

CITY OF SHELBYVILLE

ADAM M. RUDE
DIRECTOR



ALLAN HENDERSON
DEPUTY DIRECTOR

PLAN COMMISSION

Meeting Date: 02/25/2019

Case Number and Name:	PC 2019-02: Parks and Recreation Impact Fee Report
Petitioner's Name:	City of Shelbyville, Parks Board
Action Requested:	A formal recommendation to the Common Council on the Parks and Recreation Impact Fee Report

The concept behind a Park Impact Fee is that all new residential units in the City place an added burden on the existing Parks System, and to maintain the level of service we offer now, new homes should pay a fee that is equivalent to the burden they are placing on the Parks System so that it can expand accordingly. The Plan and Building Department Staff, along with the City Attorney, and the Parks Department Staff have been working for several months to compile the data shown in this report so we could responsibly estimate the anticipated growth in the community along with the burden that will place on the existing Park's System. This report utilizes equations established in state law to determine an appropriate Park Impact Fee, based on the estimate growth and expected burden on the Park System.

Attached with this staff report, you will find the entire report for your review. We will spend time during the Plan Commission meeting presenting the process that was taken and explaining the figures in the document.

**Staff Recommendation: Forward a Favorable Recommendation to
Common Council**

PC 2019-02; Exhibit A:

City of Shelbyville Recreation Zone Improvement Plan 2019 - 2028

A Zone Improvement Plan for Parks & Recreation Facilities
City of Shelbyville – Parks & Recreation Department

The proposed:

City of Shelbyville Recreation Zone Improvement Plan 2019-2028

For:

City Parks & Recreation Facilities

Prepared for:

City of Shelbyville Park Board
City of Shelbyville Plan Commission
City of Shelbyville City Council

Shelbyville, Indiana

Prepared by:

Lehman & Lehman, Inc.

Landscape Architects | Planners | Placemakers
Mishawaka, Indiana

With Review by:

Matt House, P.E.

Professional Engineer
City of Shelbyville

February 2019



**City of
Shelbyville
Indiana**



The proposed:

City of Shelbyville Recreation Zone Improvement Plan 2019-2028

This report was prepared under contract for the
City of Shelbyville by:

Charles F. Lehman, ASLA, FRSA
President, Lehman & Lehman, Inc.
Landscape Architects | Planners | Placemakers
510 Lincolnway East, Suite C
Mishawaka, Indiana 46544

With Review by:
Matt House, P.E.,
Professional Engineer, City of Shelbyville

Completed February 2019



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Shelbyville Recreation Zone Improvement Plan Study

February 2019



In 1991, the Indiana General Assembly passed an impact fee bill that created an alternative funding mechanism for infrastructure improvements in fast growing areas. The essence of the legislation was to allow local governments the option of passing onto new residents the cost of building the new infrastructure demanded by those same new residents.

This will be the initial Infrastructure Improvement Plan for Parks and Recreation Facilities (Recreation Impact Fee Study) for the City of Shelbyville. This study started several months ago, following the process as outlined by the 1991 Indiana Code. A Recreation Impact Fee Advisory Committee was established and worked with the Consultant in updating the current recreation component inventory along with the related standards and established a recreation impact zone. Population projections were arrived at by analyzing existing developments as well as new development parcels of the planning area, related residential building permits were forecasted, both current and future recreation component deficiencies were calculated, and costs for these infrastructure deficiency improvements were established for both current (2019) and future (2028) needs. The impact fee for the impact fee zones were determined by dividing the estimated costs of the 10-year deficiencies by the number of projected residential building permits of each impact zone during that same period.

According to State Statute, Recreation Impact Fees are collected prior to the issuance of each residential building permit, and the first collection will occur six (6) months after the final approval by the City Council of the Impact Fee ordinance. The fees are then placed in an interest-bearing account, and related expenses for improvements are then paid from that account. Since impact fees cannot be used to fund current deficiencies, those improvements will need to come from other resources of the City. Recreation Impact Fees can only be used for the costs of the projected 10-year future needs determined by future populations.

An impact fee, by ordinance, may not be collected for more than five years without a review and update of the Infrastructure Plan and adoption of the fee by the City Council. Attached is the new Infrastructure Improvement Plan. The City of Shelbyville staff prepared the plan with assistance from *Lehman & Lehman, Inc.* After preparation, the plan was submitted to **Matt House, P.E.** (Shelbyville's City Engineer), for final review and comment. The plan establishes new park and recreation standards for Shelbyville and recommends a one-zone structure and Recreation Impact Fees that will be necessary in order to achieve the City of Shelbyville's Park and Recreation standards.

After careful analysis, the Shelbyville Park Infrastructure Advisory Committee and the City of Shelbyville staff feels that the recommended Recreation Impact Fee of **\$1,005** is a responsible fee for the recommended standards. The Shelbyville Park Infrastructure Advisory Committee recommends acceptance of the fee by the Shelbyville Park Board before being placed before the Shelbyville Planning Commission and City Council for final adoption.

Adoption of these parks and recreation standards will ensure the continued delivery of quality parks and Recreation services for all of the Citizens of Shelbyville.

Sincerely,

Karen Martin, Park Director
City of Shelbyville Parks & Recreation

Acknowledgements

City of Shelbyville Park Infrastructure Advisory Committee

Committee Members:

- Gary Bowen, *Park Board President*
- Karen Martin, *Park Director, Shelbyville Parks & Recreation*
- Jennifer Meltzer, *City Attorney*
- Paul Munoz, *Developer*
- Linda West, *Real Estate*
- Jeff Wright, *City Council / Park Board Liaison*

Staff and Consultant Members

- Karen Martin, *Park Director, Shelbyville Parks & Recreation*
- Adam Rude, *Director, Shelbyville Planning & Building*
- Matt House, *City Engineer, City of Shelbyville*
- Chuck Lehman, *Lehman & Lehman, Inc. (Consultant)*

Mayor

- Tom DeBaun

Clerk Treasurer

- Frank Zerr

City Council

- Rob Nolley, *3rd Ward, President*
- Joanne Bowen, *1st Ward*
- David Carmony, *2nd Ward*
- Brad Ridgeway, *4th Ward*
- Jeff Wright, *5th Ward*
- Brian Asher, *At-Large*
- David Phares, *At-Large*

Park Board

- Gary Bowen, *President*
- Gary Nolley, *Vice President*
- Mike Babbitt, *Member*
- Terie Anderson, *Member*

Advisory Plan Commission

- Mike Evans, *President*
- Doug Cassidy, *Vice President*
- Joe Lux
- Barb Lewis
- Wade Lewis
- Joanne Bowen
- Matt House
- Gary Nolley
- Ben Hall
- Josh Martin (Alternate)

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Shelbyville Recreation Zone Improvement Plan Study

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Executive Summary

Background

The City of Shelbyville and its surrounding area has, over the past decades, experienced significant growth in residential development. As a result, the public infrastructure systems (roads, drainage, water/sanitary utilities and parks) are, or will become, strained to keep pace with the demands placed on them.

In anticipation of these demands, the City of Shelbyville is in the process of implementing and updating one of these public infrastructure systems by way of a Recreation Impact Fee Ordinance. The *Parks and Recreation Master Plan Update and the City's Comprehensive Plan* shows that the demand for recreational facilities will intensify because of the demographics of the growing population base. It is also recognized that a quality system of parks, green spaces and pathways/trails adds to the economic value and quality of life of the entire community.

The demands placed on the Park System by rapid growth have, and will, outpace the City's financial ability to provide the new and expanded facilities identified in the Parks and Recreation Master Plan. The current revenues are devoted almost entirely to maintaining and operating existing park facilities and programs. New sources of capital improvement revenue are needed. The Recreation Impact Fee Ordinance will benefit the City and community in the future by keeping pace with the population growth while maintaining the level of adopted recreation standards.

The Plan acknowledges that the 2010 Census data will provide the basis for the data on population and demographics for the City. The City has provided the Consultant with updated population estimates that were used as part of this study analysis as well.

History of Recreation Impact Fees

In 1991, the State of Indiana enacted an impact fee statute that allows local communities to collect impact fees (monetary charges) to pay for, defray or mitigate the capital costs and improvements to infrastructure necessitated to serve the proposed new development.

The essence of the legislation was to allow local governments the option of passing onto new residents the costs of building the new infrastructure expected by those same residents.

Impact Fees Facts

Need for and Application of Impact Fees

- Best applied to Fast Growing Communities (or projected)
- Considered as an "Entrance Fee" for residents to build and live in the Community
- Funds are applied directly to the infrastructure needs caused by the growth

Different Types of Development Impact Fees

- Park/Recreation, Roads, Water/Sanitary Utilities, and Drainage

Impact Fee Studies

- Cover 10-year projection period
- Must be updated, at a minimum, every five years
- Also used to define development standards

Shelbyville Recreation Zone Improvement Plan Study

Benefits of Recreation Impact Fees

- Future residents pay for the increased demand on infrastructure services (defined as Community Level of Service)
- Current residents do not bear the burden of infrastructure expansion due to population growth
- Maintains quality of life as community grows

Development Impact Fees

Development Impact Fees, as described by this Zone Improvement Plan (herein Plan), will shift part of the cost of new and expanded park facilities from the community at large to the new developments that are generating the need for those new and expanded facilities. ***Impact fees, however, cannot be used to finance the current needs of improvements required to raise the Current Level of Service to the Community Level of Service, hereafter referred to as "deficiencies."***



Impact fee logic has long been debated, discussed and endorsed by those who are involved in public finance. In 1991, the Indiana General Assembly enacted legislation [Indiana Code (IC) 36-7-4-1300] (see **Appendix A**) that enables localities to impose Development Impact Fees for certain types of infrastructure improvements, including park and recreational facilities. Among other things required of the locality, the legislation stipulates that:

- An Impact Fee Advisory Committee be appointed
- An Impact Fee Zone be established
- A Zone Improvement Plan be prepared
- An Impact Fee be determined and
- An Impact Fee Review Board be appointed

Park Infrastructure (Impact Fee) Advisory Committee

The City Administration of Shelbyville appointed a Recreation Impact Fee Advisory Committee in 2018. The Committee consisted of members of the Park Board, City Council, Real Estate Brokers and Developers. City staff members of the Planning and Engineering Departments were included in addition to others appointed to fulfill statutory requirements. The Committee, listed on the acknowledgment page, met on several occasions to research and review data, to establish standards for park facilities, and to formulate the plan and strategies as described herein.

Although the City Council has jurisdiction only within the Shelbyville City limits, the Committee concluded early in its deliberations that the Study Area of this Plan should include all of the Shelbyville Planning Area Boundary (the same area as encompassed with its Comprehensive Plan) for the following reasons:

- It is reasonable to expect that some properties adjacent to the current corporate boundaries will become part of the City of Shelbyville some in the time frame of this study
- The City is continuing to grow into the planning area through voluntary annexation, and
- The City's entire land use planning area is within the future service area of the City

Shelbyville Recreation Zone Improvement Plan Study

Impact Zone

Within the Study Area, the Advisory Committee recommended the establishment of a single (one) Impact Zone to coincide with the corporate and Comprehensive Planning boundary of the City as it continues to expand in the future through annexations. Thus, the Impact Zone is expected to expand through annexation until it encompasses the entire Planning Jurisdiction and future areas of annexation in the Township(s) within the County. More particular, the Impact Zone boundaries for the City of Shelbyville are co-terminus with the existing corporate boundaries of the City, as such boundaries may be extended from time to time through annexation, and over which boundaries the City exercises planning and zoning jurisdiction.

Figure 1 is a map (from the City's Comprehensive Plan) that shows the Study Area which consists of the City's Corporate Boundaries. This area constitutes the boundary of the Impact Fee Zone. This map also illustrates the projected current city limits, future growth boundaries along with the projected Future Land Uses, transportation projections, etc. as per the City's Comprehensive Plan.

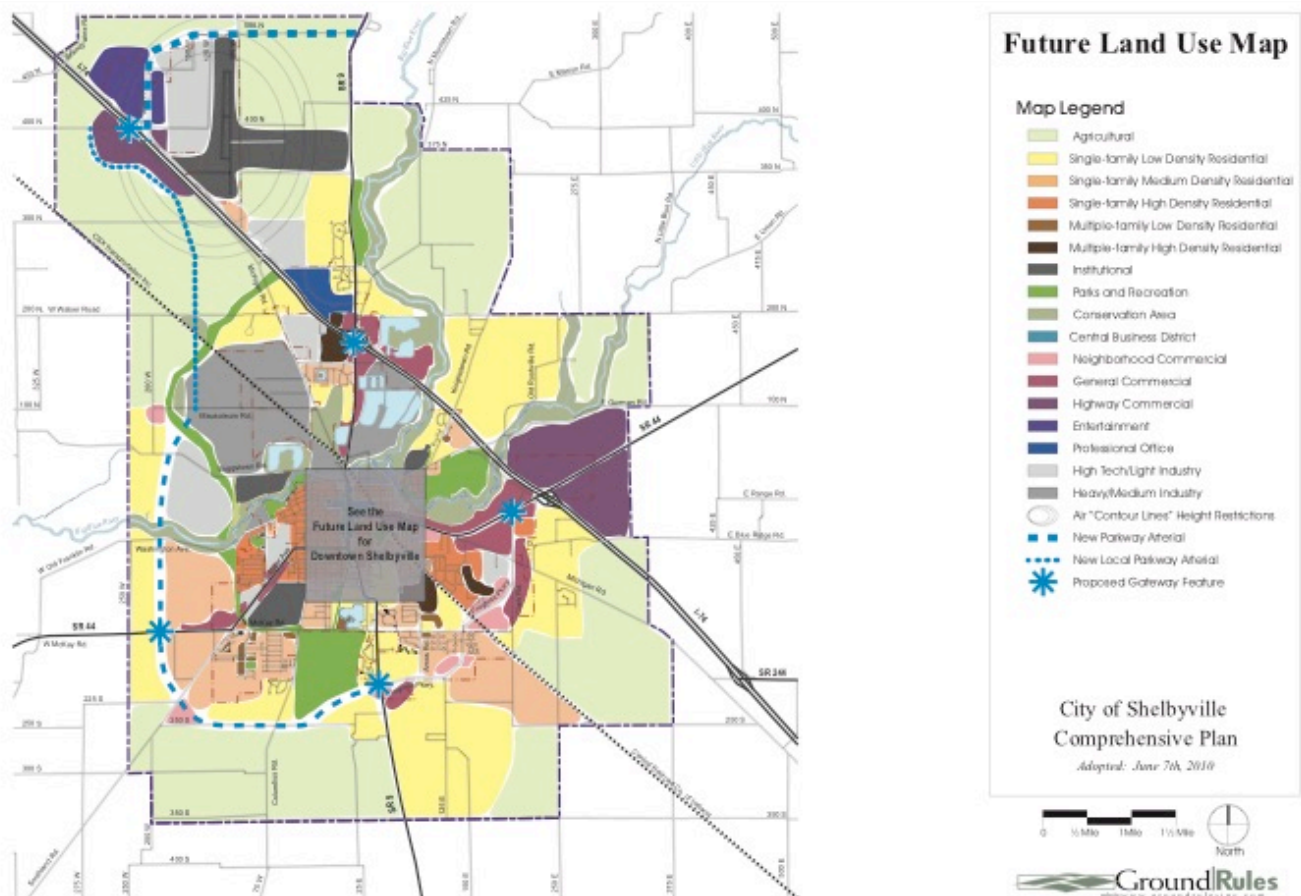


Figure 1 – Study Area (source: City of Shelbyville's Comprehensive Plan)

Zone Improvement Plan

The Zone Improvement Plan is described by this document and examines the existing park facilities and determines the costs to (A) overcome existing deficiencies and (B) to meet future needs according to Community Level of Service standards established herein.

Impact Fee Review Board

As required by Indiana Code 36-7-4-1338, and before the Impact Fee is implemented, the City will establish an Impact Fee Review Board, consisting of Shelbyville citizens. The law requires that the Impact Fee Review Board include one real estate broker and one professional engineer, both licensed in Indiana, and one certified public accountant.

Other Planning Efforts Acknowledged in this Plan

This Recreational Impact Fee study acknowledges the existing and the progress of the implementation of both the City's Comprehensive Plan and Parks and Recreation Master Plan, as constituting the vision for the City and its park system. The Impact Fee recommended in this Plan is a financial strategy that will help achieve that vision.

Conclusions

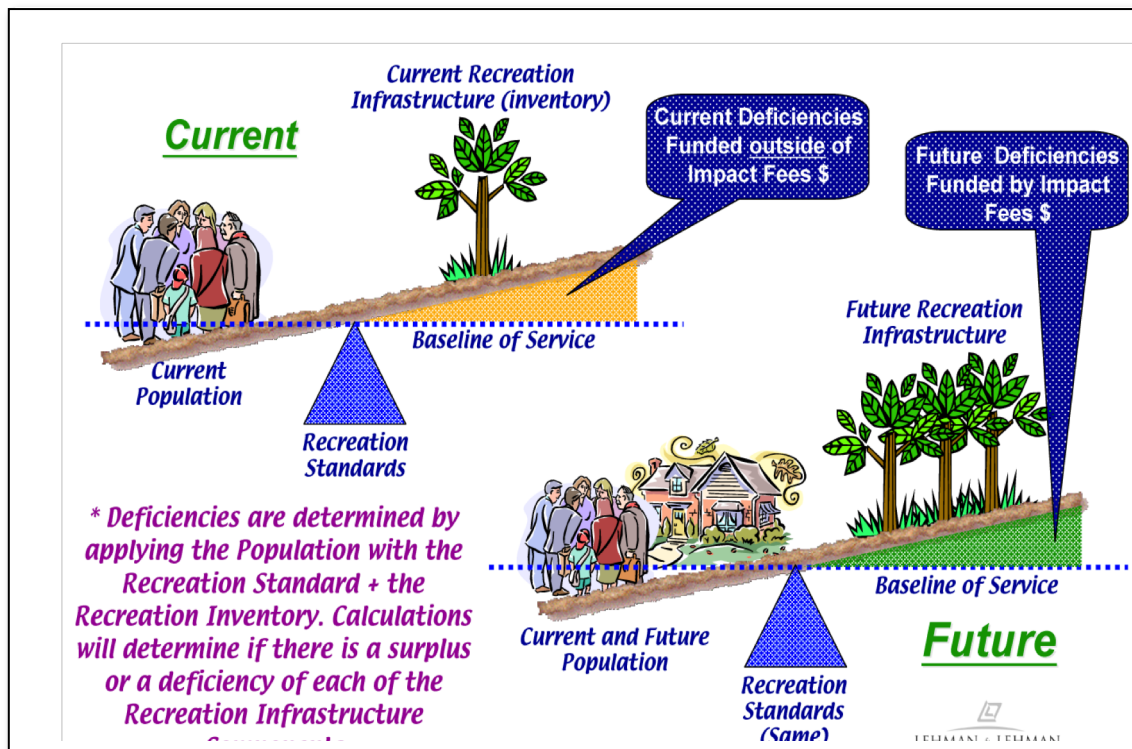
1. The Recreation Impact Fee Advisory Committee recommends to the City of Shelbyville that a new Recreation Impact Fee (RIF) Ordinance be adopted instituting a new Recreation Impact Fee of **\$1,005**.
2. The Advisory Committee did not offer a recommendation regarding any annual adjustment (i.e. an **annual increase percentage** or **Gross Domestic Product** annual figure) factored into the impact fee amount. The Advisory Committee, also, did not offer a recommendation regarding applying a Housing Equivalent adjustment. The Advisory Committee noted both of these RIF adjustments as part of the study but deferred a decision in applying these adjustments to the Plan Commission and/or the City Council.
3. Following the State Code [IC 36-7-4-1340(a)], RIF collection will start six months after approval of the ordinance. The funds collected will be kept in a "Recreation Impact Fee" line item of the City's Accounting Budget.
4. The City of Shelbyville should establish criteria, as policy, for the acceptance of land donations for park use and/or open space. Also, the City of Shelbyville, through its Parks Board, will address, annually, the distribution priorities of the RIF revenues.
5. The City's Park and Recreation Master Plan Update will reflect the standards and goals established as part of this study.
6. Collection of the RIF will occur when new residential building permits are pulled. As an option, Recreation Impact Fee payments can be established using an installment plan as per IC 36-7-4-1324.
7. Reporting of RIF's transactions will be done annually noting recreation impact fees collected and the disbursements for recreation infrastructure components used as part of the impact fee calculations used during the RIF ordinance period.
8. A new RIF update study will be considered annually but the update study should begin at the end the fourth (4th) year of the RIF ordinance allowing time for there to be a smooth transition between the retiring ordinance and the newly adopted ordinance.

Recreation Impact Fee Study Process

The process of defining a Recreation Impact Fee for a community involves a series of steps. Those steps include the following:

1. Establish the Park Impact Fee Advisory Committee
2. Define the Impact Zone
3. Collect current census populations and trends
4. Inventory the current recreation infrastructure for land and facilities (Current Level of Service)
5. Establish Community Level of Service for recreation land and facilities
6. Analyze housing building permits and trends (both inside City limits and within the planning area)
7. Analyze current deficiencies and 10-year infrastructure needs based on Community Level of Service and projected population forecasts
8. Determine costs for meeting current deficiencies and future needs based on Community Level of Service
9. **Recreation Impact Fees (RIF) = Future Recreation Infrastructure Need Costs / Projected 10-year Residential Building Permits**
(As per IC 36-7-4-1321 which states that the Impact Fee = Impact Costs – Non-Local Revenues – Impact Deductions / 10-Year Forecast Building Permits)
10. Prepare a Zone Improvement Plan
11. Recommendations to the Park Board and the Plan Commission
12. Ordinance for City Council's Review and Adoption

Figure 3 – Community Level of Service Illustration



Population and Residential Development Trends

The City of Shelbyville and the surrounding planning jurisdiction area have experienced steady population growth in recent years. Since the housing down turn in the last decade the current growth rate of residential development within the City of Shelbyville (as well as most of Indiana) has been steadily coming back and is having positive impact by the current economic conditions. It is anticipated that residential development will continue to pick up over the next ten years. How much of an increase will continue to be monitored. This study will look at various sources to determine the new residential growth rate over the next ten years. Keep in mind that these projections will be reviewed and updated when this Zone Improvement Plan is updated within the next five years per IC 36-7-4-1340(b).

During the course of this study the Consultant worked closely with the City Administration and Planning Department to review upcoming residential developments in both Shelbyville Planning Jurisdiction as well as existing developments where growth remains.

Trends in Residential Building Growth

Various population projection resources were reviewed including that of the Building Department and U.S. Census, past thirteen-year trends in new residential building permits, as well as another population growth model discussed below. Future Growth of the City will follow the land use patterns and zoning densities as per the City's Comprehensive Plan. The City of Shelbyville's Zoning Plan was used as a resource to evaluate growth in, and adjacent to, the City limits.

Parcel Growth by Development Population Projections

The Growth Model adopted by the Advisory Committee was termed Parcel Growth by Development Model. This model is based on the following:

- Acknowledgment of existing developments and growth projections within the current corporate limits
- Identification of land parcels within the current corporate limits of the City whose projected land use is residential development
- The City's own growth strategies are factored into the growth model
- Growth will occur with stimulation of other developments and infrastructure

The analysis examined residential development capacities based on the actual densities of the planned development or the densities permitted in the City's Zoning Ordinance. It is noted that the growth analysis scenarios used do not reflect the intentions of the existing landowners or the intention of the City regarding annexation.

The Consultant worked with the City and created an inventory of development parcels within the Comprehensive Plan's Planning Boundaries; more particularly within the current Corporate Limits. Following the defined Future Land Use Plan of the Comprehensive Plan, each residential development parcel had a development density (housing units per acre) applied to the parcel to determine what "build out" potential each parcel could carry. Besides the un-development parcels, existing developments that have not been completely built out were also inventoried for this growth analysis.

The Analysis process of this growth model involved the Consultant and City's staff going through each of the un-developed parcels plus the existing developments and subdivisions to determine how much could be built out (by percentage) over the next ten years. By applying a different percentage to each parcel different scenarios of growth were generated.

Shelbyville Recreation Zone Improvement Plan Study

Population Growth Potential of Planning Area

The following work sheets illustrate the residential growth potential. **Table 1** identifies undeveloped land parcels, its acreage, land use zone, the parcels' potential for residential units, and related populations. The City Planning Department provided a residential density based on the GIS information of existing residential developments in Shelbyville. Developable areas of each parcel were calculated with regard to flood plain and typical site infrastructure areas (i.e., retention areas, street right of ways, etc.). The remaining columns identify the 10-year growth potential (as a percentage) and the relative number of residential units and populations. The 2010 Census information of 2.28 persons per household was applied to project populations.

City of Shelbyville – Potential Residential Growth Work Sheet

Compiled by: Lehman & Lehman, Inc. including information provided by the City of Shelbyville

City Zoning

Zone	AR	R1LD	R1HD	RM
Units / Ac.	0.05	2.00	4.75	7.00

County Zoning

AG	AZ	RE	R1LD	RMD
0.05	0.20	0.50	2.00	7.00

2010 Census Pop. / Household = 2.28

Updated: 12-Sep-18

Map Parcel ID	Acres (Approx.)	Flood Area	Net Area	Residential Zone	Units per Acre	Potential or Planned Residential Units	Potential Residential Population	Percentage of Development over next 10 Yrs.	Potential 10 Yr. Forecast of Residential Units	Potential 10 Yr. Forecast of Population	Development Location	NOTES
AG2	173.80	15.50	158.30	AG	0.05	8	18	0.00%	0	0	Out of City	
AG3	228.40	74.10	154.30	AG	0.05	8	18	0.00%	0	0	Out of City	
AG4	247.30	0.00	247.30	AG	0.05	12	28	0.00%	0	0	Out of City	
AG5	383.50	0.00	383.50	AG	0.05	19	44	0.00%	0	0	Out of City	
AG6	392.70	0.00	392.70	AG	0.05	20	45	0.00%	0	0	Out of City	
AG10	154.40	0.00	154.40	AG	0.05	8	18	0.00%	0	0	Out of City	
AG11	247.60	20.90	226.70	AG	0.05	11	26	0.00%	0	0	Out of City	
AG12	321.80	44.30	277.50	AG	0.05	14	32	0.00%	0	0	Out of City	
AG13	72.90	0.00	72.90	AG	0.05	4	8	0.00%	0	0	Out of City	
AG14	177.40	78.20	99.20	AG	0.05	5	11	0.00%	0	0	Out of City	
AG15	484.50	39.90	444.60	AG	0.05	22	51	0.00%	0	0	Out of City	
AG18	223.90	75.30	148.60	AG	0.05	7	17	0.00%	0	0	Out of City	
AG19	81.20	38.90	42.30	AG	0.05	2	5	0.00%	0	0	Out of City	
R1LD20	148.70	35.60	113.10	R1LD	2.00	226	516	0.00%	0	0	Out of City	
R1LD21	151.50	9.60	141.90	R1LD	2.00	284	647	0.00%	0	0	Out of City	
R1LD24	14.80	7.70	7.10	R1LD	2.00	14	32	0.00%	0	0	Out of City	
RM26	4.90	0.00	4.90	Industrial	0.00	0	0	0.00%	0	0	In City	Industrial use - No Residential development
AG28	83.30	44.50	38.80	AG	0.05	2	4	0.00%	0	0	Out of City	
R1LD29	103.80	0.00	103.80	R1LD	2.00	208	473	0.00%	0	0	Out of City	
AG30	84.10	0.00	84.10	AG	0.05	4	10	0.00%	0	0	Out of City	
AG31	195.60	2.86	192.74	AG	0.05	10	22	0.00%	0	0	Out of City	
RM35	8.20	0.00	8.20	Industrial	0.00	0	0	0.00%	0	0	In City	Industrial use - No Residential development
R1LD36	15.90	0.00	15.90	R1LD	2.00	32	73	0.00%	0	0	Out of City	
R1LD37	9.50	0.00	38.80	R1LD	2.00	0	0	0.00%	0	0	Out of City	
R1LD38	465.40	0.00	465.40	R1LD	2.00	931	2,122	0.00%	0	0	Out of City	
R1LD39	27.80	5.70	22.10	R1LD	2.00	44	101	0.00%	0	0	Out of City	
AG40	66.40	0.00	66.40	AG	0.05	3	8	0.00%	0	0	Out of City	
AG41	56.50	39.30	17.20	AG	0.05	1	2	0.00%	0	0	Out of City	
AG42	74.70	0.00	74.70	AG	0.05	4	9	0.00%	0	0	Out of City	
AG43	35.00	14.00	21.00	AG	0.05	1	2	0.00%	0	0	Out of City	
R1LD44	65.30	9.90	55.40	R1LD	2.00	111	253	0.00%	0	0	Out of City	
AG45	82.80	49.90	32.90	AG	0.05	2	4	0.00%	0	0	Out of City	
AG46	82.80	0.00	82.80	AG	0.05	4	9	0.00%	0	0	Out of City	
R1LD47	64.10	20.90	43.20	R1LD	2.00	86	197	0.00%	0	0	Out of City	
R1LD48	64.40	0.00	64.40	R1LD	2.00	129	294	0.00%	0	0	Out of City	
R1LD-49	18.80	0.00	18.80	R1LD	2.00	38	86	0.00%	0	0	In City	
R1LD-50	25.20	0.00	25.20	R1LD	2.00	50	115	70.00%	35	80	In City	
R1HD-51	15.60	0.00	15.60	R1HD	4.75	74	169	70.00%	52	118	In City	
AG52	44.40	0.00	44.40	AG	0.05	2	5	0.00%	0	0	Out of City	
AG53	16.70	0.00	16.70	AG	0.05	1	2	0.00%	0	0	Out of City	
R1LD54	75.00	43.80	31.20	R1LD	2.00	62	142	0.00%	0	0	Out of City	
R1LD55	14.40	0.00	14.40	R1LD	2.00	29	66	0.00%	0	0	Out of City	
R1LD56	25.50	3.20	22.30	R1LD	2.00	45	102	0.00%	0	0	Out of City	
IS57	79.00	7.60	71.40	Institutional	0.00	0	0	0.00%	0	0	Out of City	Institutional - No Residential Uses
R1LD-58	14.00	0.00	14.00	R1LD	2.00	28	64	0.00%	0	0	In City	
R1LD59	66.40	34.80	31.60	R1LD	2.00	63	144	0.00%	0	0	Out of City	
R1LD60	35.10	25.70	9.40	R1LD	2.00	19	43	0.00%	0	0	Out of City	
R1HD61	19.90	0.00	19.90	R1HD	4.75	95	216	0.00%	0	0	In City	
R1LD62	112.60	0.00	112.60	R1LD	2.00	225	513	0.00%	0	0	Out of City	
RMD-63	128.70	12.90	115.80	R1LD	2.00	232	528	0.00%	0	0	Out of City	
RMD-64	53.30	7.60	45.70	R1LD	2.00	91	208	0.00%	0	0	Out of City	
R1LD-65	39.70	0.00	39.70	R1LD	2.00	79	181	15.00%	12	27	In City	
R1LD-66	8.60	0.00	8.60	R1LD	2.00	17	39	35.00%	6	14	In City	
R1HD-67	6.40	0.00	6.40	R1HD	4.75	30	69	35.00%	11	24	Out of City	
R1HD-68	13.30	0.00	13.30	R1HD	4.75	63	144	70.00%	44	101	In City	
MFHD69	4.00	0.00	4.00	RM	7.00	28	64	70.00%	20	45	In City	

Table 1 – Shelbyville Potential Residential Growth Work Sheet of Undeveloped Land Parcels

Shelbyville Recreation Zone Improvement Plan Study

City of Shelbyville – Potential Residential Growth Work Sheet

Compiled by: Lehman & Lehman, Inc. including information provided by the City of Shelbyville

City Zoning

Zone	AR	R1LD	R1HD	RM
Units / Ac.	0.05	2.00	4.75	7.00

County Zoning

AG	A2	RE	R1LD	RMD
0.05	0.20	0.50	2.00	7.00

2010 Census Pop. / Household = 2.28

Updated: 12-Sep-18

Map Parcel ID	Acres (Approx.)	Flood Area	Net Area	Residential Zone	Units per Acre	Potential or Planned Residential Units	Potential Residential Population	Percentage of Development over next 10 Yrs.	Potential 10 Yr. Forecast of Residential Units	Potential 10 Yr. Forecast of Population	Development Location	NOTES
MFHD70	27.90	0.00	27.90	RM	7.00	195	445	70.00%	137	312	Out of City	
R1LD71	47.70	0.00	47.70	R1LD	2.00	95	218	70.00%	67	152	Out of City	
R1LD72	80.20	0.00	80.20	R1LD	2.00	160	366	0.00%	0	0	Out of City	
AG73	53.90	0.00	53.90	AG	0.05	3	6	0.00%	0	0	Out of City	
AG74	42.50	0.00	42.50	AG	0.05	2	5	0.00%	0	0	Out of City	
AG75	47.90	0.00	47.90	AG	0.05	2	5	0.00%	0	0	Out of City	
AG76	44.50	0.00	44.50	AG	0.05	2	5	0.00%	0	0	Out of City	
AG77	13.70	0.00	13.70	AG	0.05	1	2	0.00%	0	0	Out of City	
AG78	23.80	0.00	23.80	AG	0.05	1	3	0.00%	0	0	Out of City	
R1LD79	119.00	0.00	119.00	R1LD	2.00	238	543	0.00%	0	0	Out of City	
RMD-80	173.70	0.00	173.70	RMD	7.00	1,216	2,772	0.00%	0	0	Out of City	
PD81	61.30	0.00	61.30	PD	0.00	115	262	0.00%	0	0	In City	MOVE THIS TO DEVELOPMENT TABLE – This a Named Development and should go on other list??? 315 units less 200 existing
R1HD82	25.80	0.00	25.80	R1HD	4.75	123	279	0.00%	0	0	In City	
R1LD83	32.70	0.00	32.70	R1LD	2.00	65	149	0.00%	0	0	In City	
R1LD84	7.30	0.00	7.30	R1LD	2.00	15	33	0.00%	0	0	Out of City	
R1LD85	29.40	0.00	29.40	R1LD	2.00	59	134	0.00%	0	0	Out of City	
R1LD86	46.40	0.00	46.40	R1LD	2.00	93	212	0.00%	0	0	Out of City	
R1LD87	46.00	0.00	46.00	R1LD	2.00	92	210	0.00%	0	0	Out of City	
R1LD88	3.70	0.00	3.70	R1LD	2.00	7	17	0.00%	0	0	Out of City	
R1LD89	38.90	0.00	38.90	R1LD	2.00	78	177	0.00%	0	0	Out of City	
AG90	40.90	0.00	40.90	AG	0.05	2	5	0.00%	0	0	Out of City	
AG91	40.90	0.00	40.90	AG	0.05	2	5	0.00%	0	0	Out of City	
AG92	39.20	0.00	39.20	AG	0.05	2	4	0.00%	0	0	Out of City	
AG93	93.80	0.00	93.80	AG	0.05	5	11	0.00%	0	0	Out of City	
AG94	13.10	0.00	13.10	AG	0.05	1	1	0.00%	0	0	Out of City	
R1LD95	165.80	0.00	165.80	R1LD	2.00	332	756	0.00%	0	0	Out of City	
RMD-96	11.20	0.00	11.20	RMD	7.00	78	179	0.00%	0	0	Out of City	
RMD-97	83.30	0.00	83.30	RMD	7.00	583	1,329	0.00%	0	0	Out of City	
RMD-98	15.80	0.00	15.80	RMD	7.00	111	252	0.00%	0	0	Out of City	
RMD-99	20.00	0.00	20.00	RMD	7.00	140	319	15.00%	21	48	Out of City	
RMD-100	10.80	0.00	10.80	RMD	7.00	76	172	15.00%	11	26	Out of City	
R1LD-101	29.50	0.00	29.50	R1LD	2.00	59	135	15.00%	9	20	Out of City	
R1LD-102	7.70	0.00	7.70	R1LD	2.00	15	35	15.00%	2	5	Out of City	
R1LD-103	66.40	0.00	66.40	R1LD	2.00	133	303	45.00%	60	136	In City	
RMD-104	13.20	0.00	13.20	RMD	7.00	92	211	0.00%	0	0	Out of City	
R1LD105	18.50	0.00	18.50	R1LD	2.00	37	84	0.00%	0	0	Out of City	
RMD-106	11.20	0.00	11.20	RMD	7.00	78	179	0.00%	0	0	Out of City	
R1LD107	101.00	0.00	101.00	R1LD	2.00	202	461	35.00%	71	161	In City	
RMD-108	50.90	0.00	50.90	RMD	7.00	356	812	0.00%	0	0	In City	
RMD-109	38.00	0.00	38.00	RMD	7.00	266	606	65.00%	173	394	In City	
RMD-110	50.60	0.00	50.60	RMD	7.00	354	808	0.00%	0	0	Out of City	
RMD-111	10.00	0.00	10.00	RMD	7.00	70	160	0.00%	0	0	Out of City	
AG112	105.50	0.00	105.50	AG	0.05	5	12	0.00%	0	0	Out of City	
AG113	98.20	0.00	98.20	AG	0.05	5	11	0.00%	0	0	Out of City	
AG114	125.60	0.00	125.60	AG	0.05	6	14	0.00%	0	0	Out of City	
AG115	75.50	0.00	75.50	AG	0.05	4	9	0.00%	0	0	Out of City	
R1LD116	39.90	0.00	39.90	R1LD	2.00	80	182	0.00%	0	0	Out of City	
R1LD117	42.70	0.00	42.70	R1LD	2.00	85	195	0.00%	0	0	Out of City	
R1LD118	31.30	0.00	31.30	R1LD	2.00	63	143	0.00%	0	0	Out of City	
R1LD119	130.20	0.00	130.20	R1LD	2.00	260	594	0.00%	0	0	Out of City	
R1LD120	68.30	0.00	68.30	R1LD	2.00	137	311	0.00%	0	0	Out of City	
R1LD121	99.00	0.00	99.00	R1LD	2.00	198	451	0.00%	0	0	Out of City	
IS122	11.50	0.00	11.50	Institutional	0.00	0	0	0.00%	0	0	In City	Institutional - No Residential Uses
R1LD123	45.10	0.00	45.10	R1LD	2.00	90	206	0.00%	0	0	Out of City	
RMD-124	149.90	0.00	149.90	RMD	7.00	1,049	2,392	0.00%	0	0	Out of City	
R1LD-125	7.84	0.00	7.84	R1LD	2.00	16	36	0.00%	0	0	Out of City	
AG126	96.20	0.00	96.20	AG	0.05	5	11	0.00%	0	0	Out of City	
AG127	250.50	0.00	250.50	AG	0.05	13	29	0.00%	0	0	Out of City	
AG128	46.00	0.00	46.00	AG	0.05	2	5	0.00%	0	0	Out of City	
AG129	19.80	0.00	19.80	AG	0.05	1	2	0.00%	0	0	Out of City	
AG130	225.40	0.00	225.40	AG	0.05	11	26	0.00%	0	0	Out of City	
AG131	79.70	0.00	79.70	AG	0.05	4	9	0.00%	0	0	Out of City	
AG132	43.20	0.00	43.20	AG	0.05	2	5	0.00%	0	0	Out of City	
AG133	14.40	0.00	14.40	AG	0.00	0	0	0.00%	0	0	Out of City	
AG134	28.50	6.30	22.20	AG	0.05	1	3	0.00%	0	0	Out of City	
AG135	114.90	11.80	103.10	AG	0.05	5	12	0.00%	0	0	Out of City	
R1LD136	8.60	0.00	8.60	R1LD	2.00	17	39	0.00%	0	0	Out of City	
AG137	58.90	0.00	58.90	AG	0.05	3	7	0.00%	0	0	Out of City	
R1LD138	276.20	0.00	276.20	R1LD	2.00	552	1,259	0.00%	0	0	Out of City	

Table 1 (continued) – Shelbyville Potential Residential Growth Work Sheet of Undeveloped Land Parcels

Shelbyville Recreation Zone Improvement Plan Study

City of Shelbyville – Potential Residential Growth Work Sheet

Compiled by: Lehman & Lehman, Inc. including information provided by the City of Shelbyville

City Zoning

Zone	AR	R1LD	R1HD	RM
Units / Ac.	0.05	2.00	4.75	7.00

County Zoning

AG	A2	RE	R1LD	RMD
0.05	0.20	0.50	2.00	7.00

2010 Census Pop. / Household = 2.28

Updated: 12-Sep-18

Map Parcel ID	Acres (Approx.)	Flood Area	Net Area	Residential Zone	Units per Acre	Potential or Planned Residential Units	Potential Residential Population	Percentage of Development over next 10 Yrs.	Potential 10 Yr. Forecast of Residential Units	Potential 10 Yr. Forecast of Population	Development Location	NOTES
R1LD139	36.80	0.00	36.80	R1LD	2.00	74	168	0.00%	0	0	Out of City	
R1LD140	50.20	0.00	50.20	R1LD	2.00	100	229	0.00%	0	0	Out of City	
R1LD141	12.80	0.00	12.80	R1LD	2.00	26	58	0.00%	0	0	Out of City	
R1LD142	28.10	0.00	28.10	R1LD	2.00	56	128	0.00%	0	0	Out of City	
R1LD143	109.60	0.00	109.60	R1LD	2.00	219	500	0.00%	0	0	Out of City	
R1LD144	14.70	0.00	14.70	R1LD	2.00	29	67	0.00%	0	0	Out of City	
R1LD145	123.80	0.00	123.80	R1LD	2.00	248	565	0.00%	0	0	Out of City	
AG146	151.80	0.00	151.80	AG	0.05	8	17	0.00%	0	0	Out of City	
AG147	329.50	133.60	195.90	AG	0.05	10	22	0.00%	0	0	Out of City	
AG148	42.00	14.40	27.60	AG	0.05	1	3	0.00%	0	0	Out of City	
AG149	137.60	0.00	137.60	AG	0.05	7	16	0.00%	0	0	Out of City	
R1LD150	82.80	0.00	82.80	R1LD	2.00	166	378	0.00%	0	0	Out of City	
R1LD151	42.90	0.00	42.90	R1LD	2.00	86	196	0.00%	0	0	Out of City	
R1LD152	149.70	0.00	149.70	R1LD	2.00	299	683	0.00%	0	0	Out of City	
AG153	124.80	0.00	124.80	AG	0.05	6	14	0.00%	0	0	Out of City	
TOTALS	11,539.54	928.76	10,640.08	---	---	13,014	29,671	5.61%	730	1,664		

Table 1 (continued) – Shelbyville Potential Residential Growth Work Sheet of Undeveloped Land Parcels

Similarly, **Table 2** identifies the existing, or planned residential developments within the City. These existing subdivisions currently contain vacant lots for development. The City provided this inventory information to the Consultant for inclusion with this analysis. In the same fashion as the analysis in **Table 1** assumptions were made on these developments' 10-year build out.

City of Shelbyville – Existing Residential Developments with Remaining Growth

9/11/18

2010 Census Pop. / Household = 2.28

Compiled by: Lehman & Lehman, Inc. from information provided by City of Shelbyville

Development's Name	Total Planned Residential Units	Existing Residential Units	Assumed Residential Population	Remaining Residential Units	Potential Population Growth	Assumed 10 Yr. Buildout	Applied 10 Yr. Units Growth	Applied 10 Yr. Population Growth	NOTES
Twelve Oaks	93	82	212	11	25	100%	11	25	
Twin Lakes Estates, Section 1	41	28	93	13	30	100%	13	30	
Twin Lakes Village, Section 1	32	30	73	2	5	100%	2	5	
Central Park	403	389	919	14	32	100%	14	32	
Clearview, Section 8	56	18	128	38	87	75%	29	65	
Clearview, Section 7	38	34	87	4	9	100%	4	9	
Clearview, Section 6	25	22	57	3	7	100%	3	7	
Countryside	228	61	520	167	381	25%	42	95	
Trotter's Chase	44	43	100	1	2	100%	1	2	
Trotter's Chase Condos, Section 2	44	20	100	24	55	100%	24	55	
Heartland Crossing	48	12	109	36	82	100%	36	82	
Foxridge	24	16	55	8	18	100%	8	18	
Twin Lakes Estates, Section 2, 3, and 4	78	0	178	78	178	80%	62	142	
TOTALS	1,154	755	2,631	399	910	62.32%	249	567	

Table 2 – Shelbyville Potential Residential Growth Work Sheet of Existing Developments

Shelbyville Recreation Zone Improvement Plan Study

Potential Residential Growth Summary Forecast

From the analysis and work sessions with the Planning Staff of the City the following is the projection of residential growth over the next 10 years. Also, it should be noted that the assumed population at the end of 2018 (19,070 persons) was factored by the Planning Staff and provided to the Consultant. The findings indicate that the City will grow, in population, by 2,231 by the year 2028 for a total population of 21,301. **Table 3** below highlights this summary information.

City of Shelbyville – Potential Residential Growth Summary

Compiled by: Lehman & Lehman, Inc. including information provided by the City of Shelbyville

Summary of Growth within Existing Developments:	Remaining Residential Units	Potential Population Growth		Applied 10 Yr. Units Growth	Applied 10 Yr. Population Growth	10 Yr. Buildout Percentage
Summary of Totals (existing developments):	399	910		249	567	62.32%
Totals of Growth from New Development Parcels:	13,014	29,671		730	1,664	5.61%
TOTALS:	13,413	30,581		979	2,231	7.30%
Existing Population (2018):		19,070			19,070	
Potential Future Population:		49,651			21,301	

Table 3 – Potential Residential Growth Summary



Shelbyville Recreation Zone Improvement Plan Study

Figure 3 illustrates the historic data of annual residential building permits (by housing type) for the last 14 years along with a trend forecast from that time period.

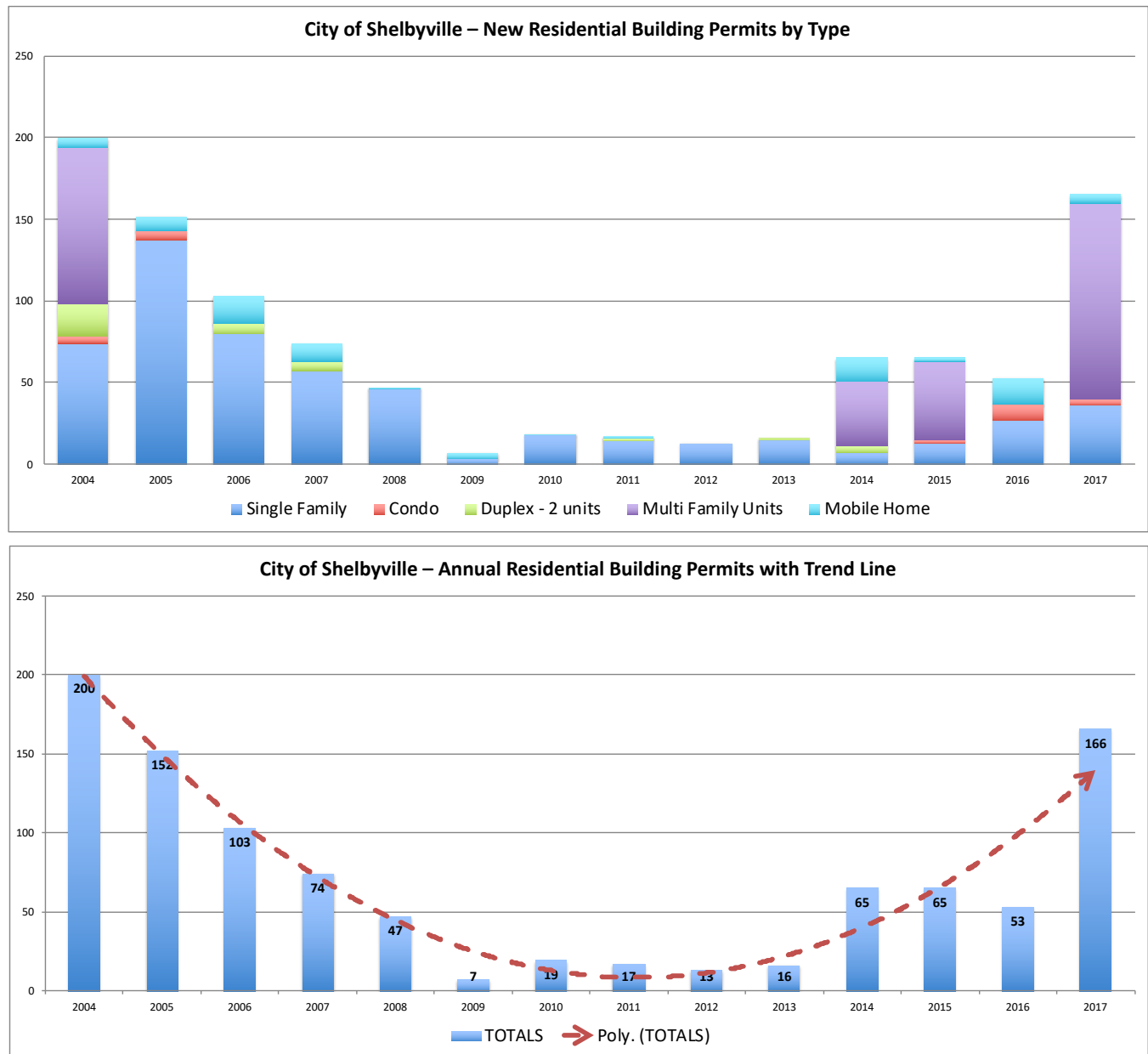


Figure 3 – Annual Residential Building Permits from 2004-2017 for City of Shelbyville

Source: City of Shelbyville

Expectations of Population Growth / Residential Building Permit Projections

From the previous analysis the population growth forecast over the next 10 years is tabulated in the following tables and includes projected new residential building permits applying the 2.28 persons per household established in 2010 Census. The following **Table 4** illustrates the historical population growth over the previous decades and forecasts of population growth over the next 10-year period.

City of Shelbyville Population

31-Oct-18

Current and Projected – All Development Potential

Census of Persons per Household = **2.28**

	2000	2010	2018	2019	2020	2021
Total City of Shelbyville	18,130	19,191	19,070	19,184	19,328	19,522
Annual Growth Rate (Est.)				0.60%	0.75%	1.00%
Households (at 2.28 / house)	7,952	8,417	8,364	8,414	8,477	8,562
Total New Households				50	63	85
Growth / Year (Persons)				114	144	193

	2022	2023	2024	2025	2026	2027	2028
Total City of Shelbyville	19,736	19,963	20,203	20,455	20,721	21,001	21,301
Annual Growth Rate (Est.)	1.10%	1.15%	1.20%	1.25%	1.30%	1.35%	1.43%
Households (at 2.28 / house)	8,656	8,756	8,861	8,972	9,088	9,211	9,343
Total New Households	94	100	105	111	117	123	132
Growth Per Year (Persons)	215	227	240	253	266	280	300

Population Scenario		
Year	New Building Permits	New Pop.
2019	50	114
2020	63	144
2021	85	193
2022	94	215
2023	100	227
2024	105	240
2025	111	253
2026	117	266
2027	123	280
2028	132	300
Total:	979	2,231
Average:	98	223

1.11% = assumed average annual growth rate

Table 4 – Current and Projected Population and Building Permit Growth

Included in the above table is a projected annual growth rate for the Impact Zone. This growth rate percentage factors in the relative flat growth the state, and country, is experiencing in the housing market. It does project an annual growth rate that best matches the growth strategies in the previous section of this study. The overall growth projection is 979 residential units (2,231 persons) with an annual ten-year growth rate of 1.11%. This growth assumes that other development infrastructure components (public utilities, roads, drainage, etc.) will be implemented in advance, or in conjunction with, the residential developments.

Note that since Recreation Impact Fees cannot be collected until six months after the ordinance is approved the revenue calculations for building permits will not include those projected in the six months after the ordinance approval.



Shelbyville Recreation Zone Improvement Plan Study

Following is **Figure 4** that illustrates the historical growth of the City and the projected growth over the coming ten years.

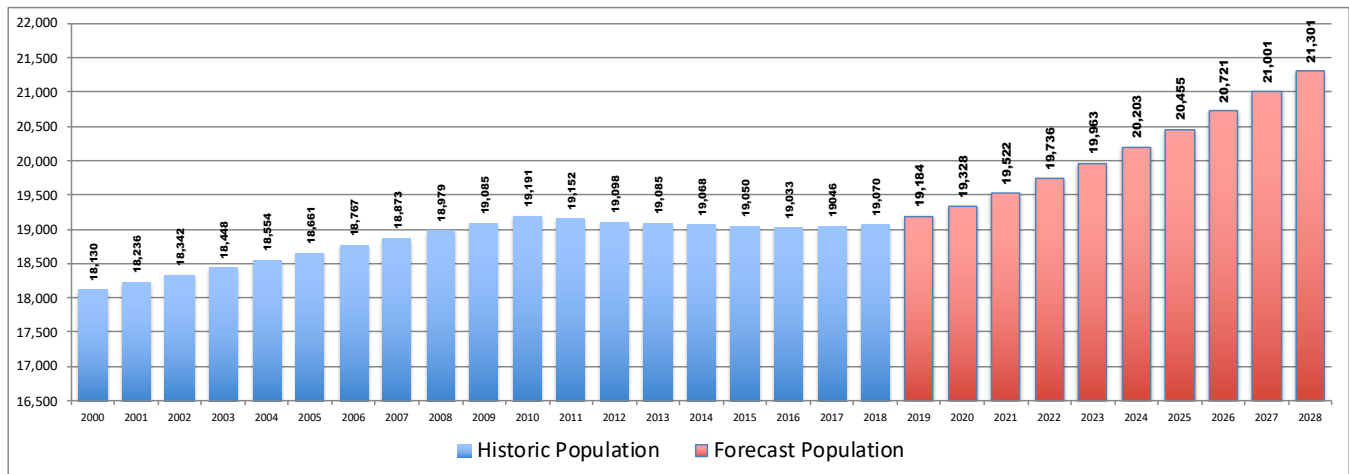


Figure 4 – Historic and Projected Population of the City of Shelbyville

Existing Park Land Facilities

Park Sites and Acreage Needed

Typically Park Master Plans categorize parks as block, neighborhood, community or special parks, depending on the size of the park and the population that the park is intended to serve. The park types can also be defined by not only the acres but also by the components found in the parks themselves. The following definitions are consistent with those found in the current Park and Recreation industry.

Definitions:

- **Block Park** – A small park located within residential areas that serves concentrated or limited population. Typical size is less than 5 acres of land.
- **Neighborhood Park** – An area that provides recreation opportunities within walking distance of residents. Typical size is between 5 and 50 acres of land.
- **Community Park** – An area that provides recreation opportunities for two or more neighborhoods. Typical size is between 51 and 400 acres of land.
- **Special Park** – An area that provides recreation resources and opportunities to all local communities as well as those within the local region. This park type could be a preservation area as well as linear trail and greenway system. Typical size is 100+ acres of land.

Shelbyville Recreation Zone Improvement Plan Study

Existing Parks Facilities

Figure 7 illustrates the locations of the existing parks and trails / greenways within the Study Area of the City of Shelbyville.

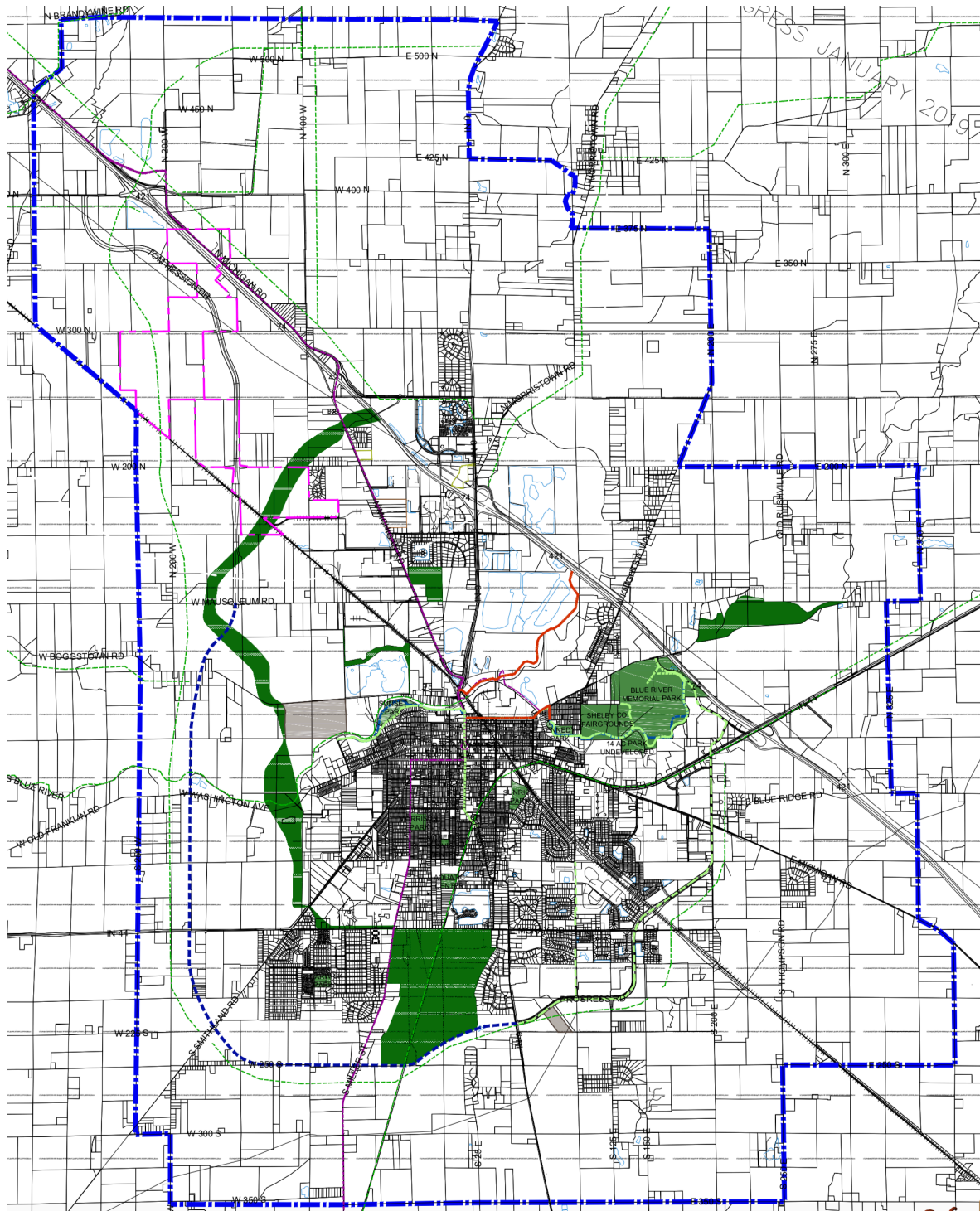


Figure 7 – Park Facilities System – City of Shelbyville

Shelbyville Recreation Zone Improvement Plan Study

Table 5, Park Site Inventory, provides an inventory of the parks, their acres, type and location within the existing impact zone. The map below illustrates the locations of the park sites within the City.

Shelbyville – Park Inventory 1/4/19

Park Department Facilities	Acres	Park Type
Clearwick Park	8.00	Neighborhood
Kennedy Park	10.00	Neighborhood
Sunrise Park	10.00	Neighborhood
Morrison Park	12.00	Neighborhood
Tindall Park	0.30	Block
Sunset Park	16.00	Neighborhood
Pioneer Park	4.00	Neighborhood
Blue River Memorial Park	186.00	Community
Meridian Park Aquatic Center	10.00	Neighborhood
Porter Center	6.00	Neighborhood
Carl McNeely Civic Center	2.25	Special
Big Blue River Trailhead	1.25	Special
Weaver Property (Undeveloped)	13.99	Community
Trails and Greenways	17.64	Special
Total	297.43	

Park Type	Acres	Percentage
Community Park Acres	199.99	67.24%
Neighborhood Park Acres	76.00	25.55%
Block Park Acres	0.30	0.10%
Special / Linear Park Acres	21.14	7.11%
TOTALS	297.43	100.00%

Table 5 – Park Site Inventory

There are standards that exist for the number of acres of various park/open space lands for each of the above park types. The total existing City park acreage (*not including parks in existing subdivisions, open space on school properties*) equals 297.43 acres. There are two reasons that existing recreation components and parks found in existing subdivisions are not included in this tally: 1) these recreation and open spaces are not part of the City's Park System and 2) these facilities were sized and developed for use by the residents of that particular development and were not intended for usage by the overall community.

When applying the current population against the acreage inventory it calculates out to a current level of service of 15.50 acres per 1,000 persons (refer to **Table 6**).

With the recent addition of park properties including Blue River Memorial Park and the Weaver Property in recent years the Advisory Committee recommended, for the purpose of this study, that the Shelbyville Community Level of Service for Park and Open Space land be established at 12.00 acres per 1,000 persons. The Committee also felt that this less aggressive level of service step of increase would allow the City to have financial resources available for the development of various park amenities without a burden of a higher standard.

The following **Table 6** illustrates the surpluses and deficiencies of land for park and open space purposes for one Impact Zone. The upper portion of the table illustrates how each park type acres would be analyzed individually. Note that the standards used, in Column D, are typical for communities in Indiana. This standard combination equals 8.00 acres / 1,000 persons. The bottom portion of the table indicates the Shelbyville Community Level of Service of 12.00 acres / 1,000. Based on the current 2018 inventory and applying the 12.00 acres / 1,000 persons (the 2018 population) there will be a surplus of 67.21 acres in 2019. And, in order to meet the standard for the projected population there will be a need for an additional 25.40 acres of park and open space in 2028.

Shelbyville Recreation Zone Improvement Plan Study

Shelbyville – Recreation Impact Fee – Park System Analysis

LAND INVENTORY – CURRENT LEVEL OF SERVICE

4-Jan-19

Town Wide Analysis		Estimated 2018 and Projected Populations =					
		19,184					
		21,301					
A	B	C	D	E	F	G	H
Park Type	Typical Park Size (Acres)	Total Existing Acreage	Acres Standards / 1,000	Current Acreage Stds./1,000	Current Acreage Needs	2018 Surplus or Deficiency	2027 Needed if current deficiency IS met
Block Park	1 to 5	0.30	0.50	0.02	9.59	(9.29)	(1.06)
Neighborhood Park	4 to 15	76.00	1.50	3.96	28.78	47.22	(3.18)
Community Park	10 to 70	199.99	5.00	10.42	95.92	104.07	(10.58)
Special / Linear Parks	2.00	21.14	1.00	1.10	19.18	1.95	(2.12)
Total Surplus or Deficiency		297.43	8.00	15.50	153.48	143.95	(16.94)

Data updated from the Park and Recreation Master Plan.

Using the Current Land Inventory as the Standard for Park Land and Open Space the Acres Standard per 1,000 persons would be (includes current population) =	15.50
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LAND INVENTORY – COMMUNITY LEVEL OF SERVICE

Shelbyville Acres Standard						2027 Pop.
Populations =						21,301
I	J	K	L	M	N	O
Park Type	Total Existing Acreage	Community Level of Service - Acres Standards / 1,000	2018 Acreage Needs	2018 Surplus or Deficiency	2027 Acreage Needs	2027 Needed if current deficiency IS met
Total Surplus or Deficiency	297.43	12.00	230.21	67.21	255.62	(25.40)

Suggestion standard acres / 1,000 persons -----^

Table 6 – Land Inventory – Current Level of Service and Community Level of Service

In many communities the utilization of school sites and facilities is factored in to help meet future park needs reducing both the total cost of the park system and the amount of the impact fee needed to help pay for the system. Such strategies, involving the municipality and School Districts, have worked cooperatively with each other, developing land jointly and sharing facilities whenever possible for the mutual benefit of the municipality and the School District. Such intergovernmental cooperation has led to the development of schools and parks adjacent to one another. In this way, for example, the same ball field might be used during school hours for physical education classes and during non-school hours for City-sponsored league play.

This collaborative strategy model should be explored by the City and the School District to determine how best to move forward. The City and the School Board should give consideration in the future to the establishment of a formal *Memoranda of Understanding* for shared uses of sites and facilities for each entity's programming and public use. This will have a significant impact on the community levels of service for the Shelbyville's community. It is also important to note that in order to satisfy requirements in the State impact fee legislation, the City would not be able to use money collected from the proposed impact fee to help pay for acreage needed to overcome a current deficiency. With respect to land acquisition, money generated by the impact fee can be used only toward acquiring the various acreage needed to meet the future needs resulting from projected population growth.

Existing Infrastructure of Recreation Facilities

Park Facilities and Current Level of Service [IC 36-7-4-1318 (b)(2)]

In order to know whether existing park and recreation facilities are adequate to meet the needs of the current population, the City established standards for the amount of various types of facilities needed to serve a given amount of population. The desirable local standards for the various types of facilities are stated in the column titled “Shelbyville Community Level of Service” in the following table.

For example, the City has established a standard for multi-purpose fields that calls for one (1) multi-purpose field for every 8,000 persons. Refinements were given on the standards for each recreation facility component from that of the Park Master Plan Update. The inventory of recreation components found within the Park System and those found in the community as a whole can be found in **Appendix E: Park and Recreation Infrastructure Inventory**. [IC 36-7-4-1318 (b)(1)]

In tallying the recreation facilities, the Advisory Committee included both the facilities of the Shelbyville Parks and Recreation as well as those other recreation facilities serving the public found within the community. These two inventories are tallied and included in **Table 7** [IC 36-7-4-1318 (b)(2)]. The recreation facility standards were updated from the previous five-year master plan. New standards were established for the additional recreation facilities added to this list. State and/or National standards were used as a reference, but much analysis was done as to the current inventory and the community needs for each of the facilities.

The application of the local standard to the current population enables the current need to be established and surpluses or deficiencies calculated. The various columns in the top of **Table 7** show:

1. *The recreation facility component being considered (Column A)*
2. *The standard for the number of persons that each facility should serve (Column B)*
3. *Total existing number of each type of recreational facility (i.e. baseball fields, softball fields, basketball courts, tennis courts, etc.) in both the Park System as well as public facilities in the community (Columns E and F)*
4. *The needed number of each facility type based on application of the standard to the present population (Column H)*
5. *The surplus or deficiency of each facility relative to current population, based on the applicable standard (Column J)*

For example, referring to multi-purpose fields in **Table 7**, there are three (3) multi-purpose fields as part of the Park System (Column E) and an additional one (1) multi-purpose fields in the community (Column F). In meeting the current Community Level of Service, the Community should have 2.40 multi-purpose fields (Column H). If you applied only the park system’s inventory there would be a surplus of 0.60 multi-purpose fields. Yet, there is a total of 4.00 multi-purpose fields that exist in the community (adding together the park system and the community inventories – Column G). This analysis will be important in applying priorities to each of the recreation components.

The Consultant worked with the Park Staff in establishing priorities of recreation components. These priorities were established based on the Park Department’s perception, user feedback from the community, etc. along with which components might best benefit in the inclusion of the Recreation Impact Fees. The priority ranking was “A”-Top Priority, “B”-High Priority, and “C”-Low Priority. The Advisory Committee and Park Department selected four (4) infrastructure components as the “A” priorities that were Softball Diamonds, Park Shelters, Trails and Park Acres. Those priorities are illustrated in the shaded lines in the following table.

The following **Table 7** represents the Facility Inventory and Needs projections for the current and future

Shelbyville Recreation Zone Improvement Plan Study

populations. This table is the inventory and needs for the Impact Zone and it indicates the Shelbyville Recreation Standards, the current number of facility components, the needed component number based on both current and future populations and the surplus or deficiency of the recreation component. This table also includes the parkland (acres) component.

Shelbyville – Recreation Impact Fee – Park System Analysis

FACILITY INVENTORY AND NEEDS – One Impact Zone Area

4-Jan-19

One Impact Zone Area							19,184 = Estimated 2019 Pop.				21,301 = Projected 2028 Pop.				
A	B	C	D	E	F	G	H	I	J	K	L	M	N	TENTATIVE PRIORITIES	
Facility	Shelbyville Community Level of Service	Community Level of Service / 1,000 Pop.	Current Level of Service / 1,000 Pop.	Current Facilities in the Park Dept.*	Current Facilities within the Comm.	Total Inventory of Facilities	Community Level of Service (2019 pop.)	2019 Surplus or Deficiency	Current Deficiencies (Community Level of Service)	2019 Surplus or Deficiency (CLS) Factor All Facilities	Community Level of Service 2028 Needs	2028 Needed if current deficiency is met	2028 Needs (Community Level of Service)		
Baseball Diamonds	1/10,000	0.10	0.00	0.00	2.00	2.00	1.92	(1.92)	1.92	0.08	2.13	(0.21)	0.21	A	
Softball Diamonds	1/2,000	0.50	0.42	8.00	2.00	10.00	9.59	(1.59)	1.59	0.41	10.65	(1.06)	1.06		
Multi Purpose Fields	1/8,000	0.13	0.16	3.00	1.00	4.00	2.40	0.60	0.00	1.60	2.66	0.34	0.00		
Soccer Fields	1/4,000	0.25	0.52	10.00	1.00	11.00	4.80	5.20	0.00	6.20	5.33	4.67	0.00		
Tennis Courts	1/10,000	0.10	0.10	2.00	0.00	2.00	1.92	0.08	0.00	0.08	2.13	(0.13)	0.13		
Running / Walking Track (Comm)	1/80,000	0.01	0.00	0.00	8.00	8.00	0.24	(0.24)	0.24	7.76	0.27	(0.03)	0.03		
Basketball Goals (outdoors)	1/5,000	0.20	0.21	4.00	1.00	5.00	3.84	0.16	0.00	1.16	4.26	(0.26)	0.26		
Volleyball Courts (outdoors)	1/15,000	0.07	0.05	1.00	0.00	1.00	1.28	(0.28)	0.28	(0.28)	1.42	(0.14)	0.14		
Skate/Bike Park (Neighborhood)	1/40,000	0.03	0.00	0.00	0.00	0.00	0.48	(0.48)	0.48	(0.48)	0.53	(0.05)	0.05		
Climbing / Challenge Elements	1/20,000	0.05	0.00	0.00	0.00	0.00	0.96	(0.96)	0.96	(0.96)	1.07	(0.11)	0.11		
Park Shelters	1/2,500	0.40	0.36	7.00	0.00	7.00	7.67	(0.67)	0.67	(0.67)	8.52	(0.85)	0.85	A	
Park Restrooms	1/4,000	0.25	1.04	20.00	0.00	20.00	4.80	15.20	0.00	15.20	5.33	14.67	0.00		
Interpretive Center	1/30,000	0.03	0.00	0.00	0.00	0.00	0.64	(0.64)	0.64	(0.64)	0.71	(0.07)	0.07		
Environmental Center	1/50,000	0.02	0.00	0.00	1.00	1.00	0.38	(0.38)	0.38	0.62	0.43	(0.04)	0.04		
Outdoor Entertainment Venue	1/60,000	0.02	0.00	0.00	0.00	0.00	0.32	(0.32)	0.32	(0.32)	0.36	(0.04)	0.04		
Recreation Centers (Neighborhood)	1/80,000	0.01	0.00	0.00	0.00	0.00	0.24	(0.24)	0.24	(0.24)	0.27	(0.03)	0.03		
Playgrounds (Comm./Destination)	1/15,000	0.07	0.05	1.00	0.00	1.00	1.28	(0.28)	0.28	(0.28)	1.42	(0.14)	0.14		
Playgrounds (Neighborhood)	1/30,000	0.03	0.36	7.00	3.00	10.00	0.64	6.36	0.00	9.36	0.71	6.29	0.00		
Skating Rinks (hockey)	1/100,000	0.01	0.00	0.00	0.00	0.00	0.19	(0.19)	0.19	(0.19)	0.21	(0.02)	0.02		
Skating Area (non-hockey)	1/80,000	0.01	0.00	0.00	0.00	0.00	0.24	(0.24)	0.24	(0.24)	0.27	(0.03)	0.03		
Swim. Pool / Aquatics Facilities	1/30,000	0.03	0.05	1.00	2.00	3.00	0.64	0.36	0.00	2.36	0.71	0.29	0.00		
Sprayground / SplashPad	1/25,000	0.04	0.05	1.00	0.00	1.00	0.77	0.23	0.00	0.23	0.85	0.15	0.00		
Golf Course 18-hole	1/50,000	0.02	0.00	0.00	0.00	0.00	0.38	(0.38)	0.38	(0.38)	0.43	(0.04)	0.04		
Driving Range	1/70,000	0.01	0.00	0.00	0.00	0.00	0.27	(0.27)	0.27	(0.27)	0.30	(0.03)	0.03		
Disc Golf (18-holes)	1/30,000	0.03	0.00	0.00	0.00	0.00	0.64	(0.64)	0.64	(0.64)	0.71	(0.07)	0.07		
Dog Park Area	1/50,000	0.02	0.00	0.00	0.00	0.00	0.38	(0.38)	0.38	(0.38)	0.43	(0.04)	0.04		
Maintenance Facilities (Hub)	1/30,000	0.03	0.05	1.00	0.00	1.00	0.64	0.36	0.00	0.36	0.71	0.29	0.00		
Maintenance Facilities (Satellite)	1/30,000	0.03	0.00	0.00	0.00	0.00	0.64	(0.64)	0.64	(0.64)	0.71	(0.07)	0.07		
Multi-use / Nature Pathways (miles)	1 mile / 2,250	0.44	0.47	9.02	0.00	9.02	8.53	0.49	0.00	0.49	9.47	(0.45)	0.45	A	
Park / Open Space Acres	12.0 ac. / 1,000	12.00	15.50	297.43	0.00	297.43	230.21	67.21	0.00	67.21	255.62	(25.40)	25.40	A	
* Current Facilities Data updated from information provided by the Park Department.															
DEVELOPMENT PRIORITY:														Top Priority	A
														High Priority	B
														Low Priority	C

Table 7 – Facilities Inventory and Needs

The Advisory Committee reviewed and established new standards, or Community Level of Service, to reflect the desired needs of the various recreational infrastructure components. These standards are based on current assumptions of the needs of the community, so they need to be reviewed annually by the Park Board. Current facilities not part of the Park System but found within the zone were also noted. Many of these non-park system components serve a need in the level of service. Therefore, the standards used reflect the impact of all recreation infrastructure components to the level of service found within the community. Again, only the inventory of the Park System was used in determining the current deficiencies and future needs reflected in the Recreation Impact Fee analysis.

As was suggested with the park land inventory, it is again recommended that the City, the School Board and other recreation providers give consideration in the establishment of formal Memoranda of Understanding for shared uses of sites and facilities for each entity's programming and public use. This will have a significant impact on the community levels of service for the Shelbyville's community. It was noted, in this study, that many of the school facilities used by Shelbyville students are located outside of the City's boundaries. Such collaboration between the School District and the City may best be achieved with school facilities within the Shelbyville Planning District.

For the purposes of this study analysis the current and future needs and their related costs were leveraged using the prioritized recreation components.

Shelbyville Recreation Zone Improvement Plan Study

Park Facilities – Community Level of Service [IC 36-7-4-1318 (b)(3)]

Summary of Park Facilities Analysis

The number and types of recreational facilities needed currently and in the future were determined using the standards established earlier in the plan and applied to only those components found within the Park System. To overcome current deficiencies the City needs to add the recreation components listed under current deficiencies over the next ten-year period through funding outside of Recreation Impact Fees. (Note the recreation components have been arranged by priority.)

To meet the 2028 projected growth and factoring in that the current deficiencies will be met, the City will need to add to its Park System the recreation components listed under future needs over the next ten-year period, using RIF proceeds. (Note the components have been listed in priority groupings in *Table 8*.)

Current Deficiencies and Future Needs

Current Deficiencies and Future Needs			
Current Deficiencies (2019)		Future Needs (2028)	
"A" Priorities	Number	"A" Priorities	Number
Softball Diamonds	1.59	Softball Diamonds	1.06
Park Shelters	0.67	Park Shelters	0.85
Multi-use / Nature Pathways (miles)	0.00	Multi-use / Nature Pathways (miles)	0.45
Park / Open Space Acres	0.00	Park / Open Space Acres	25.40
Remaining Priorities	Number	Remaining Priorities	Number
Baseball Diamonds	1.92	Baseball Diamonds	0.21
Multi Purpose Fields	0.00	Multi Purpose Fields	0.00
Soccer Fields	0.00	Soccer Fields	0.00
Tennis Courts	0.00	Tennis Courts	0.13
Running / Walking Track (Comm)	0.24	Running / Walking Track (Comm)	0.03
Basketball Goals (outdoors)	0.00	Basketball Goals (outdoors)	0.26
Volleyball Courts (outdoors)	0.28	Volleyball Courts (outdoors)	0.14
Skate/Bike Park (Neighborhood)	0.48	Skate/Bike Park (Neighborhood)	0.05
Climbing / Challenge Elements	0.96	Climbing / Challenge Elements	0.11
Park Restrooms	0.00	Park Restrooms	0.00
Interpretive Center	0.64	Interpretive Center	0.07
Environmental Center	0.38	Environmental Center	0.04
Outdoor Entertainment Venue	0.32	Outdoor Entertainment Venue	0.04
Recreation Centers (Neighborhood)	0.24	Recreation Centers (Neighborhood)	0.03
Playgrounds (Comm./Destination)	0.28	Playgrounds (Comm./Destination)	0.14
Playgrounds (Neighborhood)	0.00	Playgrounds (Neighborhood)	0.00
Skating Rinks (hockey)	0.19	Skating Rinks (hockey)	0.02
Skating Area (non-hockey)	0.24	Skating Area (non-hockey)	0.03
Swim. Pool / Aquatics Facilities	0.00	Swim. Pool / Aquatics Facilities	0.00
Sprayground / SplashPad	0.00	Sprayground / SplashPad	0.00
Golf Course 18-hole	0.38	Golf Course 18-hole	0.04
Driving Range	0.27	Driving Range	0.03
Disc Golf (18-holes)	0.64	Disc Golf (18-holes)	0.07
Dog Park Area	0.38	Dog Park Area	0.04
Maintenance Facilities (Hub)	0.00	Maintenance Facilities (Hub)	0.00
Maintenance Facilities (Satellite)	0.64	Maintenance Facilities (Satellite)	0.07

Table 8 – Current Deficiencies and Future Needs

Shelbyville Recreation Zone Improvement Plan Study

Acreage Needed for New Facilities – Community Level of Service

The new recreation components that will fill both the current deficiencies and future needs will require land area for their development. Keep in mind that the new components can be sited within existing parkland as well as in new parkland. The following table (**Table 9**) indicates the approximate acreage required for each of the deficient recreation components in one Impact Zone. In addition, the prioritized groupings of the recreation components have been summarized at the bottom of the table.

When applying the size needs for all of the recreation components the current deficiencies will require approximately 90.19 acres (4.20 acres of “A” Priorities not including the new land component). The future needs for all of the recreation components will require approximately 40.19 acres (not including the future need of 25.40 acres) with 2.06 acres of “A” Priorities. (Note: the purpose of this table is to illustrate the amount of land space required to accommodate the recreation facility. Thus, the reason for not including the land component in the totals).

Shelbyville – Recreation Impact Fee – Park System Analysis

ACREAGE NEEDS FOR RECREATION COMPONENTS

Recreation Components	Approximate Acres Required for Facility	Acres with a 15% Contingency Added	2019 Facility Needs	2019 Acres Needed	2028 Facility Needs	2028 Acres Needs of Future Populations	Priorities (Per Dept.)
A	B	C	D	E	F	G	H
Baseball Diamonds	3.23	3.71	1.92	7.13	0.21	0.79	
Softball Diamonds	2.25	2.59	1.59	4.12	1.06	2.74	A
Multi Purpose Fields	2.07	2.38	0.00	0.00	0.00	0.00	
Soccer Fields	0.17	0.20	0.00	0.00	0.00	0.00	
Tennis Courts	2.07	2.38	0.00	0.00	0.13	0.31	
Running / Walking Track (Comm)	0.20	0.23	0.24	0.06	0.03	0.01	
Basketball Goals (outdoors)	0.10	0.12	0.00	0.00	0.26	0.03	
Volleyball Courts (outdoors)	0.35	0.40	0.28	0.11	0.14	0.06	
Skate/Bike Park (Neighborhood)	0.10	0.12	0.48	0.06	0.05	0.01	
Climbing / Challenge Elements	0.10	0.12	0.96	0.11	0.11	0.01	
Park Shelters	0.10	0.12	0.67	0.08	0.85	0.10	A
Park Restrooms	1.50	1.73	0.00	0.00	0.00	0.00	
Interpretive Center	3.00	3.45	0.64	2.21	0.07	0.24	
Environmental Center	1.50	1.73	0.38	0.66	0.04	0.07	
Outdoor Entertainment Venue	0.50	0.58	0.32	0.18	0.04	0.02	
Recreation Centers (Neighborhood)	0.30	0.35	0.24	0.08	0.03	0.01	
Playgrounds (Comm./Destination)	0.15	0.17	0.28	0.05	0.14	0.02	
Playgrounds (Neighborhood)	2.00	2.30	0.00	0.00	0.00	0.00	
Skating Rinks (hockey)	0.26	0.30	0.19	0.06	0.02	0.01	
Skating Area (non-hockey)	15.00	17.25	0.24	4.14	0.03	0.46	
Swim. Pool / Aquatics Facilities	0.50	0.58	0.00	0.00	0.00	0.00	
Sprayground / SplashPad	0.15	0.17	0.00	0.00	0.00	0.00	
Golf Course 18-hole	135.00	155.25	0.38	59.57	0.04	6.57	
Driving Range	30.00	34.50	0.27	9.46	0.03	1.04	
Disc Golf (18-holes)	0.10	0.12	0.64	0.07	0.07	0.01	
Dog Park Area	3.00	3.45	0.38	1.32	0.04	0.15	
Maintenance Facilities (Hub)	2.00	2.30	0.00	0.00	0.00	0.00	
Maintenance Facilities (Satellite)	1.00	1.15	0.64	0.74	0.07	0.08	
Multi-use / Nature Pathways (miles)	4.01	4.61	0.00	0.00	0.45	2.06	A
Park / Open Space Acres	N/A	N/A	0.00	0.00	25.40	25.40	A
Total Park Acres Needed to Accommodate ALL of the Recreation Components				90.19		40.19	
Total Acres Needed to Accommodate "A" Priority Components (not including new park acres)				4.20		2.06	
Total Acres Needed to Accommodate the Remaining Components (not including new park acres)				85.99		9.89	

Table 9 – Acreage Needs for Recreation Components

Community Level of Service Needs and Cost Estimates

The cost estimates of the recreational amenities required to overcome both the current deficiencies and future needs were estimated by establishing facility costs for each of the recreation components. The information in **Table 10** illustrates the estimated costs required for both the current deficiencies and future needs. Note, the shaded lines are the recommended "A" priorities to be applied to the recreation impact fee calculations. Again, remember that current deficiencies cannot use Recreation Impact Fee resources, whereas *future needs* can use Impact Fees resources.

Facility Needs – Costs for One Impact Zone

Shelbyville – Recreation Impact Fee – Park System Analysis

FACILITY NEEDS – COSTS

04-Jan-19

One Zone – Town Wide Analysis (All Facilities)							
		19,184	= Estimated 2019 Pop.	21,301	= Projected 2028 Pop.		
Facility	Facilities Current	Facility Costs (assuming no land costs)	Needed Components to Remove Current Deficiency	Costs Needed to Remove Current Deficiency	Needed Components to Remove 2028 Deficiency	Costs Needed to Remove 2028 Deficiency	Priorities (Per Dept.)
Baseball Diamonds	0.00	\$ 80,000	1.92	\$ 153,475	0.21	\$ 16,936	
Softball Diamonds	8.00	\$ 60,000	1.59	\$ 95,533	1.06	\$ 63,508	A
Multi Purpose Fields	3.00	\$ 90,000	0.00	\$ -	0.00	\$ -	
Soccer Fields	10.00	\$ 90,000	0.00	\$ -	0.00	\$ -	
Tennis Courts	2.00	\$ 45,000	0.00	\$ -	0.13	\$ 5,856	
Running / Walking Track (Comm)	0.00	\$ 150,000	0.24	\$ 35,971	0.03	\$ 3,969	
Basketball Goals (outdoors)	4.00	\$ 20,000	0.00	\$ -	0.26	\$ 5,205	
Volleyball Courts (outdoors)	1.00	\$ 7,500	0.28	\$ 2,092	0.14	\$ 1,058	
Skate/Bike Park (Neighborhood)	0.00	\$ 150,000	0.48	\$ 71,942	0.05	\$ 7,939	
Climbing / Challenge Elements	0.00	\$ 40,000	0.96	\$ 38,369	0.11	\$ 4,234	
Park Shelters	7.00	\$ 75,000	0.67	\$ 50,533	0.85	\$ 63,508	A
Park Restrooms	20.00	\$ 100,000	0.00	\$ -	0.00	\$ -	
Interpretive Center	0.00	\$ 500,000	0.64	\$ 319,740	0.07	\$ 35,282	
Environmental Center	0.00	\$ 750,000	0.38	\$ 287,766	0.04	\$ 31,754	
Outdoor Entertainment Venue	0.00	\$ 750,000	0.32	\$ 239,805	0.04	\$ 26,462	
Recreation Centers (Neighborhood)	0.00	\$ 850,000	0.24	\$ 203,834	0.03	\$ 22,492	
Playgrounds (Comm./Destination)	1.00	\$ 150,000	0.28	\$ 41,844	0.14	\$ 21,169	
Playgrounds (Neighborhood)	7.00	\$ 75,000	0.00	\$ -	0.00	\$ -	
Skating Rinks (hockey)	0.00	\$ 2,500,000	0.19	\$ 479,611	0.02	\$ 52,923	
Skating Area (non-hockey)	0.00	\$ 300,000	0.24	\$ 71,942	0.03	\$ 7,939	
Swim. Pool / Aquatics Facilities	1.00	\$ 4,500,000	0.00	\$ -	0.00	\$ -	
Sprayground / SplashPad	1.00	\$ 200,000	0.00	\$ -	0.00	\$ -	
Golf Course 18-hole	0.00	\$ 5,000,000	0.38	\$ 1,918,442	0.04	\$ 211,694	
Driving Range	0.00	\$ 750,000	0.27	\$ 205,547	0.03	\$ 22,681	
Disc Golf (18-holes)	0.00	\$ 15,000	0.64	\$ 9,592	0.07	\$ 1,058	
Dog Park Area	0.00	\$ 400,000	0.38	\$ 153,475	0.04	\$ 16,936	
Maintenance Facilities (Hub)	1.00	\$ 750,000	0.00	\$ -	0.00	\$ -	
Maintenance Facilities (Satellite)	0.00	\$ 450,000	0.64	\$ 287,766	0.07	\$ 31,754	
Multi-use / Nature Pathways (miles)	9.02	\$ 211,200	0.00	\$ -	0.45	\$ 94,464	A
Park / Open Space Acres	297.43	\$ 30,000	0.00	\$ -	25.40	\$ 762,098	A
TOTALS				\$ 4,667,280		\$ 1,510,921	
		Cost of Facilities Needed to Remove Current Deficiency (2019):				\$ 4,667,280	
		Cost of Facilities Needed to Accommodate Future Development (2028):				\$ 1,510,921	
		Total Facility Costs:				\$ 6,178,200	

Applied Summary:	Current	2028 Pop.
	Costs Needed to Remove Current Deficiency	Costs Needed to Remove 2028 Deficiency
"A" Priorities Components	\$ 146,065	\$ 983,578
Remaining Priorities Components	\$ 4,521,215	\$ 527,343

Table 10 – Cost of Recreation Components to Overcome Current Deficiencies and Future Needs

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The component cost estimates were based on current construction estimates and those of actual projects. They are broad estimates at this point in time since there are many variables to consider. The current (2019) deficiencies (raising Current Level of Service to Community Level Service) for ALL recreation facilities total \$4,667,280 and if included in the RIF calculations would need to be completed within the next ten years (2028).

The component cost estimates for future (2028) needs, including ALL of the recreation components, total \$1,510,921. Costs for ALL current deficiencies AND future recreation facility needs total \$6,178,200. In the same manner the Prioritized Groupings were summarized at the bottom of the previous table. The current deficiencies (2019) for the "A" Priorities would be \$146,065. The "A" Priority components cost estimates for the future (2028) needs would be \$983,578.

Recreation Impact Fee Scenario

The Advisory Committee and the Consultant looked at various scenarios created by selection and combinations of components. **Table 11** lists each scenario and its current deficiency dollar amount and its future need dollar amount. The table then lists what the impact fee amount would be for each identified scenario. This calculation applies the total 10-year projected residential building permits (979 residential building permits) into the costs of the recreation components to determine a "gross" Recreation Impact Fee amount (without any applied deductions). The last two columns of **Table 11** show the ratio of the current deficiencies (what the City will be responsible for outside of RIF dollars) and the future needs (or available RIF dollars).

Recreation Impact Fee Scenario Analysis

4-Jan-19

Note: RIF Amounts do not reflect any Adjustments and are Gross Dollar Amounts (prior to any applied deductions)

Forecast 10-Year Residential Building Permits Total: 979

Recreation Components Included in Scenario	Priority Rank	Current Deficiencies	Future Needs	RIF Amount	Ratio (Town Share)	Ratio (RIF Share)
Priority "A" Components Only	A	\$ 146,065	\$ 983,578	\$ 1,005	12.9%	87.1%
Remaining Priorities Components	B	\$ 4,521,215	\$ 527,343	\$ 539	89.6%	10.4%
		\$ 4,667,280	\$ 1,510,921			
Baseball Diamonds		\$ 153,475	\$ 16,936	\$ 17	90.1%	9.9%
Softball Diamonds		\$ 95,533	\$ 63,508	\$ 65	60.1%	39.9%
Multi Purpose Fields		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Soccer Fields		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Tennis Courts		\$ -	\$ 5,856	\$ 6	0.0%	100.0%
Running / Walking Track (Comm)		\$ 35,971	\$ 3,969	\$ 4	90.1%	9.9%
Basketball Goals (outdoors)		\$ -	\$ 5,205	\$ 5	0.0%	100.0%
Volleyball Courts (outdoors)		\$ 2,092	\$ 1,058	\$ 1	66.4%	33.6%
Skate/Bike Park (Neighborhood)		\$ 71,942	\$ 7,939	\$ 8	90.1%	9.9%
Climbing / Challenge Elements		\$ 38,369	\$ 4,234	\$ 4	90.1%	9.9%
Park Shelters		\$ 50,533	\$ 63,508	\$ 65	44.3%	55.7%
Park Restrooms		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Interpretive Center		\$ 319,740	\$ 35,282	\$ 36	90.1%	9.9%
Environmental Center		\$ 287,766	\$ 31,754	\$ 32	90.1%	9.9%
Outdoor Entertainment Venue		\$ 239,805	\$ 26,462	\$ 27	90.1%	9.9%
Recreation Centers (Neighborhood)		\$ 203,834	\$ 22,492	\$ 23	90.1%	9.9%
Playgrounds (Comm./Destination)		\$ 41,844	\$ 21,169	\$ 22	66.4%	33.6%
Playgrounds (Neighborhood)		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Skating Rinks (hockey)		\$ 479,611	\$ 52,923	\$ 54	90.1%	9.9%
Skating Area (non-hockey)		\$ 71,942	\$ 7,939	\$ 8	90.1%	9.9%
Swim. Pool / Aquatics Facilities		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Sprayground / SplashPad		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Golf Course 18-hole		\$ 1,918,442	\$ 211,694	\$ 216	90.1%	9.9%
Driving Range		\$ 205,547	\$ 22,681	\$ 23	90.1%	9.9%
Disc Golf (18-holes)		\$ 9,592	\$ 1,058	\$ 1	90.1%	9.9%
Dog Park Area		\$ 153,475	\$ 16,936	\$ 17	90.1%	9.9%
Maintenance Facilities (Hub)		\$ -	\$ -	\$ -	#DIV/0!	#DIV/0!
Maintenance Facilities (Satellite)		\$ 287,766	\$ 31,754	\$ 32	90.1%	9.9%
Multi-use / Nature Pathways (miles)	A	\$ -	\$ 94,464	\$ 97	0.0%	100.0%
Park / Open Space Acres	A	\$ -	\$ 762,098	\$ 779	0.0%	100.0%
All Components		\$ 4,667,280	\$ 1,510,921	\$ 1,544	75.5%	24.5%
"A" Priority Items:		\$ 146,065	\$ 983,578	\$ 1,005	12.9%	87.1%

Table 11 –
Recreation
Impact Fee
Scenarios

Shelbyville Recreation Zone Improvement Plan Study

Table 12 provides a summary of the Applied Recreation Components ("A" Priorities) that will be applied in the Recreation Impact Fee calculations.

Recreation Impact Fee Scenario Summary of "A" Priorities Only

Note: RIF Amounts do not reflect any Adjustments and are Gross Dollar Amounts (prior to any applied deductions)

Recreation Components Included in Scenario	Priority Rank	Current Deficiencies	Future Needs	RIF Amount (Gross)	Ratio (City Share)	Ratio (RIF Share)
Softball Diamonds	A	\$ 95,533	\$ 63,508	\$ 65	60.1%	39.9%
Park Shelters	A	\$ 50,533	\$ 63,508	\$ 65	44.3%	55.7%
Multi-use / Nature Pathways (miles)	A	\$ -	\$ 94,464	\$ 97	0.0%	100.0%
Park / Open Space Acres	A	\$ -	\$ 762,098	\$ 779	0.0%	100.0%
Priority "A" Components		\$ 146,065	\$ 983,578	\$ 1,005	12.9%	87.1%

Table 12 – Recreation Impact Fee Scenario Summary of "A" Priorities

Recommended Recreation Impact Fee

Funding for Current Deficiencies Based on Community Level of Service

[IC 36-7-4-1318(c)(3)]

Again, Recreation Impact Fees cannot be used to cover the costs of identified current deficiencies. The noted current deficient recreation components have been listed in **Table 13** along with each project's funding sources and projected cost budget.

The current deficiencies of the selected "A" Priority components total \$146,065. The Consultant worked with the City Staff and Advisory Committee regarding the various funding sources that could be used to fund the current deficiencies. It was determined that the City acknowledges current deficiencies and their related costs and shall strategically focus on the funding of the deficiencies over the next 10 years. **Table 13** outlines the funding sources and their applied distribution.

For the infrastructure components of Softball Diamonds and Park Shelters it is assumed that the funding for the Softball Shelters will come from Another City Funding (EDIT or Racino). For the Park Shelters 20% of the project costs would be funded by Grants with the remaining coming from Another City Funding (EDIT and/or Racino). There were no current deficiencies for the Trails or Park Land.

The funding sources and their related percentage of distribution include: Grants (6.92%) and Another City Funding (EDIT and/or Racino) (93.08%). Additional funding sources are not anticipated at this time.

City of Shelbyville – Park and Recreation Department Forecast Funding for Current Recreation Component Deficiencies

4-Jan-19

Prepared by: City of Shelbyville and Lehman & Lehman, Inc.

Project Description		Quantities		Project Amount		Funding Source(s)							
	Needs		Costs			Grants	Park Capital Improvement Budget	City Econ. Development Fund (TIF)	Other City Funding (EDIT) or Racino	Bonds	Donations	Other	TOTALS
Softball Diamonds	1.59	\$	95,533			\$ -	\$ -	\$ -	\$ 95,533	\$ -	\$ -	\$ -	\$ 95,533
Park Shelters	0.67	\$	50,533			\$ 10,107	\$ -	\$ -	\$ 40,426	\$ -	\$ -	\$ -	\$ 50,533
Multi-use / Nature Pathways (miles)	0.00	\$	-			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Park / Open Space Acres	0.00	\$	-			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
						\$ 10,107	\$ -	\$ -	\$ 135,959	\$ -	\$ -	\$ -	\$ 146,065
						\$ 10,107	\$ -	\$ -	\$ 135,959	\$ -	\$ -	\$ -	\$ 146,065
						\$ 1,011	\$ -	\$ -	\$ 13,596	\$ -	\$ -	\$ -	\$ 14,607
						6.92%	0.00%	0.00%	93.08%	0.00%	0.00%	0.00%	100.00%
10 Year Total =						\$ 10,107	\$ -	\$ -	\$ 135,959	\$ -	\$ -	\$ -	\$ 146,065
10 Year Annual Average =						\$ 1,011	\$ -	\$ -	\$ 13,596	\$ -	\$ -	\$ -	\$ 14,607
Funding Sources Percentages =						6.92%	0.00%	0.00%	93.08%	0.00%	0.00%	0.00%	100.00%

Table 13 – Funding Sources for Current Deficiencies

Shelbyville Recreation Zone Improvement Plan Study

Analysis of Non-Local Revenue and Impact Deductions

Following IC 36-7-4-1321 the Recreation Impact Fee Formula is as follows:

Recreation Impact Fee =

Impact Costs – Non-Local Revenues – Impact Deductions / 10-Yr. Residential Building Permits

- **Impact Costs** = Cost estimate [made at time of study] needed to fund projected future infrastructure needs of the next 10-year period
- **Non-Local Revenue** = Reasonable estimate [made at time of study] of revenues that will be received from any source other than a governmental source that will be used in the Impact Zone
- **Impact Deduction** = Reasonable estimate [made at time of study] of revenues from taxes levied and charges & fees that will be paid during the 10-year period after assessment of the impact fee to defray the capital costs of providing infrastructure in the Impact Zone
- **10-Year Building Permits** = Forecast of residential building permits projected in the next ten-year period

Non-Local Revenue Deductions

From the analysis and work with the City there were no Non-Local Revenue Deductions that are anticipated as part of this study.

Impact Deductions

Recreation Impact Fees cannot be used to fund current deficiencies. From **Table 13**, two funding sources are noted for the current deficiencies. Those funding sources include Grants and Another City Funding. Both Grants and the identified Other City Funding sources have limited roots to property taxes and other residential sources. **Table 13** outlines the disbursements of the funds on an annual basis (years 2021 to 2028) as defined by the implementation year noted in **Table 14**.

City of Shelbyville – Park and Recreation Department									4-Jan-19
Forecast Annual Funding for Current Recreation Component Deficiencies									Prepared by: City of Shelbyville and Lehman & Lehman, Inc.
	A	B	C	D	E	F	G	H	
RIF YEARS	Grants	Park Capital Improvement Budget	City Econ. Development Fund (TIF)	Other City Funding (EDIT) or Racino	Bonds	Donations	Other	TOTALS	FUND TOTALS (B, E)
2019								\$ -	
2020			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2021	\$ 5,053	\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 22,048	\$ -
2022		\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 16,995	\$ -
2023		\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 16,995	\$ -
2024		\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 16,995	\$ -
2025	\$ 5,053	\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 22,048	\$ -
2026		\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 16,995	\$ -
2027		\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 16,995	\$ -
2028		\$ -	\$ -	\$ 16,995	\$ -	\$ -	\$ -	\$ 16,995	\$ -
2018-2027 TOTALS	\$ 10,107	\$ -	\$ -	\$ 135,959	\$ -	\$ -	\$ -	\$ 146,065	\$ -

Table 14 – Forecast Annual Funding for Current Deficiencies

Shelbyville Recreation Zone Improvement Plan Study

The impact of these funding sources will be based on the number of households within the City. The following **Table 15** establishes the cumulative households (column A) of the City over the next 10 years with the projected growth of households each year as noted in column B. The cumulative of the new household growth is noted in column C. The costs that affect residential property tax of the current deficiency for the next 10 years are noted in column D. The table indicates the calculated amounts of the funding of current deficiency per household (columns E, G, and H). The totals of those three columns are multiplied by the cumulative New Households (column C) to determine the impact deductions for each year of the 10-year RIF period as noted in column I. The total Impact Deduction amount is determined to be \$0.00.

City of Shelbyville – Park and Recreation Department

Impact Deduction Calculations

Prepared by: City of Shelbyville and Lehman & Lehman, Inc.

RIF Years	A Cumulative Households	B New Households (Annual)	C New Households (Cumulative)	D Costs to Remove Current Deficiency	E Cost / Household for Park Cap. Imp. Budget	F Cost / Household for Town TIF	G Cost / Household Town Cumulative Capital Funds	H Impact Deductions (Cum. From Bond Issue New Households)	I Totals of Impact Deductions for the New Households
2018	8,364								
2019	8,414	50	50	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2020	8,477	63	113	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2021	8,562	85	198	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2022	8,656	94	292	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2023	8,756	100	392	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2024	8,861	105	497	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2025	8,972	111	608	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2026	9,088	117	724	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2027	9,211	123	847	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2028	9,343	132	979	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTALS		979		\$ -					\$ -
NOTES:	Cumulative households over 10 year period	Projected new households over 10 year period	Cumulative Totals of New Household Growth over 10-Yr. Period	Budgeted portion from the implementation schedule	Cost Per household to remove existing defic. Using Park Cap. Imp. Budget	There is not Residential Impact in the generation of Town TIF	Cost Per household to remove existing defic. Using Town Cum. Capital Funds	Cost Per household to remove existing defic. Bond Issue Funding	Costs applied to new households for current deficiencies [E + G + H times C]
Total Impact Deduction for Columns E, G, H times cumulative number of New Households: \$ -									

Table 15 – Impact Deduction Calculations

Recreation Impact Fee

As shown in **Table 16** the total estimated cost of improvements ("A" Priorities) needed to accommodate projected future growth is \$983,578 (Adjusted Impact Costs which include the deductions of the Non-Local Revenues and Impact Deductions). Therefore, the Recreation Impact Fee is calculated as indicated in **Table 16**. Using this formula, the result is a recommended Impact Fee of **\$1,005**.

This recommended Recreation Impact Fee assumes that there will be a growth in housing permits at an average of 98 units per year over the next ten years (2019-2028). There will be the need to perform an update to this recreation impact fee study and ordinance by or before 2022.

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Shelbyville Recreation Zone Improvement Plan Study

City of Shelbyville – Recreation Impact Fee – Park System Analysis

IMPACT FEE CALCULATIONS

30-Jan-2019

Recommended Recreation Impact Fee – City of Shelbyville

Selected "A" Priorities: Softball Fields, Park Shelters, Trails, & Park / Open Space Acres

Costs Needed to Remove Current Deficiency =	\$	146,065
Projected Costs / Year (2019 to 2028) =	\$	14,607

As per IC 36-7-4-1321: The Impact Fee Formula is as follows:

Impact Costs – Non-Local Revenues – Impact Deductions / 10-Yr Building Permits = Impact Fee

	2028Population
Projected 2028 Populations =	21,301
Number of Expected Residential Building Permits in the next 10 years =	979
Impact Costs Needed to Meet Future (2028) Needs =	\$ 983,578
Less Anticipated Non-Local Revenues Available towards Future (2028) Needs =	\$ -
Less Anticipated Impact Deductions against Future (2028) Needs =	\$ -
Adjusted Future Needs Costs =	\$ 983,578
Projected Recreation Impact Fee = \$ 1,005	

Housing Equivalents (Option)

Type of Unit	Full Equivalent	Fee
Single - Family Dwelling Unit	100%	\$ 1,005
Two - Family Dwelling Unit (per dwelling unit)	85%	\$ 854
Multi - Family Dwelling Unit (per dwelling unit)		
One Bedroom	65%	\$ 653
Two Bedrooms	85%	\$ 854
Three Bedrooms or Larger	100%	\$ 1,005
Mobile Home	85%	\$ 854

Table 16 – Recommended Recreation Impact Fee Calculation

RIF Housing Equivalent – Some communities have included as a part of their RIF Ordinance a Housing Equivalent to the established recreation impact fee. Advisory Committee did not offer a recommendation regarding applying a Housing Equivalent adjustment. The Advisory Committee noted this RIF adjustment as part of the study but deferred a decision in applying these adjustments to the Plan Commission and/or the City Council. A sample of how the Optional Housing Equivalent could be applied can be found at the bottom of **Table 16**.

Annual Revenue Forecasts

The collection of Recreation Impact Fee revenues cannot begin until six (6) months after the approval of the ordinance by the City. Assuming that the City Council will approve the RIF ordinance in March 2019 the six-month period will end in approximately September 2019. Based on this there will be no RIF collections until September 2019. **Table 17** and **Figure 7** illustrate the projected revenue for Recreation Impact Fees. The Advisory Committee did not offer a recommendation regarding any annual adjustment (i.e. an *annual increase percentage* or *Gross Domestic Product* annual figure) factored into the impact fee amount. The Advisory Committee noted both of these RIF adjustments as part of the study but deferred a decision in applying these adjustments to the Plan Commission and/or the City Council.

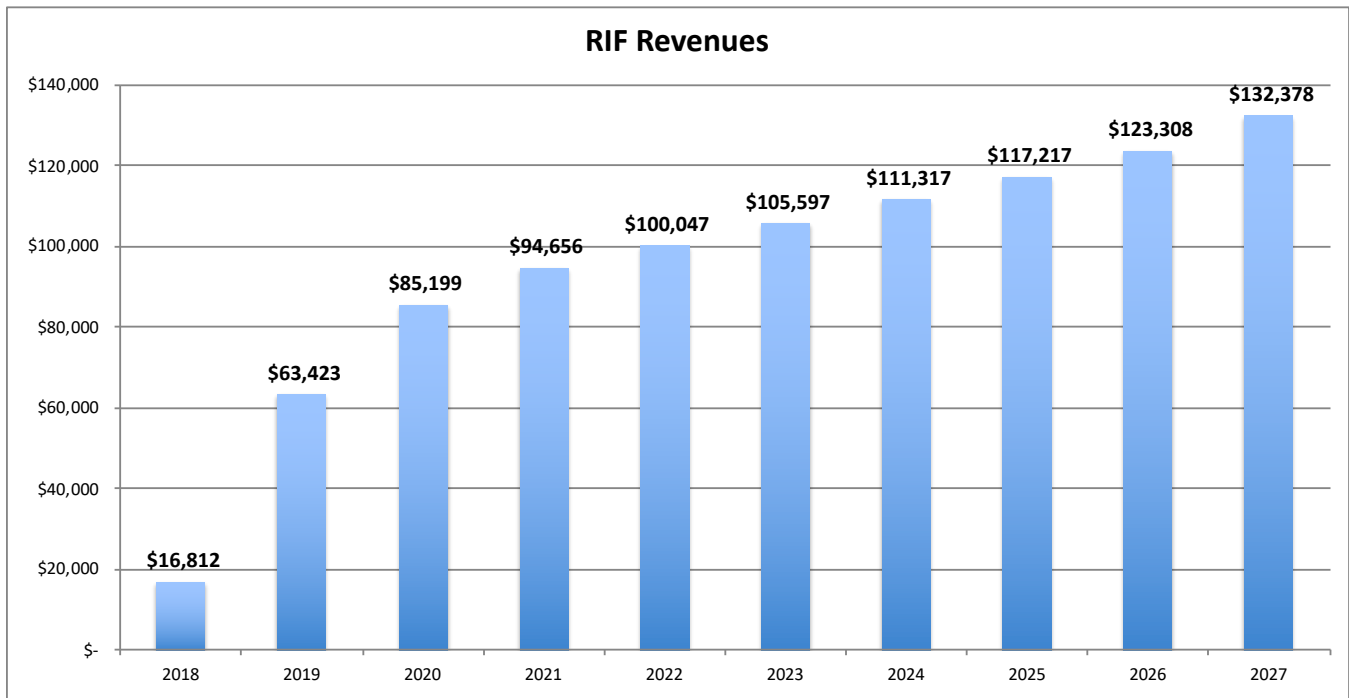


Figure 7 – Recreation Impact Fee Revenues Graph

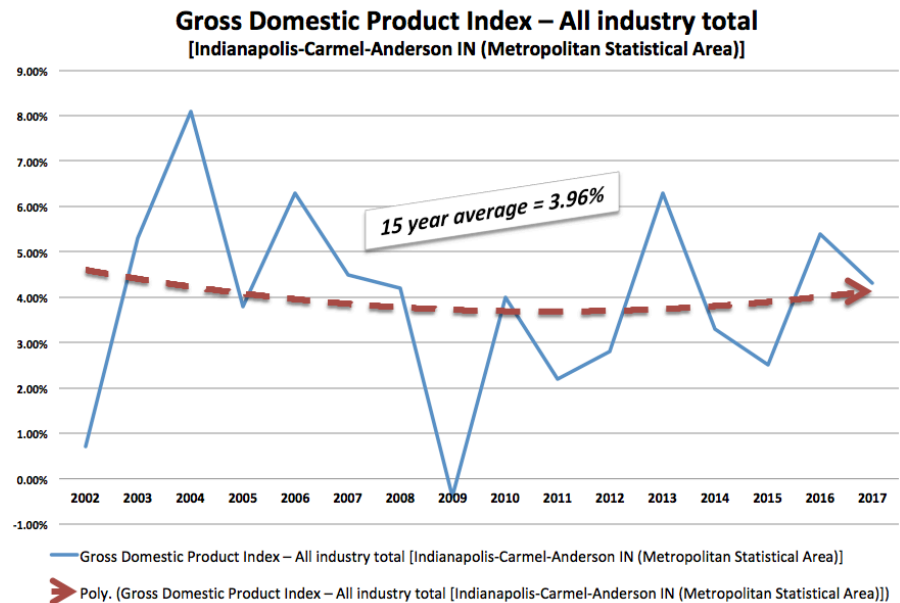
Shelbyville Recreation Zone Improvement Plan Study

Annual Inflationary Adjustments

In order to keep pace with the increase of construction costs several other communities have adopted their Recreation Impact Fee Ordinance with a stepped increase over the ten-year period. Other communities have adopted an annual inflationary adjustment factor. One of the factors used in the Indianapolis-Carmel-Anderson Metropolitan Statistical area is the **Gross Domestic Product (GDP)**.

The Bureau of Economic Analysis has calculated the Annual percentage change from 2002 to 2017. The following **Figure 7** illustrate this annual change. There has been a trend with an annual average trend of 3.96% over the last 15 years.

Figure 7 – GDP Percentage Change from 2002 to 2017



The Advisory Committee did not offer a recommendation regarding any annual adjustment (i.e. an *annual increase percentage* or *Gross Domestic Product* annual figure) factored into the impact fee amount. The Advisory Committee noted this RIF adjustments as part of the study but deferred a decision in applying such adjustments to the Plan Commission and/or the City Council. **Table 17** illustrate the projected revenue for Recreation Impact Fees with and without the inflation factor applied. A flat inflationary percentage could be used for this adjustment or annual adjustments could be made using a **Gross Domestic Product (GDP)** factor.

Projected Future Annual Collections of Recreation Impact Fees

	2019 **	2020	2021	2022	2023	2024	2025	2026	2027	2028
*Projected New Residential Building Permits:	50	63	85	94	100	105	111	117	123	132
Applied RIF: \$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005
Projected Recreation Impact Fee Collections:	\$ 16,812	\$ 63,423	\$ 85,199	\$ 94,656	\$ 100,047	\$ 105,597	\$ 111,317	\$ 117,217	\$ 123,308	\$ 132,378
Cumulative RIF Gained:	\$ 16,812	\$ 80,235	\$ 165,434	\$ 260,090	\$ 360,137	\$ 465,734	\$ 577,051	\$ 694,268	\$ 817,576	\$ 949,954
Applied RIF: \$ 1,005	\$ 1,005	\$ 1,035	\$ 1,066	\$ 1,098	\$ 1,131	\$ 1,165	\$ 1,200	\$ 1,236	\$ 1,273	\$ 1,311
Projected RIF with 3.0% Gross Domestic Product Factor:	\$ 16,812	\$ 65,326	\$ 90,387	\$ 103,433	\$ 112,604	\$ 122,416	\$ 132,918	\$ 144,162	\$ 156,203	\$ 172,723
Cumulative RIF Gained with Inflation:	\$ 16,812	\$ 82,138	\$ 172,525	\$ 275,958	\$ 388,562	\$ 510,978	\$ 643,897	\$ 788,059	\$ 944,261	\$ 1,116,985

**** NOTE:** The six month waiting period from ordinance approval before collecting RIF has been reflected in the above table.
It is assumed that there will be four months recreation impact fees will be collected in 2019 (assuming Ordinance approval in March 2019).

Table 17 – Recreation Impact Fee Revenue 10-Year Projection

Donations or In Lieu Of Impact Fee Components

As is being experienced in other communities that have Recreation Impact Fee ordinances, residential developers sometimes prefer to have the option to develop noted recreation components themselves and receive credit against impact fee charges. It was felt that both the multi-use trails and the land/open space are components where credit against Recreation Impact Fees could be considered. The City will need to develop the policy for such credit considerations.

Shelbyville Recreation Zone Improvement Plan Study



National Averages of Recreation Impact Fees

The firm of *Clancy Mullen, Duncan Associates* annually tracks Impact Fees throughout the country. Their 2015 *National Impact Fee Survey* results serve only as a reference to this study. The averages of the 2015 survey found the following:

- Average Recreation Impact Fees of 195 municipalities -----\$2,812

Recreation Impact Fee Statistics – State of Indiana

Current Recreation Impact Fees of the noted municipalities (with ordinance dates noted).

- City of Noblesville (ordinance updated in 2014) -----\$1,718
- City of Valparaiso (ordinance updated in 2015) -----\$1,288
- City of Carmel (current ordinance, 2013) -----\$1,526
- City of Fishers (ordinance, 2012) -----\$1,070
- City of Franklin (ordinance, 2005) -----\$870
- City of Westfield (updated ordinance, 2013) -----\$1,309
- City of Plainfield (updated ordinance, 2012) -----\$730
- City of Cicero (updated ordinance, 2012) -----\$843
- City of St. John (ordinance, 2013) -----\$1,736
- City of Chesterton (ordinance, 2014) -----\$889
- City of Brownsburg (updated ordinance, 2013) -----\$939
- City of Greenwood (ordinance 2015) -----\$1,206
- City of Greenfield (ordinance, 2019) -----\$1,313
- City of Danville (ordinance established in 2016) -----\$789
- City of Avon (proposed ordinance, 2017) -----\$1,095
- City of Bargersville (ordinance, 2017) -----\$748
- **Average Recreation Impact Fees of the above noted communities -----\$1,126**
- **Proposed Recreation Impact Fee for City of Shelbyville (2019) -----\$1,005**

Shelbyville Recreation Zone Improvement Plan Study

Implementation Schedule – For Raising Current Deficiencies to Community Level of Service [IC 36-7-4-1318(c)(1)(2)]

The following Table (*Table 18*) represents a tentative implementation schedule to meet the baseline of service for the identified current deficiencies. Only the recreation components related and factored into the Recreation Impact Fee are summarized on an annual basis.

Current Deficiencies Implementation – Non-Recreation Impact Fees													Note: The various components not a part of the Impact Fee Calculations have not been included in the list below.
Recreation Component	Component Unit Cost	Current Deficiency	Component Costs	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Softball Diamonds	\$ 60,000	1.59	\$ 95,533			\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942
Park Shelters	\$ 75,000	0.67	\$ 50,533			\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317
Multi-use / Nature Pathways (miles)	\$ 211,200	0.00	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Park / Open Space Acres	\$ 30,000	0.00	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Current Deficiency Total: \$ 146,065				\$ -	\$ -	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258
IMPLEMENTATION PER YEAR:													
			Softball Diamonds			0.20	0.20	0.20	0.20	0.20	0.20	0.20	0.20
			Park Shelters			0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08
			Multi-use / Nature Pathways (miles)			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			Park / Open Space Acres			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
The following park sites / facilities are suggested to facilitate the deficient recreational components:													
LOCATIONS OF COMPONENTS:													
			Softball Diamonds			TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
			Park Shelters			TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
			Multi-use / Nature Pathways (miles)			TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
			Park / Open Space Acres			TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD

Table 18 – Implementation Schedule for Current Deficiencies

The Advisory Committee recommends that the 8-year implementation schedule begins in 2021 with the Softball Diamonds and Park Shelters and running until 2028. The locations of these components will be determined by the Park Board and the City Administration based on land availability, need, and priorities of the Park Master Plan.

Implementation Schedule – Future Anticipated Needs Based on Community Level of Service [IC 36-7-4-1318(b)(4)(5)]

The following Table (*Table 19*) represents a tentative implementation schedule to meet the baseline of service for the identified future needs. These needs are fundable via Recreation Impact Fees.

Future Needs Implementation – Recreation Impact Fees													Note: The various components not a part of the Impact Fee Calculations have not been included in the list below.
Recreation Component	Component Unit Cost	Future Need	Component Costs	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Softball Diamonds	\$ 60,000	1.06	\$ 63,508			\$ 63,508							
Park Shelters	\$ 75,000	0.85	\$ 63,508			\$ 63,508							
Multi-use / Nature Pathways (miles)	\$ 211,200	0.45	\$ 94,464				\$ 94,464						
Park / Open Space Acres	\$ 30,000	25.40	\$ 762,098						\$ 200,000		\$ 200,000		\$ 311,662
Future Needs Total: \$ 983,578				\$ -	\$ -	\$ 127,016	\$ 94,464	\$ -	\$ 200,000	\$ -	\$ 200,000	\$ -	\$ 311,662
IMPLEMENTATION PER YEAR:													
			Softball Diamonds			1.06							
			Park Shelters			0.85							
			Multi-use / Nature Pathways (miles)				0.45						
			Park / Open Space Acres					6.67		6.67			10.39
The following park sites / facilities are suggested to facilitate the future needed recreational components:													
LOCATIONS OF COMPONENTS:													
			Softball Diamonds				TBD						
			Park Shelters				TBD						
			Multi-use / Nature Pathways (miles)					TBD		TBD			
			Park / Open Space Acres					TBD		TBD			TBD

Table 19 – Implementation Schedule for Future Needs

The Advisory Committee recommends that the implementation for future needs be done starting in 2021 and continuing implementation with available RIF funding through 2028. The implementation of the various recreation components is suggested over the 10-year period. The funding resource for these future need items will come from the collected Recreation Impact Fees. The implementation of the various infrastructure components will be based on the available funds from the collected recreation impact fees. The location of the various components will be determined by the Park Board and the City Administration based on land availability, growth in specific areas, need, and priorities of the Park Master Plan.

Shelbyville Recreation Zone Improvement Plan Study

Summary of Impact Fee Study

The following previously illustrated tables summarize the inventory, need analysis, and cost projections for this study.

Shelbyville – Recreation Impact Fee – Park System Analysis

LAND INVENTORY – CURRENT LEVEL OF SERVICE

4-Jan-19

Town Wide Analysis							
Estimated 2018 and Projected Populations = 19,184 21,301							
A	B	C	D	E	F	G	H
Park Type	Typical Park Size (Acres)	Total Existing Acreage	Acres Standards / 1,000	Current Acreage Stds./1,000	Current Acreage Needs	2018 Surplus or Deficiency	2027 Needed if current deficiency IS met
Block Park	1 to 5	0.30	0.50	0.02	9.59	(9.29)	(1.06)
Neighborhood Park	4 to 15	76.00	1.50	3.96	28.78	47.22	(3.18)
Community Park	10 to 70	199.99	5.00	10.42	95.92	104.07	(10.58)
Special / Linear Parks	2.00	21.14	1.00	1.10	19.18	1.95	(2.12)
Total Surplus or Deficiency		297.43	8.00	15.50	153.48	143.95	(16.94)

Data updated from the Park and Recreation Master Plan.

Using the Current Land Inventory as the Standard for Park Land and Open Space the Acres Standard per 1,000 persons would be (includes current population) = 15.50

LAND INVENTORY – COMMUNITY LEVEL OF SERVICE

Shelbyville Acres Standard						2027 Pop.
Populations = 19,184						21,301
I	J	K	L	M	N	O
Park Type	Total Existing Acreage	Community Level of Service - Acres Standards / 1,000	2018 Acreage Needs	2018 Surplus or Deficiency	2027 Acreage Needs	2027 Needed if current deficiency IS met
Total Surplus or Deficiency	297.43	12.00	230.21	67.21	255.62	(25.40)

Suggestion standard acres / 1,000 persons -----^

Shelbyville – Recreation Impact Fee – Park System Analysis

FACILITY INVENTORY AND NEEDS – One Impact Zone Area

4-Jan-19

One Impact Zone Area													
19,184 = Estimated 2019 Pop. 21,301 = Projected 2028 Pop.													
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Facility	Shelbyville Community Level of Service	Community Level of Service / 1,000 Pop.	Current Level of Service / 1,000 Pop.	Current Facilities in the Park Dept.*	Current Facilities within the Comm.	Total Inventory of Facilities	Community Level of Service (2019 pop.)	2019 Surplus or Deficiency	Current Deficiencies (Community Level of Service)	2019 Surplus or Deficiency (CLS) Factor All Facilities	Community Level of Service 2028 Needs	2028 Needed if current deficiency IS met	2028 Needs (Community Level of Service)
Baseball Diamonds	1/10,000	0.10	0.00	0.00	2.00	2.00	1.92	(1.92)	1.92	0.08	2.13	(0.21)	0.21
Softball Diamonds	1/2,000	0.50	0.42	8.00	2.00	10.00	9.59	(1.59)	1.59	0.41	10.65	(1.06)	1.06
Multi Purpose Fields	1/8,000	0.13	0.16	3.00	1.00	4.00	2.40	0.60	0.00	1.60	2.66	0.34	0.00
Soccer Fields	1/4,000	0.25	0.52	10.00	1.00	11.00	4.80	5.20	0.00	6.20	5.33	4.67	0.00
Tennis Courts	1/10,000	0.10	0.10	2.00	0.00	2.00	1.92	0.08	0.00	0.08	2.13	(0.13)	0.13
Running / Walking Track (Comm)	1/80,000	0.01	0.00	0.00	8.00	8.00	0.24	(0.24)	0.24	7.76	0.27	(0.03)	0.03
Basketball Goals (outdoors)	1/5,000	0.20	0.21	4.00	1.00	5.00	3.84	0.16	0.00	1.16	4.26	(0.26)	0.26
Volleyball Courts (outdoors)	1/15,000	0.07	0.05	1.00	0.00	1.00	1.28	(0.28)	0.28	(0.28)	1.42	(0.14)	0.14
Skate/Bike Park (Neighborhood)	1/40,000	0.03	0.00	0.00	0.00	0.00	0.48	(0.48)	0.48	(0.48)	0.53	(0.05)	0.05
Climbing / Challenge Elements	1/20,000	0.05	0.00	0.00	0.00	0.00	0.96	(0.96)	0.96	(0.96)	1.07	(0.11)	0.11
Park Shelters	1/2,500	0.40	0.36	7.00	0.00	7.00	7.67	(0.67)	0.67	(0.67)	8.52	(0.85)	0.85
Park Restrooms	1/4,000	0.25	1.04	20.00	0.00	20.00	4.80	15.20	0.00	15.20	5.33	14.67	0.00
Interpretive Center	1/30,000	0.03	0.00	0.00	0.00	0.00	0.64	(0.64)	0.64	(0.64)	0.71	(0.07)	0.07
Environmental Center	1/50,000	0.02	0.00	0.00	1.00	1.00	0.38	(0.38)	0.38	0.62	0.43	(0.04)	0.04
Outdoor Entertainment Venue	1/60,000	0.02	0.00	0.00	0.00	0.00	0.32	(0.32)	0.32	(0.32)	0.36	(0.04)	0.04
Recreation Centers (Neighborhood)	1/80,000	0.01	0.00	0.00	0.00	0.00	0.24	(0.24)	0.24	(0.24)	0.27	(0.03)	0.03
Playgrounds (Comm./Destination)	1/15,000	0.07	0.05	1.00	0.00	1.00	1.28	(0.28)	0.28	(0.28)	1.42	(0.14)	0.14
Playgrounds (Neighborhood)	1/30,000	0.03	0.36	7.00	3.00	10.00	0.64	6.36	0.00	9.36	0.71	6.29	0.00
Skating Rinks (hockey)	1/100,000	0.01	0.00	0.00	0.00	0.00	0.19	(0.19)	0.19	(0.19)	0.21	(0.02)	0.02
Skating Area (non-hockey)	1/80,000	0.01	0.00	0.00	0.00	0.00	0.24	(0.24)	0.24	(0.24)	0.27	(0.03)	0.03
Swim. Pool / Aquatics Facilities	1/30,000	0.03	0.05	1.00	2.00	3.00	0.64	0.36	0.00	2.36	0.71	0.29	0.00
Sprayground / SplashPad	1/25,000	0.04	0.05	1.00	0.00	1.00	0.77	0.23	0.00	0.23	0.85	0.15	0.00
Golf Course 18-hole	1/50,000	0.02	0.00	0.00	0.00	0.00	0.38	(0.38)	0.38	(0.38)	0.43	(0.04)	0.04
Driving Range	1/70,000	0.01	0.00	0.00	0.00	0.00	0.27	(0.27)	0.27	(0.27)	0.30	(0.03)	0.03
Disc Golf (18-holes)	1/30,000	0.03	0.00	0.00	0.00	0.00	0.64	(0.64)	0.64	(0.64)	0.71	(0.07)	0.07
Dog Park Area	1/50,000	0.02	0.00	0.00	0.00	0.00	0.38	(0.38)	0.38	(0.38)	0.43	(0.04)	0.04
Maintenance Facilities (Hub)	1/30,000	0.03	0.05	1.00	0.00	1.00	0.64	0.36	0.00	0.36	0.71	0.29	0.00
Maintenance Facilities (Satellite)	1/30,000	0.03	0.00	0.00	0.00	0.00	0.64	(0.64)	0.64	(0.64)	0.71	(0.07)	0.07
Multi-use / Nature Pathways (miles)	1 mile / 2,250	0.44	0.47	9.02	0.00	9.02	8.53	0.49	0.00	0.49	9.47	(0.45)	0.45
Park / Open Space Acres	12.0 ac / 1,000	12.00	15.50	297.43	0.00	297.43	230.21	67.21	0.00	67.21	255.62	(25.40)	25.40

* Current Facilities Data updated from information provided by the Park Department.

DEVELOPMENT PRIORITY:

Top Priority	A
High Priority	B
Low Priority	C

Shelbyville Recreation Zone Improvement Plan Study



Shelbyville – Recreation Impact Fee – Park System Analysis

FACILITY NEEDS – COSTS

04-Jan-19

One Zone – Town Wide Analysis (All Facilities)			19,184	= Estimated 2019 Pop.	21,301	= Projected 2028 Pop.	
Facility	Facilities Current	Facility Costs (assuming no land costs)	Needed Components to Remove Current Deficiency	Costs Needed to Remove Current Deficiency	Needed Components to Remove 2028 Deficiency	Costs Needed to Remove 2028 Deficiency	Priorities (Per Dept.)
Baseball Diamonds	0.00	\$ 80,000	1.92	\$ 153,475	0.21	\$ 16,936	
Softball Diamonds	8.00	\$ 60,000	1.59	\$ 95,533	1.06	\$ 63,508	A
Multi Purpose Fields	3.00	\$ 90,000	0.00	\$ -	0.00	\$ -	
Soccer Fields	10.00	\$ 90,000	0.00	\$ -	0.00	\$ -	
Tennis Courts	2.00	\$ 45,000	0.00	\$ -	0.13	\$ 5,856	
Running / Walking Track (Comm)	0.00	\$ 150,000	0.24	\$ 35,971	0.03	\$ 3,969	
Basketball Goals (outdoors)	4.00	\$ 20,000	0.00	\$ -	0.26	\$ 5,205	
Volleyball Courts (outdoors)	1.00	\$ 7,500	0.28	\$ 2,092	0.14	\$ 1,058	
Skate/Bike Park (Neighborhood)	0.00	\$ 150,000	0.48	\$ 71,942	0.05	\$ 7,939	
Climbing / Challenge Elements	0.00	\$ 40,000	0.96	\$ 38,369	0.11	\$ 4,234	
Park Shelters	7.00	\$ 75,000	0.67	\$ 50,533	0.85	\$ 63,508	A
Park Restrooms	20.00	\$ 100,000	0.00	\$ -	0.00	\$ -	
Interpretive Center	0.00	\$ 500,000	0.64	\$ 319,740	0.07	\$ 35,282	
Environmental Center	0.00	\$ 750,000	0.38	\$ 287,766	0.04	\$ 31,754	
Outdoor Entertainment Venue	0.00	\$ 750,000	0.32	\$ 239,805	0.04	\$ 26,462	
Recreation Centers (Neighborhood)	0.00	\$ 850,000	0.24	\$ 203,834	0.03	\$ 22,492	
Playgrounds (Comm./Destination)	1.00	\$ 150,000	0.28	\$ 41,844	0.14	\$ 21,169	
Playgrounds (Neighborhood)	7.00	\$ 75,000	0.00	\$ -	0.00	\$ -	
Skating Rinks (hockey)	0.00	\$ 2,500,000	0.19	\$ 479,611	0.02	\$ 52,923	
Skating Area (non-hockey)	0.00	\$ 300,000	0.24	\$ 71,942	0.03	\$ 7,939	
Swim. Pool / Aquatics Facilities	1.00	\$ 4,500,000	0.00	\$ -	0.00	\$ -	
Sprayground / SplashPad	1.00	\$ 200,000	0.00	\$ -	0.00	\$ -	
Golf Course 18-hole	0.00	\$ 5,000,000	0.38	\$ 1,918,442	0.04	\$ 211,694	
Driving Range	0.00	\$ 750,000	0.27	\$ 205,547	0.03	\$ 22,681	
Disc Golf (18-holes)	0.00	\$ 15,000	0.64	\$ 9,592	0.07	\$ 1,058	
Dog Park Area	0.00	\$ 400,000	0.38	\$ 153,475	0.04	\$ 16,936	
Maintenance Facilities (Hub)	1.00	\$ 750,000	0.00	\$ -	0.00	\$ -	
Maintenance Facilities (Satellite)	0.00	\$ 450,000	0.64	\$ 287,766	0.07	\$ 31,754	
Multi-use / Nature Pathways (miles)	9.02	\$ 211,200	0.00	\$ -	0.45	\$ 94,464	A
Park / Open Space Acres	297.43	\$ 30,000	0.00	\$ -	25.40	\$ 762,098	A
TOTALS				\$ 4,667,280		\$ 1,510,921	
	Cost of Facilities Needed to Remove Current Deficiency (2019):					\$ 4,667,280	
	Cost of Facilities Needed to Accommodate Future Development (2028):					\$ 1,510,921	
	Total Facility Costs:					\$ 6,178,200	

Recreation Impact Fee Scenario Summary of “A” Priorities Only

Note: RIF Amounts do not reflect any Adjustments and are Gross Dollar Amounts (prior to any applied deductions)

Recreation Components Included in Scenario	Priority Rank	Current Deficiencies	Future Needs	RIF Amount (Gross)	Ratio (City Share)	Ratio (RIF Share)
Softball Diamonds	A	\$ 95,533	\$ 63,508	\$ 65	60.1%	39.9%
Park Shelters	A	\$ 50,533	\$ 63,508	\$ 65	44.3%	55.7%
Multi-use / Nature Pathways (miles)	A	\$ -	\$ 94,464	\$ 97	0.0%	100.0%
Park / Open Space Acres	A	\$ -	\$ 762,098	\$ 779	0.0%	100.0%
Priority “A” Components		\$ 146,065	\$ 983,578	\$ 1,005	12.9%	87.1%

Shelbyville Recreation Zone Improvement Plan Study

City of Shelbyville – Recreation Impact Fee – Park System Analysis

IMPACT FEE CALCULATIONS

30-Jan-2019

Recommended Recreation Impact Fee – City of Shelbyville

Selected "A" Priorities: Softball Fields, Park Shelters, Trails, & Park / Open Space Acres

Costs Needed to Remove Current Deficiency = \$	146,065
Projected Costs / Year (2019 to 2028) = \$	14,607

As per IC 36-7-4-1321: The Impact Fee Formula is as follows:

Impact Costs – Non-Local Revenues – Impact Deductions / 10-Yr Building Permits = Impact Fee

	2028 Population
Projected 2028 Populations =	21,301
Number of Expected Residential Building Permits in the next 10 years =	979
Impact Costs Needed to Meet Future (2028) Needs =	\$ 983,578
Less Anticipated Non-Local Revenues Available towards Future (2028) Needs =	\$ -
Less Anticipated Impact Deductions against Future (2028) Needs =	\$ -
Adjusted Future Needs Costs =	\$ 983,578
Projected Recreation Impact Fee = \$ 1,005	

Projected Future Annual Collections of Recreation Impact Fees

	2019 **	2020	2021	2022	2023	2024	2025	2026	2027	2028
*Projected New Residential Building Permits:	50	63	85	94	100	105	111	117	123	132
Applied RIF: \$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005	\$ 1,005
Projected Recreation Impact Fee Collections:	\$ 16,812	\$ 63,423	\$ 85,199	\$ 94,656	\$ 100,047	\$ 105,597	\$ 111,317	\$ 117,217	\$ 123,308	\$ 132,378
Cumulative RIF Gained:	\$ 16,812	\$ 80,235	\$ 165,434	\$ 260,090	\$ 360,137	\$ 465,734	\$ 577,051	\$ 694,268	\$ 817,576	\$ 949,954
Applied RIF: \$ 1,005	\$ 1,005	\$ 1,035	\$ 1,066	\$ 1,098	\$ 1,131	\$ 1,165	\$ 1,200	\$ 1,236	\$ 1,273	\$ 1,311
Projected RIF with 3.0% Gross Domestic Product Factor:	\$ 16,812	\$ 65,326	\$ 90,387	\$ 103,433	\$ 112,604	\$ 122,416	\$ 132,918	\$ 144,162	\$ 156,203	\$ 172,723
Cumulative RIF Gained with Inflation:	\$ 16,812	\$ 82,138	\$ 172,525	\$ 275,958	\$ 388,562	\$ 510,978	\$ 643,897	\$ 788,059	\$ 944,261	\$ 1,116,985

** NOTE: The six month waiting period from ordinance approval before collecting RIF has been reflected in the above table.
It is assumed that there will be four months recreation impact fees will be collected in 2019 (assuming Ordinance approval in March 2019).

Current Deficiencies Implementation – Non-Recreation Impact Fees

Note: The various components not a part of the Impact Fee Calculations have not been included in the list below.

Recreation Component	Component Unit Cost	Current Deficiency	Component Costs	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Softball Diamonds	\$ 60,000	1.59	\$ 95,533			\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942	\$ 11,942
Park Shelters	\$ 75,000	0.67	\$ 50,533			\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317	\$ 6,317
Multi-use / Nature Pathways (miles)	\$ 211,200	0.00	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Park / Open Space Acres	\$ 30,000	0.00	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Current Deficiency Total: \$ 146,065				\$ -	\$ -	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258	\$ 18,258
IMPLEMENTATION PER YEAR:						0.20	0.20	0.20	0.20	0.20	0.20	0.20	0.20
Softball Diamonds						0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08
Park Shelters						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Multi-use / Nature Pathways (miles)						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Park / Open Space Acres						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Future Needs Implementation – Recreation Impact Fees

Note: The various components not a part of the Impact Fee Calculations have not been included in the list below.

Recreation Component	Component Unit Cost	Future Need	Component Costs	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Softball Diamonds	\$ 60,000	1.06	\$ 63,508			\$ 63,508							
Park Shelters	\$ 75,000	0.85	\$ 63,508			\$ 63,508							
Multi-use / Nature Pathways (miles)	\$ 211,200	0.45	\$ 94,464				\$ 94,464						
Park / Open Space Acres	\$ 30,000	25.40	\$ 762,098						\$ 200,000		\$ 200,000		\$ 311,662
Future Needs Total: \$ 983,578				\$ -	\$ -	\$ 127,016	\$ 94,464	\$ -	\$ 200,000	\$ -	\$ 200,000	\$ -	\$ 311,662
IMPLEMENTATION PER YEAR:						1.06							
Softball Diamonds						0.85							
Park Shelters							0.45						
Multi-use / Nature Pathways (miles)								6.67			6.67		10.39
Park / Open Space Acres													

Appendix

- *Appendix A: Indiana Code (IC) 36-7-4-1300*
- *Appendix B: Fixed Assets / Capital Improvements over the years 2014-2018
(This information is a requirement of the State Statute [IC 36-7-4-1318 (b)(6)])*
- *Appendix C: Summary of Shelbyville Park Department Revenues 2014-2018
(This information is a requirement of the State Statute [IC 36-7-4-1318 (c)(3)])*
- *Appendix D: Impact Fee One Zone Recommendation Logic*
- *Appendix E: Park and Recreation Infrastructure Inventory*
- *Appendix F: Letter of Study Review from Professional Engineer
(This information is a requirement of the State Statute [IC 36-7-4-1318(d)])*



Appendix A: INDIANA CODE (IC) 36-7-4-1300

INDIANA SERIES IMPACT FEES
INDIANA CODE (IC) 36-7-4-1300

Assembled by:



INDIANA SERIES IMPACT FEES

INDIANA CODE (IC) 36-7-4-1300

IC 36-7-4-1300

Sec. 1300.

This series (sections 1300 through 1399 of this chapter) may be cited as follows: 1300 SERIES IMPACT FEES. *As added by P.L.221-1991, Sec.1.*

IC 36-7-4-1301

Sec. 1301.

As used in this series, "community level of service" means a quantitative measure of the service provided by the infrastructure that is determined by a unit to be appropriate.

As added by P.L.221-1991, Sec.2.

IC 36-7-4-1302

Sec. 1302.

As used in this series, "current level of service" means a quantitative measure of service provided by existing infrastructure to support existing development.

As added by P.L.221-1991, Sec.3.

IC 36-7-4-1303

Sec. 1303.

As used in this series, "development" means an improvement of any kind on land.

As added by P.L.221-1991, Sec.4.

IC 36-7-4-1304

Sec. 1304.

(a) As used in this series, "fee payer" means the following:

- (1) A person who has paid an impact fee.
- (2) A person to whom a person who paid an impact fee has made a written assignment of rights concerning the impact fee.
- (3) A person who has assumed by operation of law the rights concerning an impact fee.

(b) As used in this series, "person" means an individual, a sole proprietorship, a partnership, an association, a corporation, a fiduciary, or any other entity. *As added by P.L.221-1991, Sec.5.*

IC 36-7-4-1305

Sec. 1305.

(a) As used in this series, "impact fee" means a monetary charge imposed on new development by a unit to defray or mitigate the capital costs of infrastructure that is required by, necessitated by, or needed to serve the new development.

(b) As used in this Section, "capital costs" means the costs incurred to provide additional infrastructure to serve new development, including the following:

- (1) Directly related costs of construction or expansion of infrastructure that is necessary to serve the new development, including reasonable design, survey, engineering, environmental, and other professional fees that are directly related to the construction or expansion.
- (2) Directly related land acquisition costs, including costs incurred for the following:
 - (A) Purchases of interests in land.
 - (B) Court awards or settlements.
 - (C) Reasonable appraisal, relocation service, negotiation service, title insurance, expert witness, attorney, and other professional fees that are directly related to the land acquisition.
- (3) Directly related debt service, subject to Section 1330 of this chapter.
- (4) Directly related expenses incurred in preparing or updating the comprehensive plan or zone improvement plan, including all administrative, consulting attorney, and other professional fees, as limited by Section 1330 of this chapter. *As added by P.L.221-1991, Sec.6.*

IC 36-7-4-1306

Sec. 1306.

Shelbyville Recreation Zone Improvement Plan Study

As used in this series, "impact fee ordinance" means an ordinance adopted under Section 1311 of this chapter. *As added by P.L.221-1991, Sec.7.*

IC 36-7-4-1307

Sec. 1307.

As used in this series, "impact zone" means a geographic area designated under Section 1315 of this chapter. *As added by P.L.221-1991, Sec.8.*

IC 36-7-4-1308

Sec. 1308.

As used in this series, "infrastructure" means the capital improvements that:

- (1) comprise:
 - (A) a sanitary sewer system or wastewater treatment facility;
 - (B) a park or recreational facility;
 - (C) a road or bridge;
 - (D) a drainage or flood control facility; or
 - (E) a water treatment, water storage, or water distribution facility;
- (2) are:
 - (A) owned solely for a public purpose by:
 - (i) a unit; or
 - (ii) a corporation created by a unit; or
 - (B) leased by a unit solely for a public purpose; and
- (3) are included in the zone improvement plan of the impact zone in which the capital improvements are located. The term includes site improvements or interests in real property needed for a facility listed in subdivision (1). *As added by P.L.221-1991, Sec.9.*

IC 36-7-4-1309

Sec. 1309.

As used in this series, "infrastructure type" means any of the following types of infrastructure covered by an impact fee

ordinance:

- (1) Sewer, which includes sanitary sewerage and wastewater treatment facilities.
- (2) Recreation, which includes parks and other recreational facilities.
- (3) Road, which includes public ways and bridges.
- (4) Drainage, which includes drains and flood control facilities.
- (5) Water, which includes water treatment, water storage, and water distribution facilities.

As added by P.L.221-1991, Sec.10.

IC 36-7-4-1310

Sec. 1310.

As used in this series, "infrastructure agency" means a political subdivision or an agency of a political subdivision responsible for acquiring, constructing, or providing a particular infrastructure type. *As added by P.L.221-1991, Sec.11.*

IC 36-7-4-1311

Sec. 1311.

- (a) The legislative body of a unit may adopt an ordinance imposing an impact fee on new development in the geographic area over which the unit exercises planning and zoning jurisdiction. The ordinance must aggregate the portions of the impact fee attributable to the infrastructure types covered by the ordinance so that a single and unified impact fee is imposed on each new development.
- (b) If the legislative body of a unit has planning and zoning jurisdiction over the entire geographic area covered by the impact fee ordinance, an ordinance adopted under this Section shall be adopted in the same manner that zoning ordinances are adopted under the 600 SERIES of this chapter.
- (c) If the legislative body of a unit does not have planning and zoning jurisdiction over the entire geographic area covered by the impact fee

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ordinance but does have jurisdiction over one (1) or more infrastructure types in the area, the legislative body shall establish the portion of the impact fee schedule or formula for the infrastructure types over which the legislative body has jurisdiction. The legislative body of the unit having planning and zoning jurisdiction shall adopt an impact fee ordinance containing that portion of the impact fee schedule or formula if:

- (1) a public hearing has been held before the legislative body having planning and zoning jurisdiction; and
 - (2) each plan commission that has planning jurisdiction over any part of the geographic area in which the impact fee is to be imposed has approved the proposed impact fee ordinance by resolution.
- (d) An ordinance adopted under this Section is the exclusive means for a unit to impose an impact fee. An impact fee imposed on new development to pay for infrastructure may not be collected after January 1, 1992, unless the impact fee is imposed under an impact fee ordinance adopted under this chapter.
- (e) Notwithstanding any other provision of this chapter, the following charges are not impact fees and may continue to be imposed by units:
- (1) Fees, charges, or assessments imposed for infrastructure services under statutes in existence on January 1, 1991, if:
 - (A) the fee, charge, or assessment is imposed upon all users whether they are new users or users requiring additional capacity or services;
 - (B) the fee, charge, or assessment is not used to fund construction of new infrastructure unless the new infrastructure is of the same type for which the fee, charge, or assessment is imposed and will serve the payer; and
 - (C) the fee, charge, or assessment constitutes a reasonable charge for the services provided in accordance with IC 36-1-3-8(6) or other governing statutes

requiring that any fees, charges, or assessments bear a reasonable relationship to the infrastructure provided.

- (2) Fees, charges, and assessments agreed upon under a contractual agreement entered into before April 1, 1991, or fees, charges, and assessments agreed upon under a contractual agreement, if the fees, charges, and assessments are treated as impact deductions under Section 1321(d) of this chapter if an impact fee ordinance is in effect. *As added by P.L.221-1991, Sec.12.*

IC 36-7-4-1312

Sec. 1312.

- (a) A unit may not adopt an impact fee ordinance under Section 1311 of this series unless the unit has adopted a comprehensive plan under the 500 SERIES of this chapter for the geographic area over which the unit exercises planning and zoning jurisdiction.
- (b) Before the adoption of an impact fee ordinance under Section 1311 of this chapter, a unit shall establish an impact fee advisory committee. The advisory committee shall:
 - (1) be appointed by the executive of the unit;
 - (2) be composed of not less than five (5) and not more than ten (10) members with at least forty percent (40%) of the membership representing the development, building, or real estate industries; and
 - (3) serve in an advisory capacity to assist and advise the unit with regard to the adoption of an impact fee ordinance under Section 1311 of this chapter.
- (c) A planning commission or other committee in existence before the adoption of an impact fee ordinance that meets the membership requirements of subsection (b) may serve as the advisory committee that subsection (b) requires.
- (d) Action of an advisory committee established under subsection (b) is not required as a prerequisite for the unit in adopting an impact

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fee ordinance under Section 1311 of this chapter.

As added by P.L.221-1991, Sec.13.

IC 36-7-4-1313

Sec. 1313.

This series does not prohibit a unit from doing any of the following:

- (1) Imposing a charge to pay the administrative, plan review, or inspection costs associated with a permit for development.
- (2) Imposing, pursuant to a written commitment or agreement and as a condition or requirement attached to a development approval or authorization (including permitting or zoning decisions), an obligation to dedicate, construct, or contribute goods, services, land or interests in land, or infrastructure to a unit or to an infrastructure agency. However, if the unit adopts or has already adopted an impact fee ordinance under Section 1311 of this chapter the following apply:
 - (A) The person dedicating, contributing, or providing an improvement under this subsection is entitled to a credit for the improvement under Section 1335 of this chapter.
 - (B) The cost of complying with the condition or requirement imposed by the unit under this subdivision may not exceed the impact fee that could have been imposed by the unit under Section 1321 of this chapter for the same infrastructure.
- (3) Imposing new permit fees, charges, or assessments or amending existing permit fees, charges, or assessments. However, the permit fees, charges, or assessments must meet the requirements of Section 1311 (e) (1) (A), 1311 (e) (1) (B), and 1311 (e) (1) (C) of this chapter. *As added by P.L.221-1991, Sec.14.*

IC 36-7-4-1314

Sec. 1314.

- (a) Except as provided in subsection (b), an impact fee ordinance must apply to any development:
 - (1) that is in an impact zone; and
 - (2) for which a unit may require a structural building permit.
- (b) An impact fee ordinance may not apply to an improvement that does not create a need for additional infrastructure, including the erection of a sign, the construction of a fence, or the interior renovation of a building not resulting in a change in use. *As added by P.L.221-1991, Sec.15.*

IC 36-7-4-1315

Sec. 1315.

- (a) An impact fee ordinance must establish an impact zone, or a set of impact zones, for each infrastructure type covered by the ordinance. An impact zone established for a particular infrastructure type is not required to be congruent with an impact zone established for a different infrastructure type.
- (b) An impact zone may not extend beyond the jurisdictional boundary of an infrastructure agency responsible for the infrastructure type for which the impact zone was established, unless an agreement under IC 36-1-7 is entered into by the infrastructure agencies.
- (c) If an impact zone, or a set of impact zones, includes a geographic area containing territory from more than one (1) planning and zoning jurisdiction, the applicable legislative bodies and infrastructure agencies shall enter into an agreement under IC 36-1-7 concerning the collection, division, and distribution of the fees collected under the impact fee ordinance. *As added by P.L.221-1991, Sec.16.*

IC 36-7-4-1316

Sec. 1316.

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A unit must include in an impact zone designated under Section 1315 of this chapter the geographical area necessary to ensure that:

- (1) there is a functional relationship between the components of the infrastructure type in the impact zone;
- (2) the infrastructure type provides a reasonably uniform benefit throughout the impact zone; and
- (3) all areas included in the impact zone are contiguous. *As added by P.L.221-1991, Sec.17.*

IC 36-7-4-1317

Sec. 1317.

A unit must identify in the unit's impact fee ordinance the infrastructure agency that is responsible for acquiring, constructing, or providing each infrastructure type included in the impact fee ordinance. *As added by P.L.221-1991, Sec.18.*

IC 36-7-4-1318

Sec. 1318.

- (a) A unit may not adopt an impact fee ordinance under Section 1311 of this chapter unless the unit has prepared or substantially updated a zone improvement plan for each impact zone during the immediately preceding one (1) year period. A single zone improvement plan may be used for two (2) or more infrastructure types if the impact zones for the infrastructure types are congruent.
- (b) Each zone improvement plan must contain the following information:
 - (1) A description of the nature and location of existing infrastructure in the impact zone.
 - (2) A determination of the current level of service.
 - (3) Establishment of a community level of service. A unit may provide that the unit's current level of service is the unit's community level of service in the zone improvement plan.

- (4) An estimate of the nature and location of development that is expected to occur in the impact zone during the following ten (10) year period.
 - (5) An estimate of the nature, location, and cost of infrastructure that is necessary to provide the community level of service for the development described in subdivision. The plan must indicate the proposed timing and sequencing of infrastructure installation.
 - (6) A general description of the sources and amounts of money used to pay for infrastructure during the previous five (5) years.
- (c) If a zone improvement plan provides for raising the current level of service to a higher community level of service, the plan must:
 - (1) provide for completion of the infrastructure that is necessary to raise the current level of service to the community level of service within the following ten (10) year period;
 - (2) indicate the nature, location, and cost of infrastructure that is necessary to raise the current level of service to the community level of service; and
 - (3) identify the revenue sources and estimate the amount of the revenue sources that the unit intends to use to raise the current level of service to the community level of service for existing development. Revenue sources include, without limitation, any increase in revenues available from one (1) or more of the following:
 - (A) Adopting or increasing the following:
 - (i) The county adjusted gross income tax.
 - (ii) The county option income tax.
 - (iii) The county economic development income tax.
 - (iv) The annual license excise surtax.
 - (v) The wheel tax.
 - (B) Imposing the property tax rate per one hundred dollars (\$100) of assessed

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valuation that the unit may impose to create a cumulative capital improvement fund under IC 36-9-14.5 or IC 36-9-15.5.

- (C) Transferring and reserving for infrastructure purposes other general revenues that are currently not being used to pay for capital costs of infrastructure.
- (D) Dedicating and reserving for infrastructure purposes any newly available revenues, whether from federal or state revenue sharing programs or from the adoption of newly authorized taxes.

- (d) A unit must consult with a qualified engineer licensed to perform engineering services in Indiana when the unit is preparing the portions of the zone improvement plan described in subsections (b) (1), (b) (2), (b) (5), and (c) (2).
- (e) A zone improvement plan and amendments and modifications to the zone improvement plan become effective after adoption as part of the comprehensive plan under the 500 SERIES of this chapter or adoption as part of the capital improvements program under Section 503(5) of this chapter. If the unit establishing the impact fee schedule or formula and establishing the zone improvement plan is different from the unit having planning and zoning jurisdiction, the unit having planning and zoning jurisdiction shall incorporate the zone improvement plan as part of the unit's comprehensive plan and capital improvement plan.
- (f) If a unit's zone improvement plan identifies revenue sources for raising the current level of service to the community level of service, impact fees may not be assessed or collected by the unit unless:
 - (1) before the effective date of the impact fee ordinance the unit has available or has adopted the revenue sources that the zone improvement plan specifies will be in effect before the impact fee ordinance becomes effective; and

- (2) after the effective date of the impact fee ordinance the unit continues to provide adequate funds to defray the cost of raising the current level of service to the community level of service, using revenue sources specified in the zone improvement plan or revenue sources other than impact fees. *As added by P.L.221-1991, Sec.19.*

IC 36-7-4-1319

Sec. 1319.

- (a) A unit shall amend a zone improvement plan to make adjustments in the nature, location, and cost of infrastructure and the timing or sequencing of infrastructure installations to respond to the nature and location of development occurring in the impact zone. Appropriate planning and analysis shall be carried out before an amendment is made to a zone improvement plan.
- (b) A unit may not amend an impact fee ordinance if the amendment makes a significant change in an impact fee schedule or formula or if the amendment designates an impact zone or alters the boundary of a zone, unless a new or substantially updated zone improvement plan has been approved within the immediately preceding one (1) year period. *As added by P.L.221-1991, Sec.20.*

IC 36-7-4-1320

Sec. 1320.

- (a) An impact fee ordinance must include:
 - (1) a schedule prescribing for each impact zone the amount of the impact fee that is to be imposed for each infrastructure type covered by the ordinance; or
 - (2) a formula for each impact zone by which the amount of the impact fee that is to be imposed for each infrastructure type covered by the ordinance may be derived.
- (b) A schedule or formula included in an impact fee ordinance must provide an objective and uniform standard for calculating impact fees

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that allows fee payers to accurately predict the impact fees that will be imposed on new development. *As added by P.L.221-1991, Sec.21.*

IC 36-7-4-1321

Sec. 1321.

- (a) An impact fee schedule or formula described in Section 1320 of this chapter shall be prepared so that the impact fee resulting from the application of the schedule or formula to a development meets the requirements of this Section. However, this section does not require that a particular methodology be used in preparing the schedule or formula.
- (b) As used in this Section, “impact costs” means a reasonable estimate, made at the time the impact fee is assessed, of the proportionate share of the costs incurred or to be incurred by the unit in providing infrastructure of the applicable type in the impact zone that are necessary to provide the community level of service for the development. The amount of impact costs may not include the costs of infrastructure of the applicable type needed to raise the current level of service in the impact zone to the community level of service in the impact zone for development that is existing at the time the impact fee is assessed.
- (c) As used in this Section, “non-local revenue” means a reasonable estimate, made at the time the impact fee is assessed, of revenue that:
 - (1) will be received from any source (including but not limited to state or federal grants) other than a local government source; and
 - (2) is to be used within the impact zone to defray the capital costs of providing infrastructure of the applicable type.
- (d) As used in this Section, “impact deductions” means a reasonable estimate, made at the time the impact fee is assessed, of the amounts from the following sources that will be paid during the ten (10) year period after assessment of the impact fee to defray the capital costs of providing infrastructure of the applicable types

to serve a development:

- (1) Taxes levied by the unit or on behalf of the unit by an applicable infrastructure agency that the fee payer and future owners of the development will pay for use within the geographic area of the unit.
- (2) Charges and fees, other than fees paid by the fee payer under this chapter, that are imposed by any of the following for use within the geographic area of the unit:
 - (A) An applicable infrastructure agency.
 - (B) A governmental entity.
 - (C) A not-for-profit corporation created for governmental purposes. Charges and fees covered by this subdivision include tap and availability charges paid for extension of services or the provision of infrastructure to the development.
- (e) An impact fee on a development may not exceed:
 - (1) impact costs; minus
 - (2) the sum of non-local revenues and impact deductions. *As added by P.L.221-1991, Sec.22.*

IC 36-7-4-1322

Sec. 1322.

- (a) Except as provided in subsection (b), an impact fee ordinance must require that, if the fee payer requests, an impact fee on a development must be assessed not later than thirty (30) days after the earlier of:
 - (1) the date the fee payer obtains an improvement location permit for the development; or
 - (2) the date that the fee payer voluntarily submits to the unit a development plan for the development and evidence that the property is properly zoned for the proposed development. The plan shall be in the form prescribed by the unit’s zoning ordinance and shall contain reasonably sufficient detail for the unit to calculate the impact fee.

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- (b) An impact fee ordinance may provide that if a proposed development is of a magnitude that will require revision of the zone improvement plan in order to appropriately serve the new development, the unit shall revise the unit's zone improvement plan and shall assess an impact fee on a development not later than one hundred eighty (180) days after the earlier of the following:
- (1) The date on which the fee payer obtains an improvement location permit for the development.
 - (2) The date on which the fee payer submits to the unit a development plan for a development and evidence that the property is properly zoned for the proposed development. The development plan must be in the form prescribed by the unit's zoning ordinance and must contain reasonably sufficient detail for the unit to calculate the impact fee.
- (c) An impact fee assessed under subsections (a) or (b) may be increased only if the structural building permit has not been issued for the development and the requirements of subsection (d) are satisfied. In the case of a phased development, only a portion of an impact fee assessed under subsection (a) or (b) that is attributable to the portion of the development for which a permit has not been issued may be increased if the requirements of subsection (d) are satisfied.
- (d) Unless the improvement location permit or development plan originally submitted for the development is changed so that the amount of impact on infrastructure the development creates in the impact zone is significantly increased, an impact fee assessed under: (1) subsection (a) (1) or (b) (1) may not be increased for the period of the improvement location permit's validity; and
- (e) An impact fee assessed under subsection (a) or (b) shall be decreased if the improvement location permit or development plan originally submitted for the development is changed so that the amount of impact on infrastructure that the development creates in the impact zone is significantly decreased. If a change occurs in the permit or plan that results in a decrease in the amount of the impact fee after the fee has been paid, the unit that collected the fee shall immediately refund the amount of the overpayment to the fee payer.
- (f) If the unit fails to assess an impact fee within the period required by subsection (a) or (b), the unit may not assess an impact fee on the development unless the development plan originally submitted for the development is materially and substantially changed.
- (g) Notwithstanding other provisions in this chapter, a unit may not assess an impact fee against a development if:
- (1) an improvement location permit has been issued for all or a part of a development before adoption of an impact fee ordinance that is in compliance with this chapter; and
 - (2) the development satisfies all of the following criteria:
 - (A) The development is zoned for commercial or industrial use before January 1, 1991.
 - (B) The development will consist primarily of new buildings or structures. As used in this clause, the term "new buildings or structures" does not include additions or expansions of existing buildings or structures.
 - (C) The parts of the development for which a structural building permit has not been issued are owned or controlled by the person that owned or controlled the development on January 1, 1991.
 - (D) A structural building permit is issued for the development not more than four (4) years after the effective date of the impact fee ordinance.
 - (E) The development is part of a common scheme of development that:
 - (i) involves land that is contiguous;

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- (ii) involves a plan for development that includes a survey of the land, engineering drawings, and a site plan showing the anticipated size, location, and use of buildings and the anticipated location of streets, sewers, and drainage;
 - (iii) if plan approval is required, resulted in an application being filed with an appropriate office, commission, or official of the unit before January 1, 1991, that resulted or may result in approval of any phase of the development plan referred to in item (ii);
 - (iv) has been diligently pursued since January 1, 1991;
 - (v) resulted before January 1, 1991, in a substantial investment in creating, publicizing, or implementing the common scheme of development; and
 - (vi) involved the expenditure of significant funds before January 1, 1991, for the provision of improvements, such as roads, sewers, water treatment facilities, water storage facilities, water distribution facilities, drainage systems, or parks, that are on public lands or are available for other development in the area.
- (h) Notwithstanding any other provision of this chapter, this chapter does not impair the validity of any contract between a unit and a fee payer that was:
- (1) entered into before January 1, 1991; and
 - (2) executed in consideration of zoning amendments or annexations requested by the fee payer.

As added by P.L.221-1991, Sec.23.

IC 36-7-4-1323

Sec. 1323.

- (a) Except as provided in Section 1324 of this chapter, an impact fee assessed in compliance with Section 1322 of this chapter is due and payable on the date of issuance of the structural building permit for the new development on which the impact fee is imposed.
- (b) For a phased development, an impact fee shall be prorated for purposes of payment according to the impact of the parcel for which a structural building permit is issued in relation to the total impact of the development. In accordance with Section 1324 of this chapter, only the prorated portion of the assessed impact fee is due and payable on the issuance of the permit.
- (c) If an impact fee ordinance is repealed, lapses, or becomes ineffective after the assessment of an impact fee on a development but before the issuance of the structural building permit for part or all of the development:
 - (1) any part of the impact fee attributable to the part of the development for which a structural building permit has not been issued is void and is not due and payable, in the case of a phased development; and
 - (2) the entire impact fee is void and is not due and payable, in the case of a development other than a phased development. *As added by P.L.221-1991, Sec. 24.*

IC 36-7-4-1324

Sec. 1324.

- (a) An impact fee ordinance must include an installment payment plan. The installment payment plan must at least offer a fee payer the option of paying part of an impact fee in equal installment payments if the impact fee is greater than five thousand dollars (\$5,000). In an installment plan under this Section:
 - (1) a maximum of five thousand dollars (\$5,000) or five percent (5%) of the impact fee, whichever is greater, may become payable on the date the structural building permit is issued for the development on which the fee is imposed;
 - (2) the first installment may not become due

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and payable less than one (1) year after the date the structural building permit is issued for the development on which the fee is imposed; and

- (3) the last installment may not be due and payable less than two (2) years after the date the structural building permit is issued for the development on which the fee is imposed.
- (b) An impact fee ordinance may require an impact fee of five thousand dollars (\$5,000) or less to be paid in full on the date the structural building permit is issued for the development on which the impact fee is imposed.
- (c) An impact fee ordinance may provide that a reasonable rate of interest, not to exceed the prejudgment rate of interest in effect at the time the interest accrues, may be charged if the fee payer elects to pay in installments. If interest is charged, the ordinance must provide that interest accrues only on the portion of the impact fee that is outstanding and does not begin to accrue until the date the structural building permit is issued for the development or the part of the development on which the impact fee is imposed.
- (d) An impact fee ordinance may provide that if all or part of an installment is not paid when due and payable, the amount of the installment shall be increased on the first day after the installment is due and payable by a penalty amount equal to ten percent (10%) of the installment amount that is overdue. If interest is charged under subsection (c), the interest shall be charged on the penalty amount. *As added by P.L.221-1991, Sec. 25.*

IC 36-7-4-1325

Sec. 1325.

- (a) A unit may use any legal remedy to collect an impact fee imposed by the unit. A unit must bring an action to collect an impact fee and all penalties, costs, and collection expenses associated with a fee not later than ten (10) years after the fee or the prorated portion of the

impact fee first becomes due and payable.

- (b) On the date a structural building permit is issued for the development of property on which the impact fee is assessed, the unit acquires a lien on the real property for which the permit is issued. For a phased development, the amount of the lien may not exceed the prorated portion of the impact fee due and payable in one (1) or more installments at the time the structural building permit is issued.
- (c) A lien acquired by a unit under this Section is not affected by a sale or transfer of the real property subject to the lien, including the sale, exchange, or lease of the real property under IC 36-1-11.
- (d) A lien acquired by a unit under this Section continues for ten (10) years after the impact fee or the prorated portion of the impact fee becomes due and payable. However, if an action to enforce the lien is filed within the ten (10) year period, the lien continues until the termination of the proceeding.
- (e) A holder of a lien of record on any real property on which an impact fee is delinquent may pay the delinquent impact fee and any penalties and costs. The amount paid by the lien holder is an additional lien on the real property in favor of the lien holder and is collectible in the same manner as the original lien.
- (f) If a person pays an impact fee assessed against any real property, the person is entitled to a receipt for the payment that is:
 - (1) on a form prescribed by the impact fee ordinance; and
 - (2) issued by a person designated in the impact fee ordinance. *As added by P.L.221-1991, Sec.26.*

IC 36-7-4-1326

Sec. 1326.

- (a) An impact fee ordinance may provide for a reduction in an impact fee for housing development that provides sale or rental housing, or both, at a price that is affordable to

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an individual or a family earning less than eighty percent (80%) of the median income for the county in which the housing development is located. If the housing development comprises more than one (1) residential unit, the impact fee reduction shall apply only to the residential units that are affordable to an individual or a family earning less than eighty percent (80%) of the median income of the county.

- (b) If the impact fee ordinance provides for a reduction in an impact fee under subsection (a), the ordinance must:
- (1) contain a schedule or formula that sets forth the amount of the fee reduction for various types of housing development specified in subsection (a);
 - (2) require that, as a condition of receiving the fee reduction, the owner execute an agreement that:
 - (A) is binding for a period of at least five (5) years on the owner and subsequent owners; and
 - (B) limits the tenancy of residential units receiving the fee reduction to individuals or families who at the time the tenancy is initiated are earning less than eighty percent (80%) of the median income of the county;
 - (3) contain standards to be used in determining if a particular housing development specified in subsection (a) will receive a fee reduction; and
 - (4) designate a board or an official of the unit to conduct the hearing required by subsection (c).
- (c) A fee reduction authorized by this Section must be approved by a board or official of the unit at a public hearing. *As added by P.L.221-1991, Sec.27.*

IC 36-7-4-1327

Sec. 1327. An impact fee ordinance must provide a procedure through which the fee reduction decision

made under Section 1326 of this chapter may be appealed by the following persons:

- (1) The person requesting the fee reduction.
- (2) An infrastructure agency responsible for infrastructure of the applicable type for the impact zone in which the impact fee reduction is granted. *As added by P.L.221-1991, Sec.28.*

IC 36-7-4-1328

Sec. 1328.

A unit that provides a fee reduction under Section 1326 of this chapter shall pay into the account or accounts established for the impact zone in which the fee was reduced an amount equal to the amount of the fee reduction. *As added by P.L.221-1991, Sec.29.*

IC 36-7-4-1329

Sec. 1329.

- (a) A unit imposing an impact fee shall establish a fund to receive amounts collected under this series.
- (b) Money in a fund established under subsection (a) at the end of the unit's fiscal year remains in the fund. Interest earned by the fund shall be deposited in the fund.
- (c) The fiscal officer of the unit shall manage the fund according to the provisions of this series. The fiscal officer shall annually report to the unit's plan commission and to each infrastructure agency responsible for infrastructure in an impact zone. The report must include the following:
 - (1) The amount of money in accounts established for the impact zone.
 - (2) The total receipts and disbursements of the accounts established for the impact zone.
- (d) A separate account shall be established in the fund for each impact zone established by the unit and for each infrastructure type within each zone. Interest earned by an account shall be deposited in that account. *As added by P.L.221-1991, Sec.30.*

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IC 36-7-4-1330

Sec. 1330.

An impact fee collected under this series shall be used for the following purposes:

- (1) Providing funds to an infrastructure agency for the provision of new infrastructure that:
 - (A) is necessary to serve the new development in the impact zone from which the fee was collected; and
 - (B) is identified in the zone improvement plan.
- (2) In an amount not to exceed five percent (5%) of the annual collections of an impact fee, for expenses incurred by the unit that paid for the consulting services that were used to establish the impact fee ordinance.
- (3) Payment of a refund under Section 1332 of this chapter.
- (4) Payment of debt service on an obligation issued to provide infrastructure described in subdivision (1). *As added by P.L.221-1991, Sec.31.*

IC 36-7-4-1331

Sec. 1331.

- (a) An infrastructure agency shall, within the time described in the zone improvement plan, construct infrastructure for which:
 - (1) a zone improvement plan has been adopted;
 - (2) an impact zone has been established; and
 - (3) an impact fee has been collected.
- (b) A unit may amend the unit's zone improvement plan, including the time provided in the plan for construction of infrastructure, only if the amount of expenditures provided for the construction of infrastructure in the original plan does not decrease in any year and the benefit to the overall impact zone does not decrease because of the amendment. *As added by P.L.221-1991, Sec.32.*

IC 36-7-4-1332

Sec. 1332.

- (a) A fee payer is entitled to a refund of an impact fee if an infrastructure agency:
 - (1) has failed to complete a part of the infrastructure for which the impact fee was imposed not later than:
 - (A) twenty-four (24) months after the time described in Section 1331 of this chapter; or
 - (B) a longer time as is reasonably necessary to complete the infrastructure if unforeseeable and extraordinary circumstances that are not in whole or in part caused by the unit have delayed the construction;
 - (2) has unreasonably denied the fee payer the use and benefit of the infrastructure during the useful life of the infrastructure; or
 - (3) has failed within the earlier of:
 - (A) six (6) years after issuance of the structural building permit; or
 - (B) the anticipated infrastructure completion date as specified in the zone improvement plan existing on the date the impact fee was collected; to make reasonable progress toward completion of the specific infrastructure for which the impact fee was imposed or thereafter fails to make reasonable progress toward completion.
- (b) An application for a refund under subsection (a) must be filed with the unit that imposed the impact fee not later than two (2) years after the right to a refund accrues. A unit shall issue a refund in part or in full or shall reject the application for refund not later than thirty (30) days after receiving an application for a refund.
- (c) If a unit approves a refund in whole or in part, the unit shall pay the amount approved, plus interest from the date on which the impact fee was paid to the date the refund is issued. The interest rate shall be the same rate as the rate that the unit's impact fee ordinance provides for

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impact fee payments paid in installments.

- (d) If a unit rejects an application for refund or approves only a partial refund, the fee payer may appeal not later than sixty (60) days after the rejection or partial approval to the unit's impact fee review board established under Section 1338 of this chapter by filing with the board an appeal on a form prescribed by the board. The board shall issue instructions for completion of the form. The form and the instructions must be clear, simple, and understandable to a lay person.
- (e) An impact fee ordinance shall designate the employee or official of the unit who is responsible for accepting, rejecting, and paying a refund and interest.
- (f) A unit's impact fee review board shall hold a hearing on all appeals for a refund under this Section. The hearing shall be held not later than forty-five (45) days after the application for appeal is filed with the board. A unit's impact fee review board shall provide notice of the application for refund to the infrastructure agency responsible for the infrastructure for which the impact fee was imposed.
- (g) An impact fee review board holding a hearing under subsection (f) shall determine the amount of a refund that shall be made to the fee payer from the account established for the infrastructure for which the fee was imposed. A refund ordered by the board must include interest from the date the impact fee was paid to the date the refund is issued at the same rate the ordinance provides for impact fee payments paid in installments.
- (h) A party aggrieved by a final decision of an impact fee review board in a hearing under subsection (f) may appeal to the circuit or superior court of the county in which the unit is located and is entitled to a trial de novo. As added by P.L.221-1991, Sec.33.

IC 36-7-4-1333

Sec. 1333.

- (a) A person against whom an impact fee has been

assessed may appeal the amount of the impact fee. A unit may not deny issuance of a structural building permit on the basis that an impact fee has not been paid or condition issuance of the permit on the payment of an impact fee. However, in the case of an impact fee of one thousand dollars (\$1,000) or less a unit may require a fee payer to:

- (1) pay the impact fee; or
 - (2) bring an appeal under this Section; before the unit issues a structural building permit for the development for which the impact fee was assessed.
- (b) A person must file a petition for a review of the amount of an impact fee with the unit's impact fee review board not later than thirty (30) days after issuance of the structural building permit for the development for which the impact fee was assessed. An impact fee ordinance may require a petition to be accompanied by payment of a reasonable fee not to exceed one hundred dollars (\$100). A fee payer shall receive a full refund of the filing fee if:
 - (1) the fee payer prevails;
 - (2) the amount of the impact fee or the reductions or credits against the fee is adjusted by the unit, the board, or a court; and
 - (3) the body ordering the adjustment finds that the amount of the fee, reductions, or credits were arbitrary or capricious.
 - (c) A unit's impact fee review board shall prescribe the form of the petition for review of an impact fee under subsection (b). The board shall issue instructions for completion of the form. The form and the instructions must be clear, simple, and understandable to a lay person. The form must require the petitioner to specify:
 - (1) a description of the new development on which the impact fee has been assessed;
 - (2) all facts related to the assessment of the impact fee; and
 - (3) the reasons the petitioner believes that the amount of the impact fee assessed is

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erroneous or is greater than the amount allowed by the fee limitations set forth in this series.

- (d) A unit's impact fee review board shall prescribe a form for a response by a unit to a petition for review under this Section. The board shall issue instructions for completion of the form. The form must require the unit to indicate:
 - (1) agreement or disagreement with each item indicated on the petition for review under subsection (c); and
 - (2) the reasons the unit believes that the amount of the fee assessed is correct.
- (e) Immediately upon the receipt of a timely filed petition on the form prescribed under subsection (c), a unit's impact fee review board shall provide a copy of the petition to the unit assessing the impact fee. The unit shall not later than thirty (30) days after the receipt of the petition provide to the board a completed response to the petition on the form prescribed under subsection (d). The board shall immediately forward a copy of the response form to the petitioner.
- (f) An impact fee review board shall:
 - (1) review the petition and the response submitted under this Section; and
 - (2) determine the appropriate amount of the impact fee not later than thirty (30) days after submission of both petitions.
- (g) A fee payer aggrieved by a final determination of an impact fee review board may appeal to the circuit or superior court of the county in which the unit is located and is entitled to a trial de novo. If the assessment of a fee is vacated by judgment of the court, the assessment of the impact fee shall be remanded to the board for correction of the impact fee assessment and further proceedings in accordance with law.
- (h) If a petition for a review or an appeal of an impact fee assessment is pending, the impact fee is not due and payable until after the petition or appeal is finally adjudicated and the amount of the fee is determined. *As added by*

P.L.221-1991, Sec.34.

IC 36-7-4-1334

Sec. 1334.

An impact fee ordinance must set forth the reasons for which an appeal of the amount of an impact fee may be made. The impact fee ordinance must provide that an appeal of the amount of an impact fee may be made for the following reasons:

- (1) A fact assumption used in determining the amount of an impact fee is incorrect.
- (2) The amount of the impact fee is greater than the amount allowed under Sections 1320, 1321, and 1322 of this chapter. *As added by P.L.221-1991, Sec.35.*

IC 36-7-4-1335

Sec. 1335.

- (a) As used in this Section, "improvement" means an improvement under Section 1313(2) of this chapter or a site improvement, land, or real property interest as follows:
 - (1) That is to be used for at least one (1) of the infrastructure purposes specified in Section 1309 of this chapter.
 - (2) That is included in or intended to be used relative to an infrastructure type for which the unit has imposed an impact fee in the impact zone.
 - (3) That is not a type of improvement that is uniformly required by law or rule for the type of development on which the impact fee has been imposed.
 - (4) That is or will be:
 - (A) public property; or
 - (B) furnished or constructed under requirements of the unit and is or will be available for use by other development in the area.
 - (5) That is beneficial to existing development and future development in the impact zone and is not beneficial to only one (1) development.

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- (6) That either:
 - (A) allows the removal of a component of infrastructure planned for the impact zone;
 - (B) is a useful addition to the zone improvement plan; or
 - (C) is reasonably likely to be included in a future zone improvement plan for the impact zone.
- (7) That is:
 - (A) constructed, furnished, or guaranteed by a bond or letter of credit under a request by an authorized official of the:
 - (i) applicable infrastructure agency; or
 - (ii) unit that imposed the impact fee; or
 - (B) required to be constructed or furnished under a written commitment that:
 - (i) is requested by an authorized official of the applicable infrastructure agency or the unit that imposed the impact fee;
 - (ii) concerns the use or developing of the development against which the impact fee is imposed; and
 - (iii) is made under Section 613, 614, or 921 of this chapter.
- (b) A fee payer is entitled to a credit against an impact fee if the owner or developer of the development constructs or provides:
 - (1) infrastructure that is an infrastructure type for which the unit imposed an impact fee in the impact zone; or
 - (2) an improvement.
- (c) A fee payer is entitled to a credit under this Section for infrastructure or an improvement that:
 - (1) is constructed or furnished relative to a development after January 1, 1989; and
 - (2) meets the requirements of this Section.
- (d) The amount of a credit allowed under this Section shall be determined at the date the impact fee is assessed. However, if an

assessment is not requested, the amount of the credit shall be determined at the time the structural building permit is issued. The amount of the credit shall be:

- (1) determined by the:
 - (A) person constructing or providing the infrastructure or improvement; and
 - (B) applicable infrastructure agency; and
- (2) equal to the sum of the following:
 - (A) The cost of constructing or providing the infrastructure or improvement.
 - (B) The fair market value of land, real property interests, and site improvements provided.
- (e) The amount of a credit may be increased or decreased after the date the impact fee is assessed if, between the date the impact fee is assessed and the date the structural building permit is issued, there is a substantial and material change in the cost or value of the infrastructure or improvement that is constructed or furnished from the cost or value determined under subsection (d) . However, at the time the amount of a credit is determined under subsection (d), the person providing the infrastructure or improvement and the applicable infrastructure agency may agree that the amount of the credit may not be changed. The person providing the infrastructure or improvement may waive the person's right to a credit under this Section. *As added by P.L.221-1991, Sec.36.*

IC 36-7-4-1336

Sec. 1336.

- (a) If the parties cannot agree on the cost or fair market value under Section 1335(d) of this chapter, the fee payer or the person constructing or providing the infrastructure or improvement may file a petition for determination of the amount of the credit with the unit's impact fee review board not later than thirty (30) days after the structural building permit is issued for the development on which

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the impact fee is imposed. A petition under this subsection may be made as part of an appeal proceeding under Section 1334 of this chapter or may be made under this Section.

- (b) An impact fee review board shall prescribe the form of the petition for determination of the amount of a credit under this Section. The board shall issue instructions for completion of the form. The form and the instructions must be clear, simple, and understandable to a lay person.
- (c) An impact fee review board shall prescribe a form for a response by the applicable infrastructure agency to a petition under this Section for determination of a credit amount. The board shall issue instructions for completion of the form.
- (d) Immediately after receiving a timely filed petition under this Section for determination of a credit amount, an impact fee review board shall provide a copy of the petition to the applicable infrastructure agency. Not later than thirty (30) days after receiving a copy of the petition, the infrastructure agency shall provide to the board a response on the form prescribed under subsection (c). The board shall immediately provide the petitioner with a copy of the infrastructure agency's response.
- (e) The impact fee review board shall:
 - (1) review a petition and response filed under this Section; and
 - (2) determine the amount of the credit not later than thirty (30) days after the response is filed.
- (f) A fee payer aggrieved by a final determination of an impact fee review board under this Section:
 - (1) may appeal to the circuit or superior court of the county in which the unit is located; and
 - (2) is entitled to a trial de novo. *As added by P.L.221-1991, Sec.37.*

IC 36-7-4-1337

Sec. 1337.

An impact fee ordinance shall do the following:

- (1) Establish a method for reasonably allocating credits to fee payers in situations in which the person providing infrastructure or an improvement is not the fee payer.
- (2) Allow the person providing infrastructure or an improvement to designate in writing a reasonable and administratively feasible method of allocating credits to future fee payers. *As added by P.L.221-1991, Sec.38.*

IC 36-7-4-1338

Sec. 1338.

- (a) Each unit that adopts an impact fee ordinance shall establish an impact fee review board consisting of three (3) citizen members appointed by the executive of the unit. A member of the board may not be a member of the plan commission. An impact fee ordinance must do the following:
 - (1) Set the terms the members shall serve on the board.
 - (2) Establish a procedure through which the unit's executive shall appoint a temporary replacement member meeting the qualifications of the member being replaced in the case of conflict of interest.
- (b) An impact fee review board must consist of the following members:
 - (1) One (1) member who is a real estate broker licensed in Indiana.
 - (2) One (1) member who is an engineer licensed in Indiana.
 - (3) One (1) member who is a certified public accountant.
- (c) An impact fee review board shall review the amount of an impact fee assessed, the amount of a refund, and the amount of a credit using the following procedures:
 - (1) The board shall fix a reasonable time for the hearing of appeals.

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- (2) At a hearing, each party may appear and present evidence in person, by agent, or by attorney.
- (3) A person may not communicate with a member of the board before the hearing with intent to influence the member's action on a matter pending before the board.
- (4) The board may reverse, affirm, modify, or otherwise establish the amount of an impact fee, a credit, a refund, or any combination of fees, credits, or refunds. For purposes of this subdivision, the board has all the powers of the official of the unit from which the appeal is taken.
- (5) The board shall decide a matter that the board is required to hear:
 - (A) at the hearing at which the matter is first presented; or
 - (B) at the conclusion of the hearing on the matter, if the matter is continued.
- (6) Within five (5) days after making a decision, the board shall provide a copy of the decision to the unit and the fee payer involved in the appeal.
- (7) The board shall make written findings of fact to support the board's decision. *As added by P.L.221-1991, Sec.39.*

IC 36-7-4-1339

Sec. 1339.

- (a) This Section applies to a person having an interest in real property that may be subject to an impact fee ordinance if the development occurs on the property.
- (b) A person may seek to:
 - (1) have a court determine under IC 34-26-1 any question of construction or validity arising under the impact fee ordinance; and
 - (2) obtain a declaration of rights, status, or other legal relations under the ordinance.
- (c) The validity of an impact fee ordinance adopted by a unit or the validity of the application of the ordinance in a specific impact zone may be

challenged under this Section on any of the following grounds:

- (1) The unit has not provided for a zone improvement plan in the unit's comprehensive plan.
- (2) The unit did not prepare or substantially update the unit's zone improvement plan in the year preceding the adoption of the impact fee ordinance.
- (3) The unit has not identified the revenue sources the unit intends to use to implement the zone improvement plan, if identification of the revenue sources is required under Section 1318 (c) of this chapter.
- (4) The unit has not complied with the requirements of Section 1318(f) of this chapter.
- (5) The unit has not made adequate revenue available to complete infrastructure improvements identified in the unit's zone improvement plan.
- (6) The impact fee ordinance imposes fees on new development that will not create a need for additional infrastructure.
- (7) The impact fee ordinance imposes on new development fees that are excessive in relation to the infrastructure needs created by the new development.
- (8) The impact fee ordinance does not allow for reasonable credits to fee payers.
- (9) The unit imposed a prohibition or delay on new development to enable the unit to complete the adoption of an impact fee ordinance.
- (10) The unit otherwise fails to comply with this series in the adoption of an impact fee ordinance. *As added by P.L.221-1991, Sec.40. Amended by P.L.1-1998, Sec.206.*

IC 36-7-4-1340

Sec. 1340.

- (a) An impact fee ordinance may take effect not

earlier than six (6) months after the date on which the impact fee ordinance is adopted by a legislative body.

- (b) An impact fee may not be collected under an impact fee ordinance more than five (5) years after the effective date of the ordinance. However, a unit may adopt a replacement impact fee ordinance if the replacement impact fee ordinance complies with the provisions of this series. *As added by P.L.221-1991, Sec.41.*

IC 36-7-4-1341

Sec. 1341.

A unit may not prohibit or delay new development to wait for the completion of all or a part of the process necessary for the development, adoption, or updating of an impact fee. *As added by P.L.221-1991, Sec.42.*

IC 36-7-4-1342

Sec. 1342.

The general assembly finds that the powers of a local governmental unit to permit and provide for infrastructure are not limited by the provisions of this chapter except as expressly provided in this chapter. *As added by P.L.221-1991, Sec.43.*

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Appendix B:

Fixed Assets / Capital Improvements over the years 2014-2018

[IC 36-7-4-1318 (b)(6)]

The following table illustrates the Fixed Assets / Capital Improvements implemented by the Shelbyville Park Department from 2014 to 2018. This information was provided by the City of Shelbyville.

Shelbyville Parks Department Infrastructure Capital Expenditures – 2014-2018				
General Description of Sources and Amounts of Money Used to Pay for Infrastructure During the Previous 5-Years [IC 36-7-4-1318(b)(6)]			4-Feb-19 Source: City of Shelbyville	
Infrastructure Expenditure Description and Location	Revenue/Fund Source	Amount (Approx.)	Year	Year Total
Universal Playground	Blue River Community Foundation	\$ 50,000.00	2014	
Universal Playground	Kellogg Foundation	\$ 50,000.00	2014	
			2014 Total	\$ 100,000.00
Blue River Trail Phase 1 and 2	INDOT	\$ 2,000,000.00	2015	
Trailhead at North 9th	Bicentennial Nature Trust	\$ 85,000.00	2015	
Trailhead at North 9th	Blue River Community Foundation	\$ 100,000.00	2015	
Cross Country Trail	Shelby County Tourism	\$ 100,000.00	2015	
			2015 Total	\$2,285,000.00
Kennedy and Sunset - Poured In Place Repairs	City Racino	\$ 17,700.00	2016	
Morrison Shop Roof	City Racino	\$ 5,000.00	2016	
Meridian Family Aquatics Center - Repair Pipes and Elec. Panels	City Racino	\$ 100,000.00	2016	
			2016 Total	\$ 122,700.00
Weaver Property - Purchase	City Racino	\$ 92,000.00	2017	
Musical Instruments Outdoors at Blue River Memorial Park	Blue River Community Foundaton	\$ 21,000.00	2017	
Kennedy Tennis Courts	City Racino	\$ 12,000.00	2017	
			2017 Total	\$ 125,000
The Meridian Athletic Complex	Shelby County Tourism	\$ 98,000.00	2018	
Pool Repairs	City Racino	\$ 68,000.00	2018	
Artwork	Blue River Community Found. & City	\$ 150,000.00	2018	
			2018 Total	\$ 316,000.00
TOTAL		\$ 2,948,700.00		



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Appendix C:

Summary of Shelbyville Park Department Revenues 2014-2018

[IC 36-7-4-1318 (c)(3)]

The following table illustrates the Park Department Revenues from 2014 to 2018. This information was provided by the City of Shelbyville.

City of Shelbyville – Park Department						
Park Department Revenues – 2014-2018						
Year	Real Property Tax Income	Program Balance	Grants	City EDIT / Racino	Contributions (Construction)	TOTALS
2014	\$ 1,101,362.00	\$ 10,577.45	\$ 2,285,000.00	\$ -	\$ -	\$ 3,396,939.45
2015	\$ 1,573,011.00	\$ 220,507.01	\$ -	\$ -	\$ -	\$ 1,793,518.01
2016	\$ 1,757,292.00	\$ 281,956.98	\$ -	\$ 167,000.00	\$ -	\$ 2,206,248.98
2017	\$ 1,819,139.00	\$ 307,554.09	\$ 21,000.00	\$ 104,000.00	\$ -	\$ 2,251,693.09
2018	\$ 2,013,533.00	\$ 250,644.29	\$ 248,000.00	\$ 168,000.00	\$ -	\$ 2,680,177.29
Totals	\$ 8,264,337.00	\$ 1,071,239.82	\$ 2,554,000.00	\$ 439,000.00	\$ -	\$ 12,328,576.82
5 Yr. Average	\$ 1,652,867.40	\$ 214,247.96	\$ 510,800.00	\$ 87,800.00	\$ -	\$ 2,465,715.36

Provided by: City of Shelbyville

Appendix D:

Impact Fee One Zone Recommendation Logic

An Impact Zone needs to be established for each recreation infrastructure type covered by the ordinance. In studying multi-zone options, it usually proves best to **establish a one Impact Fee Zone**. Refer to the below example of a one-zone vs. multi-zone option:

EXAMPLE

- Say one zone has 10 softball fields existing within it. The recreation standards when applied to the future population of that zone only requires 5 fields.
- Say in the next zone (which has no existing softball fields) when applying the recreation standards to its future population it calculates the need for 3 new fields.

Multiple Zones Sample	Zone A	Zone B
Existing Softball Inventory	10	0
Applied Softball Standard	5	3
Variance of Softball	5	(3)
	Surplus	Deficiency

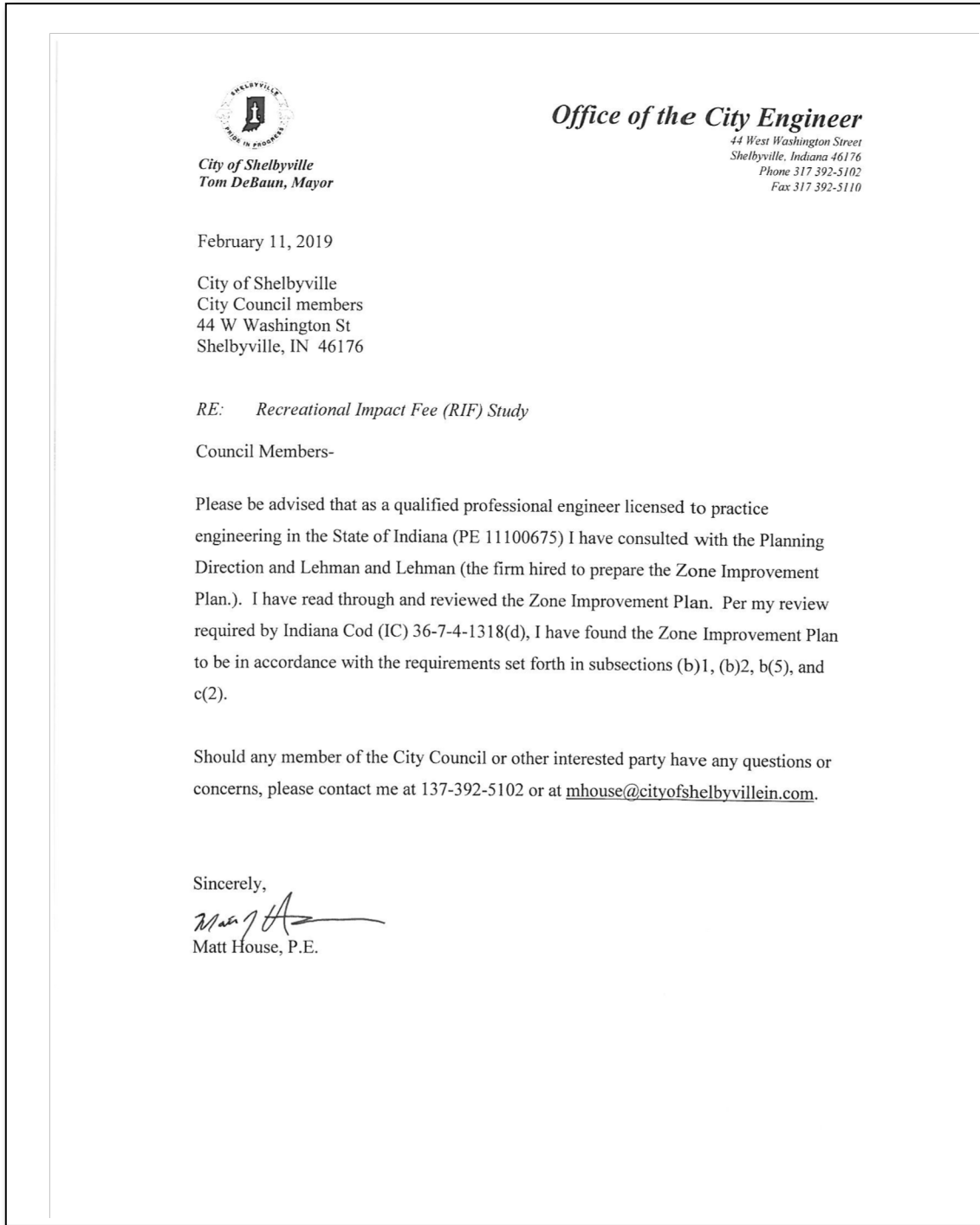
- If you would have multiple zones (using the above example) you would need to develop an additional 3 softball fields providing a total inventory of 13 (existing plus new) or a total surplus of 5.
- Yet if these two zones would be part of the same the existing inventory of 10 fields would be more than enough with future needs of only 8 fields (5 existing plus 3 new).

One Zone Sample	One Zone
Existing Softball Inventory	10
Applied Softball Standard	8
Variance of Softball	2
	Surplus

Appendix F:

Letter of Study Review from Professional Engineer

The following is the Letter of Study Review done by Matt House, P.E., Professional Engineer for the City of Shelbyville as per IC 36-7-4-1318(d).



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