,974
	Subtotal Station No. 5	\$3,125,000	66%	34%	\$2,062,914	\$1,062,086
Total		\$7,003,327	41%	59%	\$2,844,821	\$4,158,506

Notes:

(1) Actual costs provided by Village staff, November 2014.

(2) Estimated costs are taken from the 2011 impact fee study, inflated using the Engineering News Record 20-City Construction Cost Index.

(3) Split between costs for garage space versus administrative and living quarter space is based on the estimates used in the 2011 impact fee study, updated to reflect actual costs.

(4) Source: Village of Menomonee Falls Fire Department.

Table 25 - Allocation of Fire Impact Fee Costs to Land Use Categories

Land Use Category	Incremental Development 2010 - 2035	Average Value / Unit	Total Value of Forecast Improvements	Total Incremental Value	Percent of Total Incremental Value	Allocated Share of Future Growth Costs
Residential Dwelling Units ⁽¹⁾	1,987	\$276,633	\$549,542,583		70.3%	\$1,999,457
Industrial (Square Foot) ⁽²⁾⁽³⁾	1,142,562	\$80	\$91,404,958		11.7%	\$332,568
Commercial / Institutional (Square Foot) ⁽²⁾⁽³⁾	1,225,564	\$115	\$140,939,887		18.0%	\$512,796
Total			\$781,887,427		100.0%	\$2,844,821

Notes:

(1) Average value based on a weighted average of new housing construction in the Village of Menomonee Falls between January 1, 2010 and October 2014, from U.S. Census Bureau (see Table 3).

(2) Square feet of new building area constructed is forecast by assuming an increase in nonresidential developed acres in proportion to forecast population and household growth for 2010-2035 (approx. 13%), deducting 25% for right-of-way and other undevelopable land, and applying an assumed Floor Area Ratio of 0.23.

(3) Excluding land, average value per square foot based on 2009 RS Means cost estimates.

The calculation of the proposed fire facilities impact fees is shown in Table 26. Based on the projected population increase of 3,437 residents between 2010 and 2035, impact fee eligible costs allocated to residential development amount to \$582 per capita. The proposed fees per dwelling unit for three categories of residential units were calculated based on the costs of fire facilities per capita and estimated persons per unit. The recommended impact fee per single family home is \$1,547, while the recommended fees per two-bedroom unit and one-bedroom or studio multi-family units are \$1,163 and \$727, respectively.

The costs allocated to industrial development and commercial/institutional development were divided by the forecast square feet of new building construction to arrive at proposed fees of \$0.29 per square foot for industrial development and \$0.42 per square foot for commercial/institutional development. These fees reflect the generally higher value per square foot of commercial buildings as compared to industrial buildings.

Table 26 - Calculation of Fire Facilities Impact Fee

Development Type	Impact Fee Allocation	Incremental Development: 2010 - 2035		Proposed Fee	Units
		3,437	\$582 per capita		
Residential	\$1,999,457	3,437	\$582	per capita	
Industrial	\$332,568	1,142,562	\$0.29	per square foot	
Commercial / Institutional	\$512,796	1,225,564	\$0.42	per square foot	
Residential Fees per Dwelling Unit ⁽¹⁾		Total			
Three-Bedroom Unit or Single-Family Home ⁽²⁾		\$1,547			
Two-Bedroom Unit ⁽³⁾		\$1,163			
Studio and One-Bedroom Apartment ⁽⁴⁾		\$727			

Notes:

(1) Average persons per unit are estimated based on data from the U.S. Census Bureau 2008-2012 Community Survey. Average persons per household for owner-occupied housing in the Village was 2.66; average persons per household for renter-occupied housing was 1.62.

(2) 2.66 persons per unit.

(3) 2.00 persons per unit.

(4) 1.25 persons per unit.

INTRODUCTION

The purpose of this study was to analyze and update the impact fees for parks, water supply, sanitary sewer and fire protection facilities for the Village of Menomonee Falls. The report fulfills the public facilities needs assessment procedural requirement under Wisconsin Statutes §66.0617.

In order to determine the appropriate amount of the fees, the following analysis was performed:

- An inventory was conducted of existing facilities in the Village.
- Forecasts were made regarding future conditions in the Village.
- Service level standards for each type of facility were determined.
- Costs of recommended projects were allocated to the proportionate share of facilities that are needed to serve new development during the planning period.
- Fees were calculated based on the analysis in the previous steps.

RECOMMENDED IMPACT FEE SCHEDULE

Based on the analyses described above, this study recommends that the Village revise its impact fee ordinance and impose impact fees as shown in Table 27.

These amounts recommend the maximum amount that the Village could impose, based on the application of Wisconsin Statutes 66.0617. The Village may choose to impose lesser amounts as a matter of policy. Wisconsin Statutes allow, but do not require, municipalities to designate different impact fees for specific areas in the municipality based on differences in the facilities needed to serve those areas. In the case of the Village of Menomonee Falls, the Village has, in the past, imposed the same fees on all areas of the Village.

Table 27 - Summary of Proposed Impact Fees

	Parks	Water	Sewer	Fire	Total
Three-Bedroom Unit or Single-Family Home	\$2,136	\$2,706	\$2,520	\$1,547	\$8,909
Two-Bedroom Unit	\$1,606	\$2,706	\$2,520	\$1,163	\$7,995
Studio and One-Bedroom Apartment	\$1,004	\$2,706	\$2,520	\$727	\$6,957
Industrial ⁽¹⁾	N/A	\$2,706	\$2,520	\$0.29	
Commercial / Institutional ⁽¹⁾	N/A	\$2,706	\$2,520	\$0.42	

Notes:

(1) Water and sewer fees are imposed per Residential Equivalent Connection (REC) - nonresidential development may be charged multiple RECs depending on the anticipated amount of water/sewer use. The fire impact fee for nonresidential development is per square foot of developed building area.

IMPACT ON THE AVAILABILITY OF AFFORDABLE HOUSING

One of the requirements of Wisconsin Statute §66.0617 is to estimate the cumulative effect of all proposed and existing impact fees on the availability of affordable housing within the municipality. Table 28 summarizes various income and housing characteristics within the Village. Section 1 of the table shows the total annual household income, 30 percent of that level, which represents a guideline for maximum annual affordable housing costs, and the monthly income available for housing costs, for the median household income (MHI) and several ranges of income below the MHI. Section 2 calculates the maximum price that households at each income level would be able to afford when purchasing a home, assuming there is a down payment of 10 percent. Section 3 shows the same calculation, including the total impact fees in the cost of the home. As the table shows, the monthly mortgage payment would be approximately \$44 higher with the proposed impact fees as compared to no impact fees, which represents about 0.7 percent of the median household income in the Village but a larger percent for households with less than the median household income.

Section 4 summarizes the statistics on housing value within the Village. The table shows that just over 30 percent of housing stock in the Village was valued at less than \$200,000. According to Section 3, even with impact fees, a household earning 62 percent of median household income could afford at least 30 percent of the homes in the Village, and those earning 42 percent of median household income could afford approximately 8 percent of the housing stock. Assuming no more than 30 percent of income is spent on housing, and assuming that the rental prices as shown in Section 5 would be similarly affected by impact fees, households with 62 percent of median household income would be able to afford between 34 and 65 percent of all rental units in the Village. Depending on the breakdown within the category, those households earning 42 percent of median household income could afford between 5 and 34 percent of rental units in the Village.

Village of Menomonee Falls Impact Fee Update Chapter 7: Recommended Fees and Implementation

Table 28 - Impact of Cumulative Impact Fees on the Availability of Affordable Housing

	Annual Income	30% of MHI ⁽²⁾	Monthly Income for Housing	
			Total Mortgage Amount	Mortgage Payment ⁽³⁾
1. Income Statistics				
2010 Median Household Income ⁽¹⁾	\$71,292	\$21,388	\$1,782	
80% of Median Household Income	\$57,034	\$17,110	\$1,426	
60% of Median Household Income	\$42,775	\$12,833	\$1,069	
40% of Median Household Income	\$28,517	\$8,555	\$713	
2. Housing Costs				
100% of Median Household Income	\$328,780	\$1,782	\$365,311	
80% of Median Household Income	\$263,024	\$1,426	\$292,249	
60% of Median Household Income	\$197,268	\$1,069	\$219,187	
40% of Median Household Income	\$131,512	\$713	\$146,124	
3. Housing Costs with Impact Fees ⁽⁴⁾				
100% of Median Household Income	\$374,220	\$336,798	\$1,826	\$73,031 102%
80% of Median Household Income	\$301,158	\$271,042	\$1,469	\$58,772 82%
60% of Median Household Income	\$228,096	\$205,286	\$1,113	\$44,514 62%
40% of Median Household Income	\$155,033	\$139,530	\$756	\$30,255 42%
4. Housing Value Statistics (Single-Family) ⁽¹⁾	Units	% of Total		
Up to \$50,000	212	1.9%		
\$50,000 - \$99,999	127	1.1%		
\$100,000 - \$149,999	539	4.9%		
\$150,000 - \$199,999	2,544	23.0%		
\$200,000 - \$299,999	4,659	42.1%		
\$300,000 - \$499,999	2,418	21.9%		
\$500,000 - \$999,999	501	4.5%		
\$1,000,000 or more	60	0.5%		
	11,060			
Median Home Value	\$233,700			
5. Gross Monthly Rent Statistics ⁽¹⁾	Units	% of Total		
Up to \$200	-	0.0%		
\$200 - \$299	56	1.6%		
\$300 - \$499	130	3.7%		
\$500 - \$749	1,013	28.4%		
\$750 - \$999	1,122	31.5%		
\$1,000 - \$1,499	1,001	28.1%		
\$1,500 or more	239	6.7%		
	3,561			

(1) Source: United States Census Bureau, American Community Survey 2008-2012.

(2) Based on standard rule-of-thumb for maximum amount of income to be spent on housing costs in order to be considered affordable.

(3) Based on a 30-year mortgage with an interest rate of 5 percent.

(4) Proposed fees per single-family unit.

ENACTING THE IMPACT FEE ORDINANCE

Prior to amending a local ordinance to impose impact fees on new development, a municipality must comply with the following procedural requirements:

1. Prepare a needs assessment for the public facilities for which it is anticipated that impact fees may be imposed. The public facilities needs assessment shall include the following:
 - a. An inventory of existing public facilities, including identification of any existing deficiencies in those public facilities, for which it is anticipated that an impact fee may be imposed.
 - b. An identification of new, improved or expanded public facilities that will be required because of new development, or the identification of excess capacity in existing public facilities that are used by new development. This shall be based upon an explicit level of service and standards.
 - c. A detailed estimate of the capital costs of providing or constructing the new, improved or expanded public facilities, including an estimate of the cumulative effect of all proposed and existing impact fees on the availability of affordable housing within the municipality.
2. Hold a public hearing prior to enacting or amending an ordinance to impose impact fees. The public facilities needs assessment must be available for public review for at least 20 days before the date of the hearing.

In order to implement the recommendations contained in this report and amend the impact fees for public facilities in the Village of Menomonee Falls, the following remaining steps must be taken:

- Present the findings of this report to the Village Board.
- Revise the existing impact fee ordinance to include the recommended changes to the impact fees.
- Publish a Class 1 notice in the Village newspaper prior to the public hearing as required under Wisconsin Statutes §66.0617(3). The needs assessment must be available for public inspection and copying at least 20 days prior to the public hearing as required under Wisconsin Statutes §66.0617(4)(b).
- Conduct a public hearing prior to amending the impact fee ordinance.
- After the public hearing, the Village Board may adopt the amended impact fee ordinance as recommended or adopt it with additional amendments.

IMPOSITION AND COLLECTION OF FEES

Impact fees may be imposed on persons developing land, where development is defined as the creation of additional residential dwelling units or nonresidential uses that create the need for new, expanded or

improved public facilities. In other words, development can mean the construction of a new residential or nonresidential building, or the expansion or remodeling of an existing residential or nonresidential building that results in a use that requires a higher demand for public services than the previous use.

The impact fees collected must be reduced to compensate for other capital costs imposed by the municipality to provide or pay for public facilities due to new land development. For example, if a developer is required to contribute land, facilities or other items of value to provide a facility that a municipality would otherwise fund with impact fees, then the impact fee charged to the developer must be reduced proportionately.

MANAGING IMPACT FEES

Impact fees must be placed into segregated accounts, meaning each type of fee has its own account. The impact fees and any interest earned on the account balance must be expended only for the facilities for which the fees have been imposed. Impact fees may be used to pay directly for project costs or may be used to pay for the debt service on bonds issued to finance a capital project.

In order to ensure that impact fees are not used to pay for more than the proportionate share of capital costs for facilities needed to serve new development, the public facilities needs assessment should be referenced when determining the amount of impact fee revenues to apply to facility funding. If a project is modified from what is detailed in the needs assessment, it may be necessary to review and update the needs assessment and impact fee ordinance.

Park impact fee revenues may be applied to the projects listed in Table 9 or substitute projects that serve a similar purpose. Water impact fee revenues may be applied to the projects listed in Tables 11-14 or substitute projects that serve a similar purpose. Sewer impact fee revenues may be applied to the projects listed in Table 17 or substitute projects that serve a similar purpose. Fire impact fee revenues may be applied to projects listed in Table 24 or substitute projects that serve a similar purpose.

Impact fees that are collected but are not used within a reasonable period of time after collection must be refunded to the property owner at the time of refund for which the impact fee was imposed. The current time limits are as follows:

1. Impact fees collected prior to December 31, 2002, must have been spent by December 31, 2012.
2. Impact fees collected from January 1, 2003, through April 10, 2006, must be spent by the first day of the 120th month beginning after the date on which they were collected.
3. Impact fees collected after April 10, 2006, but within seven years of the effective date of the ordinance imposing the fees must be spent within 10 years of the effective date of the ordinance.
4. Impact fees collected after April 10, 2006, and more than seven years after the effective date of the ordinance imposing the fees must be spent within a reasonable period of time.
5. A municipality may adopt a resolution that would extend the time period an additional three years due to extenuating circumstances or hardship.

Once the Village adopts an ordinance amending the impact fees, the time limits for expending fees collected after the effective date of the amendment would be governed by that date.

It is recommended that the Village continue to take the following steps to ensure that impact fees are expended within the statutory time limits and that fees are properly applied to the projects shown in the public facilities needs assessment:

- Maintain a spreadsheet or other list of the amounts collected, showing the date paid, tax key, property owner, number of units, fee per unit, and total amount paid for each type of fee.
- Maintain a spreadsheet showing the projects funded through impact fees, by type of fee. At a minimum, it should show the year of the project, a brief description, total cost (including construction and legal, engineering, etc), the amount cash-financed from impact fees, the amount borrowed, a debt service schedule and the share of debt service to be paid from impact fees. Ideally, this spreadsheet would also be linked to a sheet showing the balance of impact fee funds by account, showing payments made from each impact fee fund for cash financing and debt service payments.

PERIODIC REVIEW

It is further recommended that the Village increase the amount of the fees each year by an inflationary factor to make the fees more inter-generationally equitable, in that the amount of the fee paid by any new development is approximately equal to the amount paid in any other year, adjusted for inflation. The impact fees calculated in this report were based on numerous assumptions and forecasts in future development and service levels provided by the Village. The exact specifications of public facilities' design and costs may vary from the estimates developed through the analysis of this report. Therefore, it is recommended that the impact fees be reviewed on a consistent basis to adjust for changes in inflation, development trends or major changes in project plans, ideally on a schedule of every three to five years.

Amendment No. 1

Public Facilities Needs Assessment

and Impact Fee Update

Prepared for the
Village of Menomonee Falls

by Trilogy Consulting, LLC
September 22, 2017



TRILOGY
CONSULTING, LLC
MUNICIPAL & UTILITY ADVISORS

INTRODUCTION

In 2014, Trilogy Consulting prepared the Public Facilities Needs Assessment and Impact Fee Study Update, revising the parks, water supply, sanitary sewer and fire stations facilities needs and capital costs to serve new development in the Village of Menomonee Falls through the year 2035, and calculating appropriate and fair impact fees to recover a portion of the costs for those facilities.

Since the 2014 update, the Village has identified additional park, sanitary sewer, and fire facilities needed to serve new development. This amendment adds those facilities to the list of facilities contained in the 2014 study, and identifies the proportionate share of the cost related to serving new development for each of the new projects. Other assumptions in the study—forecasts of population and households, land use, and development, estimated project costs for previously identified projects, and the allocation of project costs between the share required to serve new development and the share required to remedy existing deficiencies—were not updated in this amendment.

Together with the 2014 study, this amendment satisfies the requirements of Wisconsin State Statute §66.0617, properly allocates the capital costs for the facilities between existing development and new development, and may be used by the Village as the basis for imposing impact fees and using impact fee revenues to fund the proportionate share of new capital facilities required to serve new development.

The amended tables and analysis are detailed below.

PARK FACILITIES

Inventory of Existing and Planned Facilities

Table 7 - Amended shows the inventory of parkland as of 2000, as well as the planned future parkland acquisitions and development. As of 2000, the Village owned and maintained approximately 1,291.8 acres of total parkland, of which 1,256.1 was developed. Planned parkland through 2035 includes approximately 1,501.5 acres, of which 1,384.5 acres will be developed. This was amended from the 2014 study to include the acquisition and development of a 0.35-acre expansion to Mill Pond Park for the development of additional parking space.

**Village of Menomonee Falls Impact Fee Update
Amendment No. 1**

Table 7 - Existing and Planned Acres of Parkland - AMENDED

Park Classification	2000 Existing	New /	Planned 2035		Total Developed / Undeveloped Parkland (acres)	Planned 2035 Developed Parkland
	2000 Existing Land (acres) (1)	Developed Parks (acres) (1)	Planned Acquisition (acres) (2)	New / Planned Development (acres) (2)		
Mini-Park						
Centennial Plaza	0.20	0.20			0.20	0.20
John Taylor Park	0.80	0.80			0.80	0.80
River Road Park			1.50	1.50	1.50	1.50
Subtotal	1.00	1.00	1.50	1.50	2.50	2.50
Neighborhood Park						
Kiwanis Park	3.30	3.30			3.30	3.30
Municipal Park	1.50	1.50			1.50	1.50
Subtotal	4.80	4.80	0.00	0.00	4.80	4.80
Community Park						
Oakwood Park	22.00		38.00	60.00	60.00	60.00
Riverside Park	18.00	18.00			18.00	18.00
Rotary Park	21.10	21.10	2.14	2.14	23.24	23.24
Village Park	18.00	18.00			18.00	18.00
Willowood Park	26.50	26.50			26.50	26.50
Willowood Community Forest Preserve	141.10	141.10			141.10	141.10
SW Community Park			47.26	47.26	47.26	47.26
NW Community Park			117.00		117.00	0.00
Subtotal	246.70	224.70	204.40	109.40	451.10	334.10
Special Purpose Park						
Mill Pond Park	1.70	1.70	0.35	0.35	2.05	2.05
Mill Pond Plaza	0.50	0.50			0.50	0.50
Old Falls Village Park	18.80	18.80			18.80	18.80
Pedestrian Bridge Park			3.00	3.00	3.00	3.00
Subtotal	21.00	21.00	3.35	3.35	24.35	24.35
Urban Green Space						
Lime Kiln Park	19.40	19.40			19.40	19.40
Maple Road Park	13.20			13.20	13.20	13.20
Menomonee River Pkwy	37.50	37.50			37.50	37.50
Rivers Edge Park	15.80	15.80			15.80	15.80
Tower Hill Park	22.40	22.40			22.40	22.40
Tamarack Preserve	910.00	910.00			910.00	910.00
Subtotal	1018.30	1005.10	0.00	13.20	1018.30	1018.30
Total Park Acreage	1291.80	1256.60	209.25	127.45	1501.05	1384.05
Recreational Trails (miles)						
Menomonee River Trail	3.00	3.00			3.00	3.00
Tamarack Trail	2.00	2.00			2.00	2.00
Pershing Avenue Trail			1.20	1.20	1.20	1.20
Rivers Edge / Rotary Park Trail			1.00	1.00	1.00	1.00
Bugline Trail Connection			0.20	0.20	0.20	0.20
Total Trail Mileage	5.00	5.00	2.40	2.40	7.40	7.40

Notes:

(1) Information regarding existing acres of parkland and developed parks is from the 2011-2015 Comprehensive Outdoor Recreation Plan.

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Service Level Standards and Deficiency/Growth Analysis

The amended service level standards and amounts of parkland and miles of trails needed to address existing deficiencies are shown in Table 8 - Amended. The future service level standard is the parkland the Village desires for its residents in terms of acres per 1,000 residents. Standards are calculated separately for each type of park and for parkland acquisition as distinct from parkland development, since the plans include some parks that will be acquired but not developed as well as some existing parkland that will be developed in the future. The 0.35-acre addition to Mill Pond Park was included in the calculation of standards for Special Purpose Parks. When these amended standards are applied to the 2000 population and compared to existing acres of parks as of 2000, the Village had deficiencies in mini parks, community parks and trail miles. Therefore, a proportionate share of the new parks planned in each of these categories was allocated to existing deficiencies and may not be charged to new development in the form of impact fees.

Table 8 - Village-Owned Parks and Trails Service Level Standards and Deficiency/Growth Analysis - AMENDED

Park Type	Service Level			2000						Deficiency %	
	Desired Park Land (Acres)	2035 Forecast Population	Standard (Acres or Miles/1,000 Residents)	Minimum			2000 Existing Parks (acres)	Surplus / (Deficiency)	New Parks (acres)		
				2000 Population	Acres Required	2000 Existing Parks (acres)					
Mini-Park	2.50	39,063	0.06	32,647	2.00	1.00	(1.00)	1.50	33%	67%	
Neighborhood Park - Acquired	4.80	39,063	0.12	32,647	3.90	4.80	0.90	0.00	100%	0%	
Neighborhood Park - Developed	4.80	39,063	0.12	32,647	3.90	4.80	0.90	0.00	100%	0%	
Community Park - Acquired	451.10	39,063	11.55	32,647	377.10	246.70	(130.40)	204.40	36%	64%	
Community Park - Developed	334.10	39,063	8.55	32,647	279.10	224.70	(54.40)	109.40	50%	50%	
Special Purpose Park - Acquired	24.35	39,063	0.62	32,647	20.20	21.00	0.80	3.35	100%	0%	
Special Purpose Park - Developed	24.35	39,063	0.62	32,647	20.20	21.00	0.80	3.35	100%	0%	
Urban Green Space - Acquired	1018.30	39,063	26.07	32,647	851.10	1,018.30	167.20	0.00	100%	0%	
Urban Green Space - Developed	1018.30	39,063	26.07	32,647	851.10	1,005.10	154.00	13.20	100%	0%	
Linear Park - Recreational Trails (miles)	7.40	39,063	0.19	32,647	6.20	5.00	(1.20)	2.40	50%	50%	

Allocation of Costs and Park Impact Fee Calculation

A detailed list of completed and planned park facilities improvements and actual or estimated capital costs is shown in Table 9 - Amended. The list of projects included in the 2014 impact fee update was amended to include costs for the expansion of Mill Pond Park. No other project costs were updated.

Project costs were allocated between the share of costs needed to serve future growth and development and costs needed to remedy existing deficiencies based on the percentages shown in Table 8 – Amended for each type of park and each project type (land acquisition, park development, and recreational trails).

Of the total of \$10.3 million of completed and planned projects, approximately 57 percent, or \$5.8 million, is allocated to future growth and therefore eligible for recovery through impact fees. The remaining 43 percent, or \$4.5 million, is attributable to existing deficiencies and must be funded by other sources. As the Village carries out these projects, the size, location, configuration, or estimated costs may vary from this plan. However, the amount of impact fee revenues used to finance the projects should be based on the percentages shown in Table 9 - Amended.

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Amendment No. 1**

Table 9 - Planned Park Improvements, Estimated or Actual Costs and Allocation of Costs - AMENDED

	Park Type	Total Cost	Future		Future Growth Share of Costs	Deficiency Share of Costs
			Growth %	Deficiency %		
Completed Projects ⁽¹⁾						
Land Acquisition						
Oakwood Park	Community	\$430,000	36%	64%	\$154,800	\$275,200
River Road Park	Neighborhood	\$113,649	100%	0%	\$113,649	\$0
NW Community Park	Community	\$2,047,500	36%	64%	\$737,100	\$1,310,400
SW Community Park	Community	\$0	36%	64%	\$0	\$0
Park Development						
Oakwood Park	Community	\$2,291,459	50%	50%	\$1,145,730	\$1,145,730
Planned Projects ⁽²⁾						
Land Acquisition						
Pedestrian Bridge Park	Special Purpose	\$271,389	100%	0%	\$271,389	\$0
Rotary Park Expansion	Community	\$345,100	36%	64%	\$124,236	\$220,864
Mill Pond Park Expansion ⁽¹⁾	Special Purpose	\$180,875	100%	0%	\$180,875	\$0
Park Development						
River Road Park	Mini	\$379,945	33%	67%	\$125,382	\$254,563
NW Community Park Design ⁽¹⁾	Community	\$40,000	50%	50%	\$20,000	\$20,000
SW Community Park Design ⁽¹⁾	Community	\$50,000	50%	50%	\$25,000	\$25,000
SW Community Park Development	Community	\$1,655,474	50%	50%	\$827,737	\$827,737
Pedestrian Bridge Park	Special Purpose	\$113,983	100%	0%	\$113,983	\$0
Maple Road Park	Urban Green Space	\$1,085,557	100%	0%	\$1,085,557	\$0
Rotary Park Expansion	Community	\$401,450	50%	50%	\$200,725	\$200,725
Mill Pond Park Expansion/Parking Lot ⁽¹⁾	Special Purpose	\$495,351	100%	0%	\$495,351	\$0
Recreational Trails						
Pershing Avenue	Linear Park	\$162,834	50%	50%	\$81,417	\$81,417
Rivers Edge Park	Linear Park	\$135,695	50%	50%	\$67,847	\$67,847
Bugline Trail Connection ⁽¹⁾	Linear Park	\$115,000	50%	50%	\$57,500	\$57,500
Subtotal Land Acquisition Costs		\$3,388,513	47%	53%	\$1,582,049	\$1,806,464
Subtotal Parkland Development Costs		\$6,513,219	62%	38%	\$4,039,464	\$2,473,755
Subtotal Recreational Trail Costs		\$413,528	50%	50%	\$206,764	\$206,764
Total Costs		\$10,315,260	57%	43%	\$5,828,278	\$4,486,983

Notes:

(1) Actual or estimated costs provided by Village staff.

(2) Except as otherwise noted, estimated costs for future projects are taken from the 2011 Impact Fee Study, adjusted for inflation using the Engineering News Record 20-City Construction Cost Index.

The calculation of the proposed park facilities impact fee is shown in Table 10. Based on the projected population increase of 6,416 residents between 2000 and 2035, impact fee eligible costs amount to \$908 per capita. The fees per dwelling unit for three categories of residential units were calculated based on the costs of park facilities per capita and estimated persons per unit. The calculated impact fee per single family home is \$2,415, while the calculated fees per two-bedroom unit and one-bedroom or studio multi-family units are \$1,816 and \$1,135, respectively.

Table 10 - Park Impact Fee Calculation - AMENDED

<u>Impact Fee Costs per Capita</u>	
Total Impact Fee Eligible Costs	\$5,828,278
2000 - 2035 Population Increase	6,416
Impact Fee Costs per Capita	\$908.00
<u>Proposed Impact Fee Schedule ⁽¹⁾</u>	
Impact Fee per Three-Bedroom Unit or Single Family Home ⁽²⁾	\$2,415
Impact Fee per Two-Bedroom Unit ⁽³⁾	\$1,816
Impact Fee per Studio or One-Bedroom Unit ⁽⁴⁾	\$1,135

Notes:

(1) Average persons per unit are estimated based on data from the U.S. Census Bureau 2008-2012 Community Survey. Average persons per household for owner-occupied housing in the Village was 2.66; average persons per household for renter-occupied housing was 1.62.

(2) 2.66 persons per unit.

(3) 2.00 persons per unit.

(4) 1.25 persons per unit.

SANITARY SEWER FACILITIES

Sanitary Sewer Facilities and Cost Allocation

Table 17 – Amended shows the actual costs of completed projects and estimated costs for planned projects that have not yet been completed. The list of proposed facilities was amended to include estimated costs for a new sewer extension to serve an area on the north side of the Village that is currently served by the Village of Germantown.

The Crossroads Shopping Center and Bancroft Drive sewer extension is attributable entirely to serving new development. The land that will be served by this extension is not currently connected to the Menomonee Falls sanitary sewer system. In addition, this extension and the transfer of customers from the Germantown system to the Menomonee Falls system is necessary in order free up capacity in the Germantown system to allow it to provide service to an undeveloped area in Menomonee Falls, directly west of the Crossroads Shopping Center, which would be very costly for Menomonee Falls to serve.

As shown, of the total amended project costs of \$29.9 million, approximately \$14.2 million is attributable to the need to serve future development and may be recovered through impact fees. Based on the recoverable costs and the projected increase of 5,180 RECs between 2000 and 2035, the proposed sewer impact fee per REC is \$2,737.

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Table 17 - Allocation of Sanitary Sewerage Project Costs - AMENDED

Project Description	Project ID	Special		Future Growth %	Future Growth Cost	Developer Contribution	Net Future Growth Cost
		Total Capital Cost	Assessment / TIF Share				
Completed Projects ⁽¹⁾							
Trunk Sewer 1	s-2	\$67,658	\$0	51.9%	\$35,115		\$35,115
Section 12 Interceptor	s-20	\$53,967	\$0	94.3%	\$50,891	\$53,967	\$0
Tamarack Trail Interceptor	s-21	\$191,018	\$0	94.4%	\$180,321	\$191,018	\$0
Hale Ave Interceptor	s-22	\$185,500	\$0	100.0%	\$185,500		\$185,500
Section 23 Interceptor	s-23	\$226,748	\$0	94.3%	\$213,823	\$200,148	\$13,675
Sussex WTF	s-24	\$1,913,426	\$521,791	61.1%	\$850,289		\$850,289
Lannon Interceptor	s-25	\$324,100	\$256,396	67,704	88.9%	\$60,189	\$60,189
Lannon Interceptor Pump Station	s-26	\$837,200	\$662,309	\$174,891	61.1%	\$106,858	\$106,858
Silver Spring Interceptor	s-27	\$6,594,100	\$4,594,200	\$1,999,900	88.9%	\$1,777,911	\$1,777,911
Silver Spring Interceptor Pump Station	s-28	\$516,200	\$336,300	\$179,900	61.1%	\$109,919	\$109,919
Brookfield WTF and Riverview Interceptor	s-29	\$886,867	\$0	\$886,867	13.5%	\$119,727	\$119,727
Section 12 Interceptor	s-30	\$253,463	\$253,463	\$0	94.3%	\$0	\$0
Tamarack Trail Interceptor	s-31	\$1,266,847	\$817,091	\$449,756	94.4%	\$424,570	\$424,570
Section 1 Interceptor	s-32	\$1,129,000	\$1,129,000	\$0	94.4%	\$0	\$0
Section 25 Interceptor	s-33	\$283,300	\$0	\$283,300	94.4%	\$267,435	\$267,435
Appleton Ave and 124th St	s-34	\$708,934	\$663,981	\$44,953	75.0%	\$33,715	\$33,715
Trunk Sewer 5	s-4	\$892,243	\$0	\$892,243	15.2%	\$135,621	\$135,621
Trunk Sewer 17	s-10	\$161,602	\$0	\$161,602	17.3%	\$27,957	\$27,957
Trunk Sewer 18	s-11	\$199,546	\$0	\$199,546	21.1%	\$42,104	\$42,104
Trunk Sewer 19	s-12	\$955,726	\$0	\$955,726	24.5%	\$234,153	\$234,153
Trunk Sewers 22 and 23	s-13	\$604,638	\$0	\$604,638	0.0%	\$0	\$0
Trunk Sewers 6a and 6b	s-5	\$3,383,669	\$0	\$3,383,669	79.3%	\$2,683,250	\$2,683,250
Sussex WTF Expansion	s-19	\$1,877,778	\$0	\$1,877,778	85.2%	\$1,599,867	\$1,599,867
Section 31 Sewers	s-15	\$3,422,749	\$416,751	\$3,005,998	84.8%	\$2,549,086	\$2,549,086
Basin 10 Interceptor	s-35	\$179,288	\$14,196	\$165,092	88.9%	\$146,767	\$146,767
Projects Yet to be Completed ⁽²⁾							
Sewer from Menomonee River Pkwy to Main St	Main St	\$880,387	\$0	\$880,387	100.0%	\$880,387	\$880,387
Trunk 14 Sanitary Sewer - El Rio Drive	Main St	\$770,745	\$0	\$770,745	100.0%	\$770,745	\$770,745
Crossroad Shopping Center & Bancroft Drive ⁽³⁾	Bancroft	\$1,123,828	\$0	\$1,123,828	100.0%	\$1,123,828	\$1,123,828
Total		\$29,890,527	\$9,665,479	\$20,225,048	72.2%	\$14,610,026	\$445,133
							\$14,178,667

Notes:

(1) Actual costs, special assessments and developer contributions provided by Village staff.

(2) Estimated costs taken from the 2011 impact fee study, updated for inflation using the Engineering News Record 20-City Construction Cost Index.

(3) Estimated costs provided by Village staff.

Table 18 - Sewer Impact Fee Calculation - AMENDED

Impact Fee Eligible Costs	\$14,178,667
Projected Number of RECs between 2000 and 2035	
	5,180
Impact Fee per REC	
	\$2,737

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FIRE FACILITIES

Service Level Standards and Deficiency/Growth Analysis

The list of proposed fire facilities, service level standards, and analysis of the proportionate share of facilities required to serve new development was amended to include a portion of the service and wash bays at the Village's new public works facility. These facilities were included in the fire facilities needs assessment and impact fee because the facilities were designed specifically for servicing fire equipment.

Table 22 – Amended shows the development of the service level standards for space per on-duty personnel and garage space per vehicle, including the new servicing and wash bay facilities. The new servicing and wash bay facilities were treated as garage space and the service level standard was calculated in terms of square feet per vehicle, since these facilities will be used to service department vehicles. The space needs for service and wash bays shown on Table 22 – Amended represents the approximate amount of space in the new facility attributable to Fire Department needs. A detailed allocation of space needs for fire equipment is shown in Table 22a. The 5,007 square feet of facility space will provide a service level standard of 124 square feet of administrative space (office and storage space) per on-duty employee and 116 square feet of service bay space per vehicle based on the forecast number of personnel and vehicles needed to serve development in the Village through 2035. Prior to constructing this facility, the Village did not have a facility for washing and servicing fire equipment.

Table 22 - Summary of Existing Facilities and Recommended Future Facilities - AMENDED

<u>Summary of Current Facilities</u>							Total Usable Interior Space (SF)
Location	Admin / Living Quarters (SF)	Personnel per Shift		Garage Space (SF)	No. of Vehicles	SF / Vehicle	
		SF / Person					
Station No. 1	4,728	1	4,728	2,129	4	532	6,857
Station No. 2	1,313	1	1,313	3,972	5	794	5,285
Station No. 3	9,505	9	1,056	4,800	6	800	14,305
Station No. 4	2,952	2	1,476	3,893	7	556	6,845
Total	18,498	13	1,423	14,794	22	672	33,292

<u>Forecast Future Facilities</u>							Total Usable Interior Space (SF)
Location	Admin / Living Quarters (SF)	Personnel per Shift		Garage Space (SF)	No. of Vehicles	SF / Vehicle	
		SF / Person					
Station No. 1 - Renovation / Replacement ⁽¹⁾	5,000	2	2,500	3,200	4	800	8,200
Station No. 2 - Addition	2,513	1	2,513	3,972	5	794	6,485
Station No. 3 - No change	9,505	9	1,056	4,800	6	800	14,305
Station No. 4 - Addition	3,962	2	1,981	3,893	7	556	7,855
Station No. 5 - New Station ⁽¹⁾	5,000	2	2,500	3,200	4	800	8,200
Subtotal	25,980	16	10,550	19,065	26	3,751	45,045
Service and Wash Bays for Fire Equipment at DPW Facility	1,985	16	124	3,022	26	116	5,007

Notes:

(1) Usable interior space estimated based on total gross area of 8,804 square feet, garage space of 3,200 square feet, and assuming approximately 10% of the administrative/living quarters area is "unassigned" space.

**Village of Menomonee Falls Impact Fee Update
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Table 22a - Summary of Service and Wash Bays for Fire Equipment at DPW Facility

	Total Area (SF)	Cost per SF	Total Cost	Percentage	Area	Cost
				Allocated to Fire	Allocated to Fire (SF)	Allocated to Fire
Service Bay #1	1,632	\$165.00	\$269,280	100%	1,632	\$269,280
Oversizing of Other Service Bays	7,802	\$165.00	\$1,287,330	10%	780	\$128,733
Wash Bay	1,648	\$280.00	\$461,440	37%	610	\$170,733
Office / Personnel Area	5,331	\$175.00	\$932,925	15%	800	\$139,939
Mezzanine Storage	7,905	\$95.00	\$750,975	15%	1,186	\$112,646
Subtotal Construction	24,318		\$3,701,950	21%	5,007	\$821,331
Fuel Dispensing and Management Systems			\$281,795	16%		\$45,087
Site Acquisition, Demolition & Abatement			\$815,000	5%		\$40,750
Sitework, Grading & Utilities			\$1,290,796	5%		\$64,540
Site Paving			\$975,543	5%		\$48,777
Subtotal						\$154,067
Total						\$1,020,485

Source: 8/28/2017 email from Village staff. Costs include administration, design, engineering and inspection.

Table 23 - Amended shows the updated analysis of deficiencies in existing facility space, in terms of square feet, and the proportionate shares of new facilities needed to remedy existing deficiencies and serve future development. The service level standards were defined as the approximate total planned amount of administrative/living quarter space per on-duty personnel and the total amount of garage space per vehicle. These standards were then applied to the desired number of on-duty personnel per shift and current number of vehicles as of 2010 to calculate the amount of facility space required in 2010 to provide the same level of service. The required facility space was compared to the actual amount of facility space provided to quantify any deficiencies in facility space, and the percentage of the planned increase in facility space needed to remedy those existing deficiencies versus the percentage of space to serve future development was calculated.

Since the Village did not previously have a facility for washing and servicing fire equipment, most of this space is attributable to serving existing development (existing fire department personnel and equipment). Based on the 2035 service level standards, the existing facility space deficiency for administrative space was 1,613 square feet, or 81 percent, and the deficiency for washing and servicing bays was 2,557 square feet, or 85 percent of the new bays. Therefore, only 19 percent of the administrative space and 15 percent of the service bays can be attributed to the need to serve future development.

**Village of Menomonee Falls Impact Fee Update
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Table 23 - Fire Department Service Level Standards & Deficiency / Growth Analysis - AMENDED

Building Area	2035 Facilities Space (SF)	2035 No. of Staff and Vehicles	2035 Service Level Standard (SF per Employee or Vehicle)	Existing No. of Staff and Vehicles	Required Existing Facilities using 2035 Standards (SF)			Surplus / (Deficiency) (SF)	Growth %	Deficiency %
					Existing Facilities	Existing Facilities (SF)	Surplus / (Deficiency) (SF)			
Admin / Living Quarters	25,980	16	1,624	13	21,109	18,498	(2,611)	65%	35%	
Garage Space	19,065	26	733	22	16,132	14,794	(1,338)	69%	31%	
Admin Space at DPW Service Facility	1,985	16	124	13	1,613	0	(1,613)	19%	81%	
Service/Wash Bays at DPW Facility	3,022	26	116	22	2,557	0	(2,557)	15%	85%	
Combined	50,052				41,411	33,292	(8,119)	52%	48%	

Allocation of Costs and Fire Impact Fee Calculation

Table 24 - Amended shows the actual or estimated capital costs to expand and improve the Village's fire station facilities and the allocation of those costs between the proportionate shares to remedy existing deficiencies and serve future development. This analysis was amended to add the servicing and wash bay facilities. No other costs or allocations were updated.

In total, of the estimated \$8.0 million in improvements, approximately \$3.0 million, or 38%, is attributable to the need to serve future development and may be recovered through impact fees. The remaining \$5.0 million, or 62%, is needed to remedy existing deficiencies and must be funded from other sources.

**Village of Menomonee Falls Impact Fee Update
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Table 24 - Deficiency / Growth Allocation of Costs to Upgrade Fire Department Facilities - AMENDED

Location	Description ⁽⁴⁾	Estimated / Actual Cost	Future Growth %	Deficiency %	Future Growth Share of Costs	Deficiency Share of Costs
Station No. 1 ⁽¹⁾	Replace Existing Space (6,857 sf)	\$2,707,367	0%	100%	\$0	\$2,707,367
	Additional Space (1,387 sf)	\$547,633	69%	31%	\$376,083	\$171,550
	Subtotal Station (8,244 sf)	\$3,255,000	12%	88%	\$376,083	\$2,878,917
Station No. 2 ⁽²⁾	Addition to Station (add living quarters, locker rooms and showers)	\$339,996	65%	35%	\$221,359	\$118,637
Station No. 3	None	\$0	0%	0%	\$0	\$0
Station No. 4 ⁽²⁾	Addition to station (add sleeping quarters)	\$283,330	65%	35%	\$184,466	\$98,865
Station No. 5 ⁽¹⁾⁽³⁾	New station					
	Administrative space	\$2,181,463	65%	35%	\$1,420,269	\$761,194
	Garage space	\$743,537	69%	31%	\$510,618	\$232,918
	Land Acquisition	\$200,000	66%	34%	\$132,026	\$67,974
DPW Facility	Subtotal Station No. 5	\$3,125,000	66%	34%	\$2,062,914	\$1,062,086
	Administrative space	\$299,965	19%	81%	\$56,244	\$243,722
	Fire Equipment Service/Wash Bays	\$720,520	15%	85%	\$110,849	\$609,670
Total		\$8,023,812	38%	62%	\$3,011,914	\$5,011,898

Notes:

- (1) Actual costs provided by Village staff, November 2014.
- (2) Estimated costs are taken from the 2011 impact fee study, inflated using the Engineering News Record 20-City Construction Cost Index.
- (3) Split between costs for garage space versus administrative and living quarter space is based on the estimates used in the 2011 impact fee study, updated to reflect actual costs.
- (4) Source: Village of Menomonee Falls Fire Department.

Since the fire department serves both residential and nonresidential development, the impact fee eligible costs were allocated between residential and nonresidential development. Table 25 – Amended shows the allocation of the updated impact fee share of costs between residential and nonresidential development.

**Village of Menomonee Falls Impact Fee Update
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Table 25 - Allocation of Fire Impact Fee Costs to Land Use Categories - AMENDED

Land Use Category	Incremental Development 2010 - 2035	Average Value / Unit	Total Value of Forecast Improvements	Percent of Total Incremental Value	Allocated Share of Future Growth Costs
Residential Dwelling Units ⁽¹⁾	1,987	\$276,633	\$549,542,583	70.3%	\$2,116,897
Industrial (Square Foot) ⁽²⁾⁽³⁾	1,142,562	\$80	\$91,404,958	11.7%	\$352,102
Commercial / Institutional (Square Foot) ⁽²⁾⁽³⁾	1,225,564	\$115	\$140,939,887	18.0%	\$542,915
Total			\$781,887,427	100.0%	\$3,011,914

Notes:

(1) Average value based on a weighted average of new housing construction in the Village of Menomonee Falls between January 1, 2010 and October 2014, from U.S. Census Bureau (see Table 3).

(2) Square feet of new building area constructed is forecast by assuming an increase in nonresidential developed acres in proportion to forecast population and household growth for 2010-2035 (approx. 13%), deducting 25% for right-of-way and other undevelopable land, and applying an assumed Floor Area Ratio of 0.23.

(3) Excluding land, average value per square foot based on 2009 RS Means cost estimates.

The calculation of the amended fire facilities impact fees is shown in Table 26. Based on the projected population increase of 3,437 residents between 2010 and 2035, impact fee eligible costs allocated to residential development amount to \$616 per capita. The impact fee per single family home is \$1,638, while the fees per two-bedroom unit and one-bedroom or studio multi-family units are \$1,232 and \$770, respectively.

The costs allocated to industrial development and commercial/institutional development were divided by the forecast square feet of new building construction to arrive at fees of \$0.31 per square foot for industrial development and \$0.44 per square foot for commercial/institutional development. These fees reflect the generally higher value per square foot of commercial buildings as compared to industrial buildings.

**Village of Menomonee Falls Impact Fee Update
Amendment No. 1**

Table 26 - Calculation of Fire Facilities Impact Fee - AMENDED

Development Type	Impact Fee Allocation	Incremental Development: 2010 - 2035		Proposed Fee	Units
		2010 - 2035	2010 - 2035		
Residential	\$2,109,801	3,437	3,437	\$614	per capita
Industrial	\$350,922	1,142,562	1,142,562	\$0.31	per square foot
Commercial / Institutional	\$541,096	1,225,564	1,225,564	\$0.44	per square foot
 Residential Fees per Dwelling Unit ⁽¹⁾		Total			
Three-Bedroom Unit or Single-Family Home ⁽²⁾		\$1,633			
Two-Bedroom Unit ⁽³⁾		\$1,228			
Studio and One-Bedroom Apartment ⁽⁴⁾		\$767			

Notes:

(1) Average persons per unit are estimated based on data from the U.S. Census Bureau 2008-2012 Community Survey. Average persons per household for owner-occupied housing in the Village was 2.66; average persons per household for renter-occupied housing was 1.62.
 (2) 2.66 persons per unit.
 (3) 2.00 persons per unit.
 (4) 1.25 persons per unit.

CONCLUSIONS

The intent of this amendment was to revise the list of parks, sanitary sewer, and fire facilities to include additional facilities and improvements identified by the Village since the 2014 impact fee update. This amendment, together with the 2014 impact fee update, provides a basis for the Village to apply impact fees collected under its existing ordinance to the projects listed in this amendment. If actual costs vary from the costs estimated in this amendment, impact fees may be applied to the actual project costs based on the impact fee eligible percentages identified in this amendment.

The Village may also amend its ordinance to increase the amounts of impact fees collected based on the findings of this report. However, since the assumptions used in the 2014 impact fee update were not revised by this amendment, most of the estimated costs included in this report, and therefore the calculated fees, are not in current dollars. In addition, the Village's impact fee ordinance includes a schedule of fees through 2020, with annual inflationary increases to the fees to account for increases in project costs and interest costs. Therefore, it is recommended that the Village update the entire impact fee study before adopting new impact fees.

Amendment No. 2

Public Facilities Needs Assessment

and Impact Fee Update

Prepared for the

Village of Menomonee Falls

by Trilogy Consulting, LLC

March 28, 2018



TRILOGY
CONSULTING, LLC
MUNICIPAL & UTILITY ADVISORS

INTRODUCTION

In 2014, Trilogy Consulting prepared the Public Facilities Needs Assessment and Impact Fee Study Update, revising the parks, water supply, sanitary sewer and fire stations facilities needs and capital costs to serve new development in the Village of Menomonee Falls through the year 2035, and calculating appropriate and fair impact fees to recover a portion of the costs for those facilities.

In 2017, the Impact Fee Study Update was amended to include additional park, sanitary sewer, and fire facilities needed to serve new development. Other assumptions in the study—forecasts of population and households, land use, and development, estimated project costs for previously identified projects, and the allocation of project costs between the share required to serve new development and the share required to remedy existing deficiencies—were not updated as part of Amendment No. 1 in 2017. The Village adopted the amended impact fee study update but did not increase the amount of the impact fees.

Since Amendment No. 1 was adopted in 2017, the Village has updated its population forecast and has identified additional park facilities to serve the expected population of the Village through 2035. This Amendment No. 2 to the 2014 Impact Fee Study Update revises the public facilities needs assessment and impact fee calculations for parks facilities to be consistent with current population projections and plans for increasing the capacity of the Village park system.

Together with the 2014 study update, this amendment satisfies the requirements of Wisconsin State Statute §66.0617, properly allocates the capital costs for the facilities between existing development and new development and may be used by the Village as the basis for imposing impact fees and using impact fee revenues to fund the proportionate share of new capital facilities required to serve new development.

The amended tables and analysis are detailed below.

FORECAST POPULATION AND HOUSEHOLDS

In the 2014 update to the impact fee study, the population forecast was updated to reflect the reduced pace of development between 2008 and 2014. The forecast population for 2035 was 39,063, or an increase of 6,416 between 2000 and 2035. Since 2014, the pace of development in the Village has risen to levels at or above the pre-recession level. The 2035 forecast population for the Village has increased substantially based on the increase in development activity.

Table 2 – Amended shows the population and households in the Village based on data from the 2000 and 2010 U.S. Census and the Census Bureau estimate of January 1, 2013 and January 1, 2017 population. The estimated numbers of households in 2013 and 2017 were developed based on residential building permits issued during 2010-2017. As shown, the annual pace of residential development and population growth from 2010 to 2017 was very similar to the growth rate from 2000 to 2010.

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Amendment No. 2**

Table 2 - Population and Housing, 2000-2017 - AMENDED

Year	Actual / Estimated Population	Actual / Estimated Households	Persons per Household
2000 ⁽¹⁾	32,647	12,844	2.54
2010 ⁽²⁾	35,626	14,567	2.45
2013 ⁽³⁾	35,924	14,758	2.43
2017 ⁽⁴⁾	37,413	15,713	2.38
Annual Growth, 2000-2010	298	172	
Est. Annual Growth, 2010-2017	255	164	

Notes:

(1) 2000 Census

(2) 2010 Census

(3) U.S. Census Bureau population estimate.

(4) Wisconsin Department of Administration population estimate. Households estimate based on number of 2010-2017 building permits, assuming 5% vacancy rate.

Table 5 – Amended shows the actual, estimated and forecast increases in population and households 2000-2010, 2010-2017, and 2017-2035, as well as the forecast total for the entire study period of 2000-2035. The forecast for 2010-2017 is based on the number of building permits issued between 2010 and 2016. The forecast for increases in population and households from 2017 through 2035 relies on the Wisconsin Department of Administration forecast 2035 population and an annual increase in the number of households equal to the average number of new residential units permitted per year for 2010-2017.

Table 5 - Historical and Forecast Population - AMENDED

Time Period	Increase in Population	Increase in Households	Persons per Household, New Households
2000 - 2010 (actual)	2,979	1,723	1.73
2010 - 2017 (estimated) ⁽¹⁾	1,787	1,146	1.56
2017 - 2035 (forecast) ⁽²⁾	4,747	3,060	1.55
Total Increase, 2000-2035	9,513	5,929	1.60

Notes:

(1) Forecast increase in population 2010 and 2017 is based on Wisconsin Department of Administration population estimates. Estimated increase in households between 2010 and 2017 is based on the number of building permits issued during 2010 through 2016, assuming a 5% vacancy rate.

(2) Forecast increase in population is the Wisconsin Department of Administration forecast. Forecast increase in households is based on average number of new residential building permits per year for 2010 through 2017.

PARK FACILITIES

Inventory of Existing and Planned Facilities

Table 7 - Amended shows the inventory of parkland as of 2000, as well as the planned future parkland acquisitions and development. As of 2000, the Village owned and maintained approximately 1,252 acres of total parkland, of which 1,152 was developed. Planned parkland through 2035 includes approximately 1,502 acres, of which 1,255 acres will be developed. This was amended from the 2014 study to include additional parks that the Village acquired and developed without the use of impact fee funds; to reclassify certain parks according to current classifications in the Village of Menomonee Falls Comprehensive Outdoor Recreation Plan, 2016-2020; and to include new planned parks projects, including the acquisition and development of a 0.35-acre expansion to Mill Pond Park for the development of additional parking space, the acquisition of 0.95 acres and the conversion of approximately 3.0 acres of Village Park to a special destination park with an amphitheater, splash pad, farmer's market pavilion, and plaza/event space, expanded facilities at the Old Falls Village Park, and expanded facilities at Village Park.

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Table 7 - Existing and Planned Acres of Parkland - AMENDED

Park Classification	2000 Existing		New / Planned Acquisition (acres) ⁽²⁾	New / Planned Development (acres) ⁽²⁾	Planned 2035	
	2000 Existing Land (acres) ⁽¹⁾	Developed Parks (acres) ⁽¹⁾			Total Developed Parkland (acres)	Developed / Undeveloped Parkland (acres)
Mini-Park						
Centennial Plaza	0.20	0.20			0.20	0.20
John Taylor Park	0.80	0.80			0.80	0.80
Heron Alley			0.10	0.10	0.10	0.10
Richard A. Farrenkopf Plaza			0.50	0.50	0.50	0.50
River Road Park			1.60	1.60	1.60	1.60
Subtotal	1.00	1.00		2.20	2.20	3.20
Neighborhood Park						
Kiwanis Park	3.30	3.30			3.30	3.30
Maple Road Park	13.20				13.20	0.00
Municipal Park	1.50	1.50	8.80		10.30	1.50
Subtotal	18.00	4.80	8.80	0.00	26.80	4.80
Community Park						
Aero Park (SW Community Park)			47.26	47.26	47.26	47.26
NW Community Park			119.90		119.90	0.00
Oakwood Park	22.00		31.60	31.60	53.60	31.60
Riverside Park	10.30	10.30			10.30	10.30
Rotary Park	36.50	36.50	2.14	2.14	38.64	38.64
Village Park	17.10	17.10	(3.00)	(3.00)	14.10	14.10
Willowood Park	26.90	26.90			26.90	26.90
Subtotal	112.80	90.80	197.90	78.00	310.70	168.80
Special Purpose Park						
Mill Pond Park	1.70	1.70	0.35	0.35	2.05	2.05
Mill Pond Plaza	0.50	0.50			0.50	0.50
Old Falls Village Park	17.70	17.70			17.70	17.70
Village Park Special Purpose Park	0.00	0.00	3.95	3.95	3.95	3.95
Subtotal	19.90	19.90	4.30	4.30	24.20	24.20
Urban Green Space / Natural Area						
Lilly Creek Parkway	29.30				29.30	0.00
Lime Kiln Park	19.10	19.10			19.10	19.10
Maple Road Preserve	13.10			13.10	13.10	13.10
Menomonee River Pkwy	55.10	55.10			55.10	55.10
Menomonee River Preserve	0.00		32.30		32.30	0.00
Pedestrian Bridge Park			3.00	3.00	3.00	3.00
Rivers Edge Park	32.10	32.10			32.10	32.10
River Road Park			1.60	1.60	1.60	1.60
Tamarack Preserve	788.40	788.40			788.40	788.40
Tower Hill Park	22.40				22.40	0.00
Willowood Community Forest Preserve	141.10	141.10			141.10	141.10
Subtotal	1100.60	1035.80	36.90	17.70	1137.50	1053.50
Total Park Acreage	1252.30	1152.30	250.10	102.20	1502.40	1254.50
Recreational Trails (miles)						
Menomonee River Trail	3.00	3.00			3.00	3.00
Tamarack Trail	2.00	2.00			2.00	2.00
Pershing Avenue Trail			1.20	1.20	1.20	1.20
Rivers Edge / Rotary Park Trail			1.00	1.00	1.00	1.00
Bugline Trail Connection			0.20	0.20	0.20	0.20
Total Trail Mileage	5.00	5.00	2.40	2.40	7.40	7.40

Notes:

(1) Information regarding existing acres of parkland and developed parks is from the 2016-2020 Comprehensive Outdoor Recreation Plan.

(2) Information regarding new or planned parkland and developed parks is from the 2016-2020 Comprehensive Outdoor Recreation Plan

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Service Level Standards and Deficiency/Growth Analysis

The amended service level standards and amounts of parkland and miles of trails needed to address existing deficiencies are shown in Table 8 - Amended. The future service level standard is the parkland the Village desires for its residents in terms of acres per 1,000 residents. Standards are calculated separately for each type of park and for parkland acquisition as distinct from parkland development, since the plans include some parks that will be acquired but not developed as well as some existing parkland that will be developed in the future. The 0.35-acre addition to Mill Pond Park was included in the calculation of standards for Special Purpose Parks. When these amended standards are applied to the 2000 population and compared to existing acres of parks as of 2000, the Village had deficiencies in mini parks, community parks and trail miles. Therefore, a proportionate share of the new parks planned in each of these categories was allocated to existing deficiencies and may not be charged to new development in the form of impact fees.

Table 8 - Village-Owned Parks and Trails Service Level Standards and Deficiency/Growth Analysis - AMENDED

Park Type	Service Level Standard			2000							Deficiency %	
	Desired Park Land (Acres)	2035 Forecast Population	Miles per 1,000 Residents	2000 Population	Acres Required	Existing Parks (acres)		Surplus / (Deficiency)	New Parks (acres)	Growth %		
						Minimum	Existing					
Mini-Park	3.20	42,160	0.08	32,647	2.60	1.00	(1.60)	2.20	27%	73%		
Neighborhood Park - Acquired	26.80	42,160	0.64	32,647	20.90	18.00	(2.90)	8.80	67%	33%		
Neighborhood Park - Developed	4.80	42,160	0.11	32,647	3.60	4.80	1.20	0.00	100%	0%		
Community Park - Acquired	310.70	42,160	7.37	32,647	240.60	112.80	(127.80)	197.90	35%	65%		
Community Park - Developed	168.80	42,160	4.00	32,647	130.60	90.80	(39.80)	78.00	49%	51%		
Special Purpose Park - Acquired	24.20	42,160	0.57	32,647	18.60	19.90	1.30	4.30	100%	0%		
Special Purpose Park - Developed	24.20	42,160	0.57	32,647	18.60	19.90	1.30	4.30	100%	0%		
Urban Green Space - Acquired	1137.50	42,160	26.98	32,647	880.80	1,100.60	219.80	36.90	100%	0%		
Urban Green Space - Developed	1053.50	42,160	24.99	32,647	815.80	1,035.80	220.00	17.70	100%	0%		
Linear Park - Recreational Trails (miles)	7.40	42,160	0.18	32,647	5.90	5.00	(0.90)	2.40	62%	38%		

Allocation of Costs and Park Impact Fee Calculation

A detailed list of completed and planned park facilities improvements and actual or estimated capital costs is shown in Table 9 - Amended. The list of projects included in the 2014 impact fee update was amended to include costs for the expansion of Mill Pond Park, acquisition and development of the special purpose park area in Village Park and expanded facilities in the remainder of Village Park and in Old Falls Village Park. No other project costs were updated.

Project costs were allocated between the share of costs needed to serve future growth and development and costs needed to remedy existing deficiencies based on the percentages shown in Table 8 – Amended for each type of park and each project type (land acquisition, park development, and recreational trails).

Of the total of \$19.2 million of completed and planned projects, approximately \$18.6 million is for new and expanded facilities. Of this amount, \$13.1 million, or 70 percent, is allocated to future growth and therefore eligible for recovery through impact fees. The remaining 30 percent, or \$5.5 million, is attributable to existing deficiencies and must be funded by other sources. As the Village carries out

Village of Menomonee Falls Impact Fee Update Amendment No. 2

these projects, the size, location, configuration, or estimated costs may vary from this plan. However, the amount of impact fee revenues used to finance the projects should be based on the percentages shown in Table 9 - Amended.

Table 9 - Planned Park Improvements, Estimated or Actual Costs and Allocation of Costs - AMENDED

	Park Type	Total Cost	Replacement / Repair Costs		Future Growth %	Deficiency %	Future Growth Share of Costs	Deficiency Share of Costs
			Net Cost					
Completed Projects ⁽¹⁾								
Land Acquisition								
Aero Park (SW Community Park)	Community	\$0	\$0		36%	64%	\$0	\$0
NW Community Park	Community	\$2,047,500	\$2,047,500		36%	64%	\$737,100	\$1,310,400
Oakwood Park	Community	\$430,000	\$430,000		36%	64%	\$154,800	\$275,200
River Road Park	Urban Green Space	\$113,649	\$113,649		100%	0%	\$113,649	\$0
Park Development								
Oakwood Park	Community	\$2,291,459	\$2,291,459		50%	50%	\$1,145,730	\$1,145,730
Planned Projects ⁽²⁾								
Land Acquisition								
Mill Pond Park Expansion ⁽¹⁾	Special Purpose	\$180,875	\$180,875		100%	0%	\$180,875	\$0
Pedestrian Bridge Park	Urban Green Space	\$271,389	\$271,389		100%	0%	\$271,389	\$0
Rotary Park Expansion	Community	\$345,100	\$345,100		35%	65%	\$120,785	\$224,315
Village Park Special Park ⁽¹⁾	Special Purpose	\$1,500,000	\$1,500,000		100%	0%	\$1,500,000	\$0
Park Development								
Aero Park (SW Community Park) Design ⁽¹⁾	Community	\$50,000	\$50,000		49%	51%	\$24,500	\$25,500
Aero Park (SW Community Park) Development	Community	\$1,655,474	\$1,655,474		49%	51%	\$811,182	\$844,292
Maple Road Preserve	Urban Green Space	\$1,085,557	\$1,085,557		100%	0%	\$1,085,557	\$0
Mill Pond Park Expansion/Parking Lot ⁽¹⁾	Special Purpose	\$495,351	\$495,351		100%	0%	\$495,351	\$0
NW Community Park Design ⁽¹⁾	Community	\$40,000	\$40,000		49%	51%	\$19,600	\$20,400
Old Falls Village Expansion	Special Purpose	\$1,313,565	\$1,313,565		100%	0%	\$1,313,565	\$0
Pedestrian Bridge Park	Urban Green Space	\$113,983	\$113,983		100%	0%	\$113,983	\$0
River Road Park	Mini	\$379,945	\$379,945		27%	73%	\$102,585	\$277,360
Rotary Park Expansion	Community	\$401,450	\$401,450		49%	51%	\$196,711	\$204,740
Village Park ⁽¹⁾⁽³⁾	Community	\$2,644,198	\$672,371	\$1,971,828	49%	51%	\$966,196	\$1,005,632
Village Park Special Park ⁽¹⁾	Special Purpose	\$3,456,701	\$3,456,701		100%	0%	\$3,456,701	\$0
Recreational Trails								
Pershing Avenue	Linear Park	\$162,834	\$162,834		62%	38%	\$100,957	\$61,877
Rivers Edge Park	Linear Park	\$135,695	\$135,695		62%	38%	\$84,131	\$51,564
Bugline Trail Connection ⁽¹⁾	Linear Park	\$115,000	\$115,000		62%	38%	\$71,300	\$43,700
Subtotal Land Acquisition Costs		\$4,888,513	\$0	\$4,888,513	63%	37%	\$3,078,598	\$1,809,915
Subtotal Parkland Development Costs		\$13,927,683	\$672,371	\$13,255,313	70%	25%	\$9,731,660	\$3,523,653
Subtotal Recreational Trail Costs		\$413,528	\$0	\$413,528	62%	38%	\$256,387	\$157,141
Total Costs		\$19,229,725	\$672,371	\$18,557,354	70%	30%	\$13,066,646	\$5,490,708

Notes:

(1) Actual or estimated costs provided by Village staff.

(2) Except as otherwise noted, estimated costs for future projects are taken from the 2011 Impact Fee Study, adjusted for inflation using the Engineering News Record 20-City Construction Cost Index.

(3) Excluded costs include resurfacing of parking lots, tennis court resurfacing, and an estimated replacement cost of \$150,000 for a play structure, plus associated engineering, inspection, construction administration, and contingency costs.

The calculation of the proposed park facilities impact fee is shown in Table 10 - Amended. Based on the projected population increase of 9,513 residents between 2000 and 2035, impact fee eligible costs amount to \$1,374 per capita. The fees per dwelling unit for three categories of residential units were calculated based on the costs of park facilities per capita and estimated persons per unit. The calculated impact fee per single family home is \$3,655, while the calculated fees per two-bedroom unit and one-bedroom or studio multi-family units are \$2,748 and \$1,718, respectively.

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Table 10 - Park Impact Fee Calculation - AMENDED

<u>Impact Fee Costs per Capita</u>	
Total Impact Fee Eligible Costs	\$13,066,646
2000 - 2035 Population Increase	9,513
Impact Fee Costs per Capita	\$1,374.00
<u>Proposed Impact Fee Schedule ⁽¹⁾</u>	
Impact Fee per Three-Bedroom Unit or Single Family Home ⁽²⁾	\$3,655
Impact Fee per Two-Bedroom Unit ⁽³⁾	\$2,748
Impact Fee per Studio or One-Bedroom Unit ⁽⁴⁾	\$1,718

Notes:

(1) Average persons per unit are estimated based on data from the U.S. Census Bureau 2008-2012 Community Survey. Average persons per household for owner-occupied housing in the Village was 2.66; average persons per household for renter-occupied housing was 1.62.

(2) 2.66 persons per unit.

(3) 2.00 persons per unit.

(4) 1.25 persons per unit.

CONCLUSIONS

The intent of this amendment was to revise the list of parks facilities to include additional facilities and improvements identified by the Village since the 2014 impact fee update. This amendment, together with the 2014 impact fee update, provides a basis for the Village to apply impact fees collected under its existing ordinance to the projects listed in this amendment. If actual costs vary from the costs estimated in this amendment, impact fees may be applied to the actual project costs based on the impact fee eligible percentages identified in this amendment.

The Village may also amend its ordinance to increase the amounts of impact fees collected based on the findings of this report. However, since most of the cost estimates used in the 2014 impact fee update were not revised by this amendment, the calculated fees are not in current dollars. In addition, the Village's impact fee ordinance includes a schedule of fees through 2020, with annual inflationary increases to the fees to account for increases in project costs and interest costs. Therefore, it is recommended that the Village update the entire impact fee study before adopting new impact fees.