OKI FIAM 2.0
Case Studies

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Regional Planning Forum

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OKI Regional Council of Governments

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What is Fiscal Impact Analysis?

Appetizers

1	Zakouski a la Russe (For Two)		MP
2	Oysters Mornay	1 dozen	MP
3	Oysters Mornay	1/2 dozen	MP
4	Escargots a la Bourguignonne	1 dozen	MP
5	Escargots a la Bourguignonne	1/2 dozen	MP
6	Caviar with Eggs		MP
7	Blinis Caviar		MP
8	Blinis Salmon		MP
9	Smoked Salmon		MP
10	Smoked Ham		MP
11	Stuffed Mushrooms with Smetana		MP
12	Chicken Liver with Caper Sauce		MP
13	Shrimp Cocktail		MP
14	Egg Millionaire		MP

Soups

15	Borshch	MP
16	Fish Solianka	MP
17	Onion Soup	MP
18	Meat Solianka	MP
19	Chicken Consomme with Egg	MP
20	Fresh Mushroom	
21	Fresh Oyster	
22	Cream of Sweet Corn	

Components of Fiscal Impact Analysis

<u>Revenues</u>

- Property Tax
- Payroll / Income Tax
- Sales & Hotel Tax
- Charges for Service
- Fees, Fines, and Forfeitures
- Intergovernmental and Miscellaneous

<u>Costs of Service</u>

- Public Safety
- Infrastructure
- Public Health & Welfare
- Community Development
- Parks And Recreation
- General Government

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Methods of Fiscal Impact Analysis

- Average Cost Method

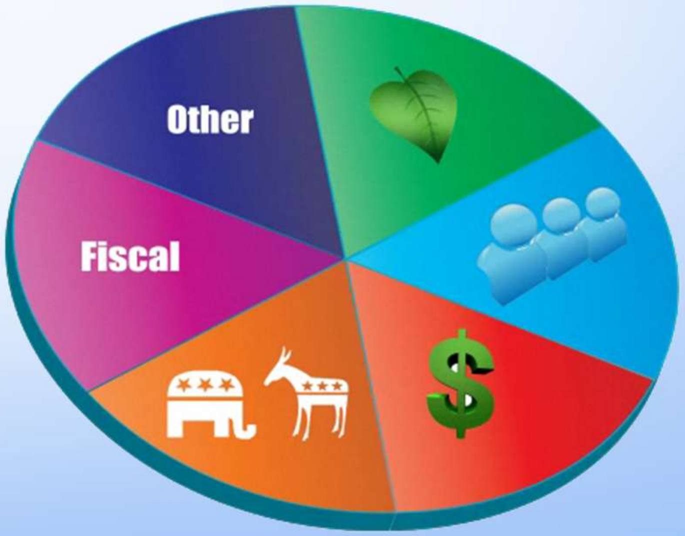
- Marginal cost method

Why do Fiscal Impact Analysis?

- Land use planning exercise
- Study the impact of an unfamiliar land use
- Establishing a TIF district
- Evaluating impact fees
- Determine the fiscal impact of a proposed development

Not to be the sole source for making land use decisions

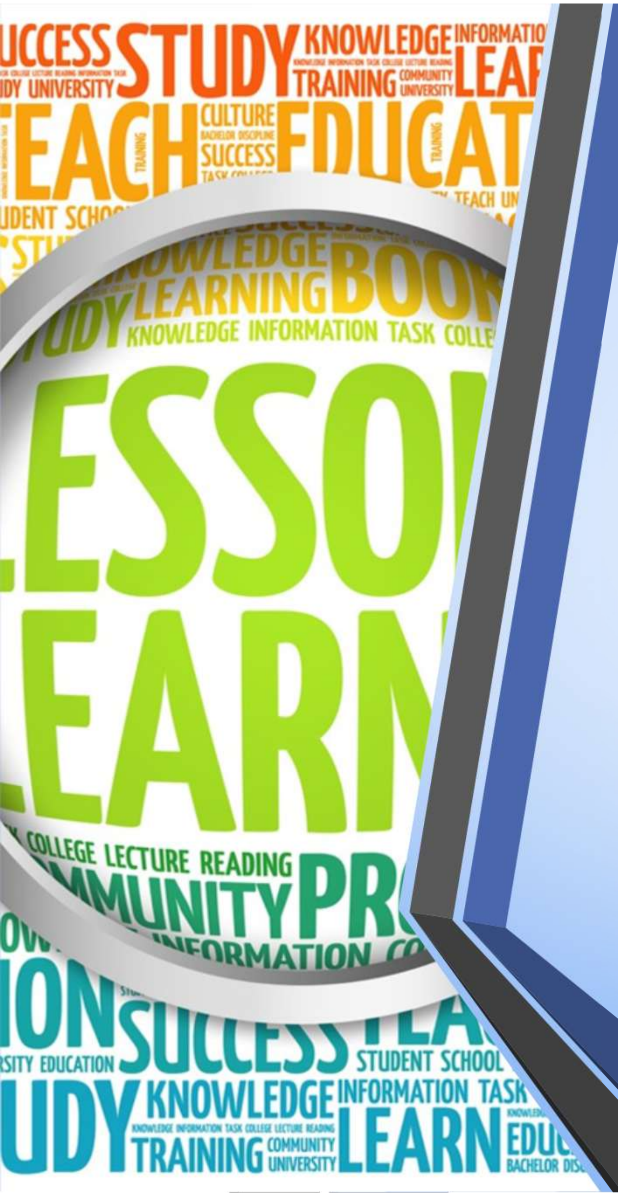
Land use decisions are complex and involve multiple factors



HOW do WE GROW From Here?
Strategic Regional Policy Plan

The Strategic Regional Policy Plan recommends a FIAM to:

- Help guide land use policy decisions
- Allow for an integration of land use and budget considerations
- Bring a realistic sense of the costs of growth into the public discussion
- Gain an understanding of the likely demands for services and capital facility impacts



Lessons Learned

- FIAM is a scenario planning tool
- Best applied when creating plans
- Flexibility to add additional land uses
- Needs to be offered as a service
- Streamlined community set up

FIAM 2.0 Overview

- Excel-based model
- Compare multiple scenarios
- Community data pre-loaded
- Delivered as a free service

FIAM 2.0
Case Studies

City of Oxford OHIO
HOME OF MIAMI UNIVERSITY

Application of the FIAM

Case Study/Background

- Oxford purchased 47 acres of residentially zoned land in 2008
- The land sat vacant since that time, as demand for additional housing choices has grown
- The City has had difficulty in selling the land because of the purchase price

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Application of the FIAM

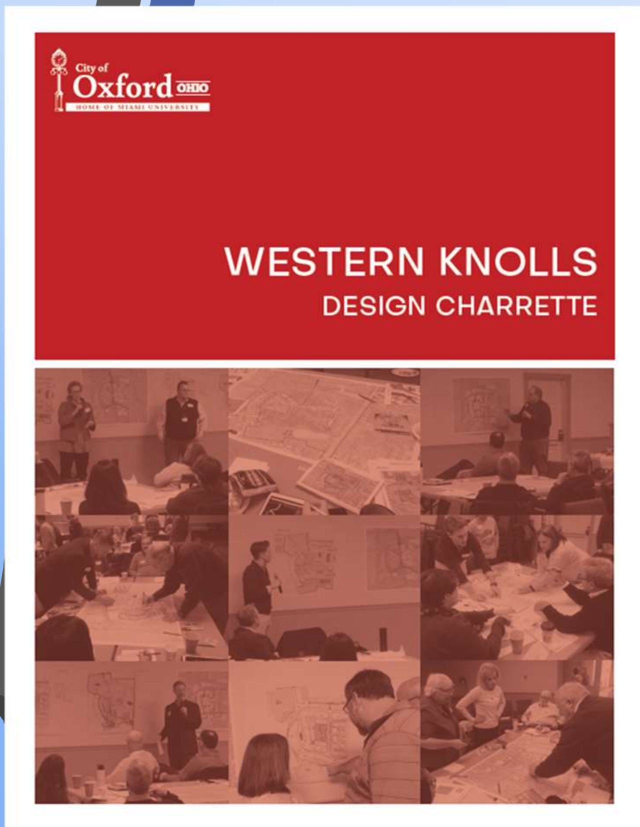
Groups spend their morning brainstorming and recording ideas for the site.

Group D members Vicki Cheng, David Prytherch, and Shana Rosenberg work on adding color and finishing touches to their plan.

Case Study/Background (cont.)

- City staff conducted a design charrette for the property as part of its annual WTPD event
- The charrette resulted in 5 different development scenarios
- City staff reached out to OKI for assistance in comparing the fiscal impact of the scenarios

Application of the FIAM



Attached Units (e.g. Condos) | Structures containing approx 3-5 dwelling units, each accessed from the exterior

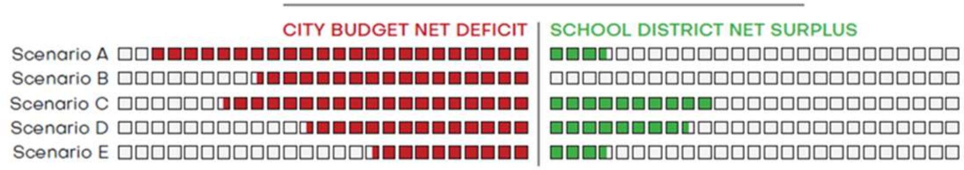
Multi-Family Residential | Structures usually containing more than 5 dwelling units, with shared interior access

Commercial/Mixed Use | Structures containing a mix of commercial, residential, or specialized uses

FINANCIAL IMPACTS

Following the event, staff engaged planners at the OKI Regional Council of Governments to run each of the five produced scenarios through their agency's Fiscal Impact Analysis Model (FIAM). The model estimates the real life impacts of development on a community, including tax revenue and service expenditures, based on a series of assumptions/averages generated from researching a large sample of communities in the region. Each scenario returned a negative net impact on City finances. This is not unexpected due to the scenarios consisting primarily of residential uses, which tend to incur more expenses than revenue produced. However, it is important to note that new residential development can create other positive financial impacts for the community, such as increased spending power at local businesses and housing supply relief to drive down costs. Although beyond the scope of this report, these impacts could be assessed at a later point in time once anticipated incomes are determined.

FISCAL IMPACT COMPARISON



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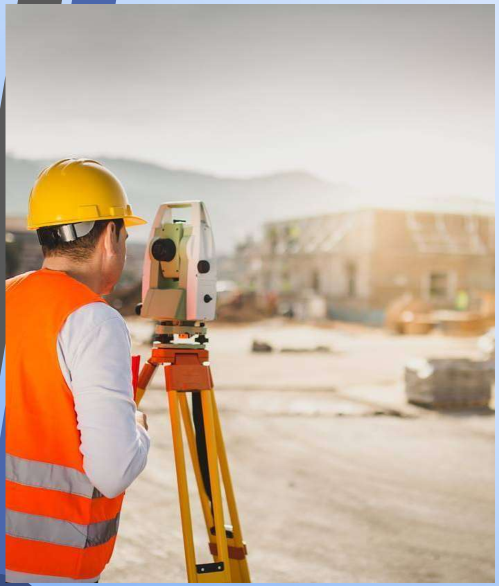
City of Oxford OHIO — HOME OF MIAMI UNIVERSITY

Application of the FIAM

Next Steps



- The property was advertised at a market rate, using the completed publication, including FIAM
- One proposal was received for 10 of the 47 Acres, for 50 affordable senior housing units and a new senior center
- The City is currently in negotiations for a purchase agreement of 10 acres
- The City hopes that the development is funded and built, spurring additional housing to meet demands and activate the area

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Springdale Office to Residential

Case Study/Background

- Developer-proposed conversion of office to MFR and townhomes.
- City wanted to know relative fiscal impact of MFR vs townhomes
- 12 acre site

Springdale Office to Residential

Unit Counts for Springdale Scenarios

Land Use	Scenario A	Scenario B	Scenario C
Multi-Family	132	0	396
Townhomes	97	146	0

Springdale Office to Residential

Springdale Scenario Results

LOCAL GOVT NET ESTIMATED IMPACT			
	Scenario_A	Scenario_B	Scenario_C
Net Revenues	$172,920	$111,581	$296,376
Net Expenditures	$570,203	$372,428	$967,352
Net Impact	**($397,283)**	**($260,847)**	**($670,976)**

Springdale Office to Residential

Springdale Scenario Results

SCHOOL NET ESTIMATED IMPACT			
	Scenario_A	Scenario_B	Scenario_C
Net Revenues	$615,317	$365,824	$1,117,003
Net Expenditures	$881,014	$622,621	$1,402,066
Net Impact	**($265,698)**	**($256,797)**	**($285,063)**

Springdale Office to Residential

Conclusions

- Residential typically has negative fiscal impact
- Tax rates have a large effect on results
- Sometimes other priorities outweigh fiscal impact

Cincinnati CBD Parking Lot Study

Case Study/Background

- City looking to strongly promote development on surface parking lots in CBD
- Looking for FIAM to make a financial argument to promote development
- Four Scenarios: 80/20 and 50/50 office to residential. Max density and typical density for each.

Cincinnati CBD Parking Lot Study

Cincinnati CBD Parking Development Scenarios

Land Use	50/50 Max	80/20 Max	50/50	80/20
Parking (existing)	71.5 ac	71.5 ac	71.5 ac	71.5 ac
Office	4.4M sf	11M sf	2.2M sf	5.5M sf
MFR	18,190 units	11,807 units	9,095 units	5,903 units
Retail / Hotel	3M sf	3M sf	3M sf	3M sf

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Cincinnati CBD Parking Lot Study

Cincinnati Scenario Results

LOCAL GOVT NET ESTIMATED IMPACT					
	50/50 Max	**80/20 Max**	**50/50**	**80/20**	**Existing Parking**
Revenues	$73,415,555	$79,122,870	$42,476,919	$45,330,176	$1,359,851
Costs	$78,693,122	$70,818,589	$43,335,229	$39,359,405	$931,805
Net Impact	**($5,277,567)**	**$8,304,281**	**($858,310)**	**$5,970,771**	**$428,046**

Cincinnati CBD Parking Lot Study

Conclusions

- Land in CBD is valuable regardless of use
- Estimated Costs in FIAM are tied to people and activity
- People tied to primary use (office, retail, residential); not to parking

In Summary

- Fiscal impact is different for each community based on wide range of factors
- Important, but should be used strategically
- It gets complicated fast

Questions?

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