

**ALTERNATIVE TRANSPORTATION
IMPACT FEES**



**PROCESS,
PROCEDURES,
AND
REQUIREMENTS**

Orange County Alternative Transportation Impact Fees

The Orange County Transportation Impact Fee program allows Orange County to charge new development occurring in the County an impact fee to replace roadway and transportation capacity used by such development. The initial Road Impact Fee Ordinance was adopted in 1985 and took effect in 1986. On February 12, 2013, the Board of County Commissioners approved the latest update as Ordinance No. 2013-05.

Under the provisions in the Impact Fee Ordinance, an applicant wishing to contest the impact fee rates provided in the rate schedule may do so by entering into an Alternative Impact Fee (AIF) agreement with the Board of County Commissioners.

The AIF agreement must be approved by the Impact Fee Committee (IFC) prior to issuance of any building permit and must be approved by the Board of County Commissioners (BCC) prior to issuance of any certificate of occupancy, temporary or permanent.

The following document outlines the process and requirements for AIF agreements. Included are the following items:

Process Flow Chart: The flow chart depicts the steps of the AIF process from the time the applicant submits intent to seek an alternative impact fee to final Board of County Commissioners approval.

General AIF Study Methodology: The typical study methodology is outlined in this section. The methodology presented in this section is only an example of the standard AIF Study methodology and may be slightly altered to accommodate special circumstances.

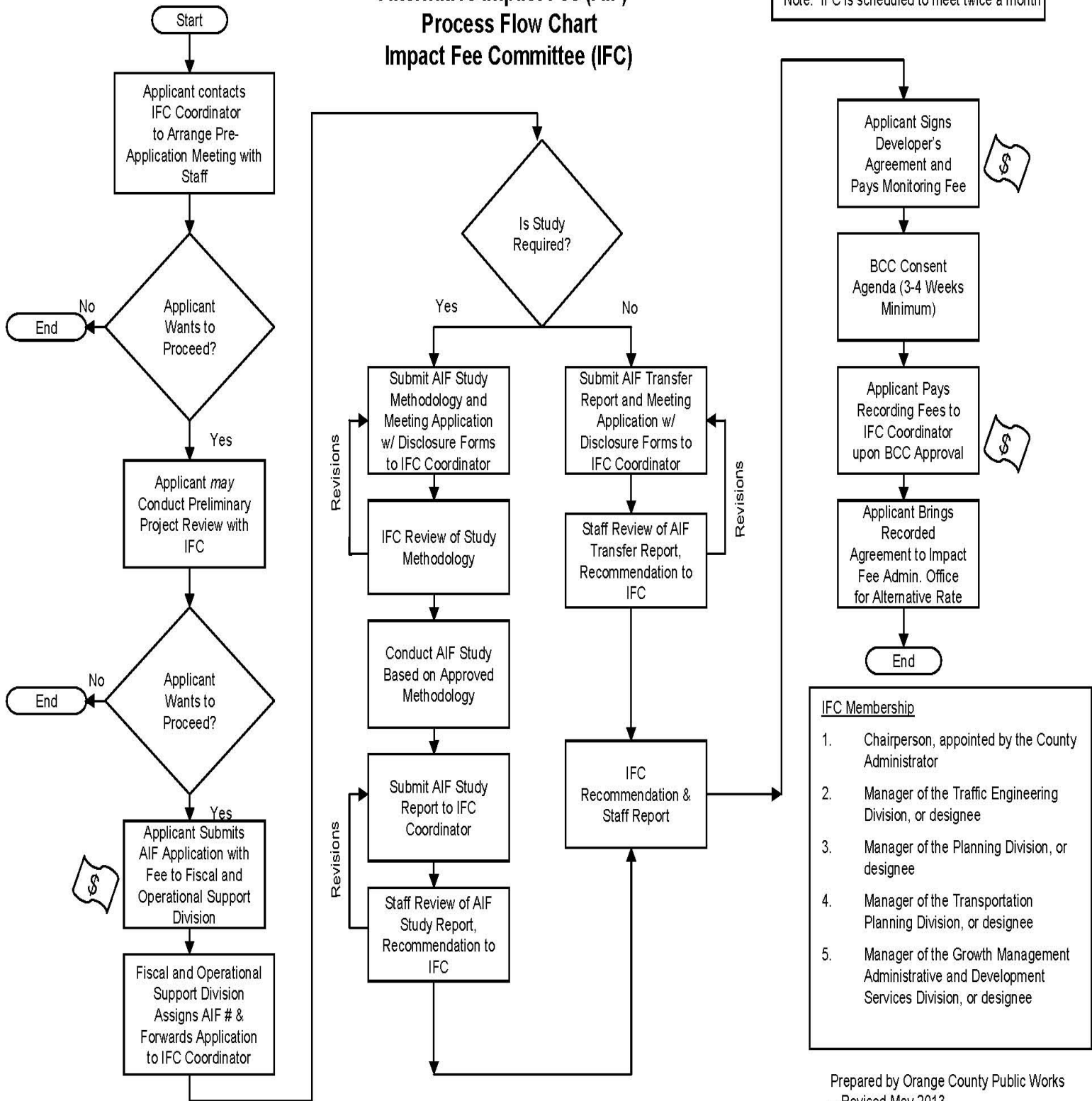
AIF Study Minimum Report Requirements: The AIF Study is the technical basis of the AIF agreement. This section outlines the minimum requirements for the reporting of an AIF Study. Additional information may be required depending on the circumstances of individual cases.

AIF Transfer Minimum Report Requirements: An applicant may request a transfer of a previously approved study if it complies with the requirements of Section 23-93 (d), Orange County Code, and Orange County Administrative Regulation 4.02. If an applicant intends to transfer an approved AIF study, the applicant is required to submit a letter/report justifying the transfer. The minimum requirements for such a document are outlined in this section. Additional information may be required depending on the circumstances of individual cases.

PROCESS FLOW CHART

Alternative Impact Fee (AIF) Process Flow Chart Impact Fee Committee (IFC)

Note: IFC is scheduled to meet twice a month



GENERAL METHODOLOGY

Alternative Impact Fee Study General Methodology

Study Site:

- The applicant is required to identify at least one (1) site similar to the proposed development. The study site should be located within Orange County. If an applicant demonstrates that no appropriate study site exists in Orange County, then a study site outside of Orange County may be approved by the Impact Fee Committee. The AIF study is conducted at this site following the guidelines below:

Mechanical Traffic Counts:

- Mechanical Traffic Counters should be provided at ALL access connections of the study site. The count hoses should be in an acceptable configuration as to obtain reliable and acceptable traffic counts at the ingress/egress points of the site.
- The Mechanical Traffic Counters should provide a minimum of five consecutive weekdays of traffic data (i.e. from 12:00 am Monday to 11:59 pm Friday) totaling a minimum of 120 hours.

Calibration Traffic Counts:

- Calibration Counts should be conducted for each mechanical traffic counter at the site. These counts consist of manual counts conducted by individuals observing the traffic entering and exiting the site at the locations where the mechanical traffic counters are collecting information.
- The Calibration Counts should be conducted for a minimum of four hours daily (typically from 2:00 p.m. to 6:00 p.m.), and for a minimum of five consecutive weekdays, totaling a minimum of 20 hours.

Origin-Destination Surveys:

- Origin-Destination Surveys must be completed for a minimum of 25% of the vehicles entering the site during the daily survey period. This ensures an adequate statistical sample size for the survey.
- Origin-Destination Surveys should be conducted for a minimum of four hours daily (typically from 2:00 p.m. to 6:00 p.m.) and for a minimum of five consecutive weekdays, totaling a minimum of 20 hours. The surveys must be conducted during the same time period as the calibration counts.

Exceptions and Deviations:

- The methodology guidelines presented above may be amended to accommodate special circumstances. Exceptions, such as the need for manual counts due to shared driveways, the use of video cameras for manual traffic counts, etc., are evaluated on an individual basis and are agreed upon during the methodology approval process.

Written Documentation of Proposed Methodology:

Written documentation of the proposed study methodology must be submitted to the Traffic Engineering Division. In addition to a description of the proposed data collection methodology, this documentation must include a project synopsis, proposed project overview, and study site overview, as described in more detail in the minimum requirements for an alternative impact fee study report.

**MINIMUM REQUIREMENTS FOR
ALTERNATIVE IMPACT FEE
STUDY REPORT**

Alternative Impact Fee Study Minimum Report Requirements

I. PROJECT SYNOPSIS

II. PROPOSED PROJECT OVERVIEW

- Subject Site Properties: Size, Land Use, Character, Neighborhood, Surrounding Transportation Facilities, Background Traffic ...
- Discussion of circumstances that qualify the subject for an Alternative Impact Fee study
- Location Map
- Determination of Project Location as Inside/Outside the Alternative Mobility Area (AMA)
- Site Plan/Map

III. STUDY SITE OVERVIEW

- Study Site Properties: Size, Land Use, Character, Neighborhood, Surrounding Transportation Facilities, Background Traffic ...
- Comparative analysis and discussion of similarities to the subject site, including:
 - Merchandise, Service, Function ...
 - Surroundings, Environment
 - Hours of Operation
 - Any Other Pertinent Information
- Table Summarizing Comparative Analysis
- Location Map
- Determination of Study Site Location as Inside/Outside the Alternative Mobility Area (AMA)
- Site Plan/Map
- Counters/Surveyors Layout and Location Diagram

IV. DATA ANALYSIS: TRIP GENERATION

- Summary Table of Machine Count per Driveway (24-hour), by direction (inbound and outbound)
- Summary Table of Machine Count per Driveway (Survey Hours, 15 Minute Increments)
- Summary Table of Manual Calibration Count per Driveway (Survey Hours, 15 Minute Increments)
- Adjusted Machine Count Calculation Table
Adjustment Factor = Manual Calibration Count / Machine Count
- The adjustment factor is calculated for each driveway individually by direction for the four hour survey period. Adjustment Factors shall not be less than 0.85)

- Adjusted 24-hour Machine Count = 24-hour Machine Count X Adjustment Factor
- Often hotels, shopping centers, etc., are partially occupied at the time of the study. The study must be conducted when the site is a minimum of 85% occupied.
- Occupancy Factor is calculated based on the Following Formula:

$$\text{Occupancy Factor} = \# \text{ Units Occupied} / \text{Total} \# \text{ Units}$$

- Trip Generation Rate Calculation Based on the Following Formula, and rounded to two decimal places:

$$\text{Trip Generation Rate} = \frac{\text{5-day Sum of Adjusted 24-hour Machine Count for all driveways, both directions} / \text{Project Size (KSF, Rooms)} / \text{Occupancy Factor}}$$

- Comparison with Institute of Transportation Engineers' Trip Generation for Similar Land Use

V. **DATA ANALYSIS: TRIP LENGTH**

Trip lengths must be calculated for all incoming trips surveyed, regardless of trip type.

- Table Summarizing the 25% Sample Size Calculation. The number of surveys must be 25% or more than the number of incoming vehicles during the 4-hour survey period.
- Summary Table of All Observed Origins Including:
 - Trip Lengths – the distance within Orange County on public roads from the survey trip origin to the study site;
 - Limited Access Trip Lengths – the part of the trip length that is travelled on limited access facilities such as interstate and toll roads, including ramps;
 - Cumulative Trip Length – the sum of the trip lengths for each survey;
 - Cumulative Limited Access Trip Length – the sum of the limited access trip lengths for each survey; and Survey Form Numbers.
- Assessable Trip Length (ATL) Calculation Based on the Following Formula, and rounded to two decimal places:

$$\text{ATL (miles)} = \text{Cumulative Trip Length (miles)} / \text{Total} \# \text{ of Surveys}$$

- Comparison with Assessable Trip Length in Orange County's Impact Fee Ordinance
- Total Trip Length (TTL) Calculation Based on the Following Formula, and rounded to two decimal places:

$$\text{TTL (miles)} = \text{ATL (miles)} + 0.50$$

VI. DATA ANALYSIS: NEW TRIPS

A primary (new) trip is a new or additional trip added to the county’s major transportation network system. From the origin-destination survey, a trip should be considered to be a primary (new) trip if the driver indicates that after leaving the study site he/she will return to the origin.

- Summary Table of All Observed Origin-Destination Pairs Including Trip Types (Primary (New)Trips vs. Pass-by or Diverted Trips) and Survey #s
- New Trip Factor Calculation Based on the Following Formula, and rounded to the nearest whole percent:

$$\% \text{ New Trips} = \# \text{ Primary (New) Trip Surveys} / \text{Total \# of Surveys} \times 100$$

- Comparison with New Trip Factor in Orange County’s Impact Fee Ordinance

VII. DATA ANALYSIS: LIMITED ACCESS DISCOUNT FACTOR

The Limited Access Discount Factor (LADF) is the portion of the ATL occurring on interstate highways or toll facilities excluding through traffic that does not have an origin or destination in the county.

- LADF Calculation Based on the Following Formula, and rounded to three decimal places:

$$\text{LADF} = \text{Cumulative Limited Access Trip Length} / \text{Cumulative Trip Length}$$

VIII. IMPACT FEE CALCULATION

- Alternative Impact Fee Calculation based on Results of the Alternative Impact Fee Study – See ordinance for impact fee formulas (Within the AMA vs. Outside the AMA)
- Comparison of Alternative Impact Fee Rate and Standard Impact Fee Rate according to the fee schedule

IX. APPENDICES

- Alternative Impact Fee Methodology Letter and Correspondences
- Machine Traffic Count Data
- Manual Traffic Count Data (Original Field Counts)
- Survey Forms (Individually Numbered, Organized by Survey Date and Trip Type)

Orange County Alternative Impact Fee Sample Survey Form

Date: _____ Time: _____ PM Surveyor: _____

<<Greeting>>,

We are conducting a traffic study on behalf of PROPERTY NAME. We would appreciate your assistance by answering a few simple questions. Thank you for your cooperation and have a nice day.

1. Did you arrive here by car/vehicle? Yes No

2. Are you the driver? Yes No

3. Where did your trip begin immediately prior to arriving here?
(Address, Subdivision, Shopping Center, Intersection, etc.)

4. Which roads did you use to arrive here? (List route choice)

5. Did you use any interstate or toll facilities to arrive here? Ex: SR 417, SR 408, SR 528, I-4, etc. _____

6. Where will you go after leaving here?
(Address, Subdivision, Shopping Center, Intersection, etc.)

Trip Type (New Trip/Pass-by) _____

Trip Length (Miles) _____

Limited Access Trip Length (Miles) _____

MINIMUM REQUIREMENTS FOR ALTERNATIVE IMPACT FEE TRANSFER REPORT

Alternative Impact Fee Transfer Minimum Report Requirements

I. PROJECT SYNOPSIS

II. PROPOSED PROJECT OVERVIEW

- Subject Site Properties: Size, Land Use, Character, Neighborhood, Surrounding Transportation Facilities, Background Traffic ...
- Discussion of circumstances that qualify the subject for an Alternative Impact Fee study
- Location Map
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III. STUDY SITE OVERVIEW

- Study Site Properties: Size, Land Use, Character, Neighborhood, Surrounding Transportation Facilities, Background Traffic ...
- Comparative analysis and discussion of similarities to the subject site, including:
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 - Surroundings, Environment
 - Hours of Operation
 - Any Other Pertinent Information
- Table Summarizing Comparative Analysis
- Location Map
- Determination of Study Site Location as Inside/Outside the Alternative Mobility Area (AMA)
- Site Plan/Map

IV. IMPACT FEE CALCULATION

- Alternative Impact Fee Calculation based on the trip characteristics from the Alternative Impact Fee Study – See ordinance for impact fee formulas (Within the AMA vs. Outside the AMA)
- Comparison of Alternative Impact Fee Rate and Standard Impact Fee Rate according to the fee schedule

V. APPENDICES

- Alternative Impact Fee Correspondences