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Ms. Kristen A. Shell, AICP
Planning Manager
Walton County
842 State Highway 20 E, Unit 110
Freeport, FL 32439

RE: WALTON COUNTY MOBILITY PLAN AND MOBILITY FEE SCOPE

Dear Kristen:

This Scope of Services is provided to develop an integrated Mobility Plan and Mobility Fee, along with a Mobility Fee Administrative Manual, that will meet all legal and statutory requirements. An effective Mobility Plan balances the mobility needs of residents, business and visitors and is designed to meet the multimodal travel demands from new growth over the next ten (10) to twenty (20) years. A Mobility Plan is an opportunity to transition from a transportation system focused on moving motor vehicles towards a multimodal transportation system that is focused on moving people and provide mobility choices. A mobility fee is a simplified, streamlined and equitable process for development to mitigate its transportation impact and is intend to replace transportation concurrency and proportionate fair share. The County may wish to consider still requiring new development and redevelopment to conduct a site access assessment that ensures project access connections function properly, that needed traffic control devices are provided and that multimodal connections are safely designed.

The following are the components necessary to prepare a legally defensible, technically sound Mobility Plan and Mobility Fee: (1) establish legislative intent in the Comprehensive Plan, (2) develop a mobility plan, (3) calculate a mobility fee, (4) adopt an implementing ordinance, (5) develop an administrative manual, (6) conduct an administrative fee study, (7) develop an administrative and implementation system, (8) update the Comprehensive Plan for internal consistency, and (9) update traffic impact analysis requirements to transition from a transportation concurrency analysis to a site access assessment. The following is the proposed scope of service for a Countywide Mobility Plan and Mobility Fee.



SCOPE OF SERVICE

Task 1: Evaluate Current Transportation Plans, Capital Improvements, Financial Program, and Proportionate Fair Share Program

Consultant will evaluate the current and projected future:

- Mobility plans,
- Concurrency management programs and requirements currently in place (Proportionate Fair Share),
- Transportation and Capital Improvements Element,
- Capital improvement project and plans,
- Long Range Transportation Plan,
- Transport Improvement Program,
- Travel demands, source of travel, existing traffic characteristics
- Current and planned infrastructure and system provided,
- Quality and level of service,
- Revenues from existing sources to provide system capacity (e.g. gasoline taxes, sales tax, tax increment), and
- Potential of currently unused revenue sources (e.g. ad-valorem based taxes, unused but available gas tax, and infrastructure surtax - assuming Charter County status)

Deliverable: Summary of the evaluation and its potential impact on growth management and economic development strategies, future financial needs and obligations of the transportation system and how development will mitigate its impact to the transportation system. *Staff will assist with providing current and previous plans and facilitate communications with County Departments to identify existing and potential revenue sources.*

Task 2: Consider Alternative Mobility Fee Structures

There are many options within each of these actions that will need to be assessed based on County goals, conditions of the current local tax regime, local capacity for a new program, and other County-specific considerations. Generally, this task will include the following activities:



- Evaluate the Future Land Use Element, Future Land Use Map, Existing Zoning Map and current development patterns.
- Confirm and refine the program goals based on Board of County Commissioner direction setting. Goals considered may be one of more of the following: supporting compact or mixed use development; providing greater transportation funding flexibility; implementing a more equitable alternative to proportionate fair share concurrency; increasing funding for multimodal facilities; facilitating economic development and preferred land uses; preserving place or character; and providing additional multimodal travel choices.
- Assess dual rational nexus, rough proportionality, and plan documentation. This includes evaluating, understanding and accounting for other taxes and fees to ensure double-taxation doesn't occur and the best way to establish benefits districts within the current regulatory framework.
- Confirm or identify the following basic parameters of the program and its administration:
 - The County maybe divided into separate Assessment Areas and shall be divided into separate Benefit Districts to ensure that revenues collected are expended to the benefit of those who pay fee assessments. Assessment Areas and Benefit Districts are based on differences in features such as: geography, land use, development pattern, corridor, municipalities, centers, etc.
 - Key stakeholders and responsible parties (transportation agencies, local development communities, government officials)
 - Land uses to be included on the mobility fee schedule include land uses the County Commissioner seeks to encourage and potentially the identification of land uses with a more significant impact on the transportation system.
 - Methodology to ensure that mobility fees are roughly proportional to the multimodal transportation impact of new development and redevelopment. Mobility fees are generally based on the multimodal level and quality of service standards, multimodal capacities, improvements, programs and



services identified in a mobility plan and assessed based upon person miles of travel (PMT) for specific land uses.

- Mobility Plan Projects – establish a plan horizon year and identify what types of improvements, programs and services could be funded by the mobility fee, such as sidewalks, paths, trails, autonomous transit vehicles, car, bike and scooter share programs, ride-hailing services, and mobility hubs.

Deliverables: (1) Comprehensive Plan recommendations to establish legislative intent, (2) documentation of the steps needed to develop and adopt a mobility fee program, and (3) draft mobility fee land use schedule(s) and assessment areas. *Staff will assist with the review of land uses and the identification of preferred land uses.*

Task 3: Meetings and Stakeholder Engagement

It is important to ensure that the public and stakeholders are part of the evaluation process towards a new mobility fee program. This task includes the following stakeholder coordination and engagement activities envisioned to address the following topics:

- Development of a mobility plan and the incorporation of existing plans,
- Graphics, renderings of proposed multimodal projects,
- Emerging mobility fee concepts, existing conditions,
- Legality of attractive mobility fee concepts, potential of revenue sources,
- Mobility fee proto-type schedules, and
- Proposed mobility fee proto-type

The consultant shall:

- Lead and facilitate a stakeholder committee process, consisting of four days of meetings, with a diverse stakeholder group representing developers, staff, transportation advocacy groups, elected officials, and other key entities.
- Lead and facilitate up to two days of public meetings/forums.
- Prepare and provide presentations to up to four days of Planning Commission / Board of County Commission meetings.
- Lead and facilitate monthly project team meetings with Walton County staff via Skype or Conference Call.



Deliverable: Public Engagement Plan. A total of ten days holding meetings, workshops and hearings, with an average of three meetings per day, for a total of thirty cumulative meetings, hearings and workshops. *Staff will assist with setting up meeting locations, coordinating meetings and engage the County's communication department in advertising public meetings and hearings.*

Task Four: Develop a County Wide Multimodal Mobility Plan

The plan shall include the following at minimum:

- Summary of existing conditions,
- Identification of goals, vision and policies,
- Establishment of multimodal quality and level of service standards,
- Prioritized project recommendations including multimodal improvements, services and programs,
- Defined project prioritization criteria and schedule, and
- Maps and GIS layers showing recommended multimodal projects.

Deliverable: County Wide Mobility Plan. *Staff will assist with project identification and prioritization.*

Task Five: Develop a County Wide Mobility Fee

The fee shall include the following at minimum:

- Evaluation of existing system wide capacity and travel demand,
- Convert projected future vehicle travel demand to person travel,
- Establish multimodal capacities based on the mobility plan multimodal quality and level of service standards,
- Calculate the increase in multimodal capacity for the mobility plan projects,
- Evaluation of new growth share of mobility projects,
- Determine cost of mobility plan projects,
- Calculate person miles of capacity rate,
- Calculate revenue offset for existing and projected revenue sources or account for funded mobility plan projects to meet current travel demands,



- Calculate person travel demand for each land use in the mobility fee schedule for each assessment area. Person travel demand includes trip generation, percentage of new trips, pass-by trips, person trip conversion, person trip length, and origin and destination adjustment factor. Person travel demand may also account for internal and community capture based upon assessment areas, and
- Prepare draft mobility fee schedule.

The consultant shall solicit feedback from stakeholders, public and the County Commission on the draft mobility fee calculations. The consultant shall finalize the mobility fee calculations and technical report based upon feedback received and direction from the County Commission.

Deliverable: County Wide Mobility Fee Technical Report with mobility fee schedule. *Staff will assist with timely review and comments on the technical report.*

Task Six: Mobility Fee Ordinance

The consultant shall coordinate with the County Attorney on drafting an implementing ordinance for the mobility fee. The ordinance shall at a minimum include findings of fact and address legal and statutory requirements and an effective date. The ordinance shall also include guidance for implementation and administration of the mobility fee or reference the mobility fee administrative manual and procedures manual. *The County Attorney's Office shall provide the ordinance template and address procedural and legal requirements related to the ordinance process and the adoption process.*

Task Seven: Develop Administration Fee Study

The Administration Fee Study and administration fee place a portion of the burden of implementing and administering a mobility fee program on development that creates the need for a mobility fee program, but also ensures that the administration fee does not exceed the County's actual cost of administration and implementation. *Staff will assist with coordination with applicable departments to determine County staff hourly rates, staff involvement and overhead cost associated with County facilities accommodating County staff projected to be involved with administration of the Fee.*



Task Eight: Develop Administrative Procedures and Technical Manual

Technical Manual - This task involved the development of an Administrative or Technical Manual that can be used by applicants desiring to conduct an independent mobility fee study for cases where the applicant and County are unable to reach an agreement for classification of a proposed development to an equivalent land use category in the adopted fee schedule.

Administrative Procedures Manual - This task involves the development of an Administrative Procedures Manual or supplement to the Departments current Policy and Procedures Manual for the administration and financial accounting functions related to the administration of the mobility fee program, including integration with the building permit and development review process.

Staff will assist with coordination with applicable departments to determine County staff involvement related to the collection, expenditure and day to day administration.

Additional Considerations for future initiatives not included in scope

INTERLOCAL AGREEMENTS - The County should consider entering interlocal agreements with any municipality that will address administration, collection, expenditure and implementation of mobility fees within the incorporated limits of the municipality. The Scope does not currently include this task

COMPREHENSIVE PLAN UPDATE - The County should consider update of the Comprehensive Plan upon adoption of a mobility plan and fee. The development of a mobility plan will establish new quality and level of service standards and a list and maps of projects that should be reflected in the Comprehensive Plan. The replacement of transportation concurrency and proportionate fair-share should be reflected in the Comprehensive Plan. Visions, goals and policies from the mobility plan should also be considered for integration into the Comprehensive Plan.

SITE ACCESS ASSESSMENTS - The evaluation of site access has often been included in traffic impact analysis for transportation concurrency. Under a mobility plan and mobility fee, traffic impact analysis for transportation concurrency would no longer be required. However, there is a need to still conduct an analysis of the access connections to new development. The County should consider adoption of site access assessment requirements that address evaluation of access management, cross-access, multimodal access connections, turn lanes,



roundabouts, traffic control devices, the safety and operational impacts to existing access connections and intersections, and an evaluation of internal circulation, parking and queuing for land uses with drop-off areas and drive-thru services.

COMPLETE STREETS DESIGN: The Mobility Plan does not currently include complete streets design standards. There will be elements addressing Complete Streets, but not specific standards. The County may elect to establish standards within the mobility plan or defer to its Land Development Regulations.

CURBSIDE MANAGEMENT PLAN: Curbside control is becoming an element in transportation demand management. These efforts include separate Land Development Regulations and sometimes implementing ordinances and programs. The Mobility Plan will reference mobility hubs, but does not generally include specific design requirements or requirements for development to provide.

PARKING: Parking is increasingly being integrated into mobility plans that address park once environments, shared use facilities, parking management strategies, fee in lieu of parking, parking minimums and parking maximums. The proposed mobility plan does not currently address parking. The plan could be updated to reflect evaluation of parking or a separate task to develop parking strategies in the Land Development Regulations.

VISION ZERO: Mobility Plans have begun to reference vision zero and include recommendations to develop a vision zero plan. There is no restriction on more fully integrating vision zero into mobility plans. Vision zero often includes an evaluation of crashes. There is currently no specific reference to vision zero or evaluation of crashes as part of the proposed mobility plan. The plan could be updated to reflect evaluation of vision zero or crashes or a separate future task to develop a Vision Zero program and evaluate crashes.

MICROMOBILITY PROGRAM: New technology is resulting in a wave of new mobility solutions to address last mile connectivity and park once environments. Dockless bikes, e-bikes and e-scooters are the latest iteration of micromobility. There are others that will be developed. Many local governments are developing separate plans and programs for micromobility. These efforts include separate Land Development Regulations, implementing ordinances and programs. The Comprehensive Plan Recommendations will include



establishing the Cities authority to regulate micromobility and new technology. However, ordinance development, plans and programs are not included in this scope.

GRAPHICS: Increasingly graphics are becoming an important part of public outreach and displaying information. A separate expenditure section will be provided to address development of graphics. There is a real cost and time commitment involved in developing graphics. There is also a significant benefit.

PROJECT TIME LINE: The following is a proposed schedule per task:

Task	Task Description	Start	Complete
1	Evaluate Plan & Project Growth	May 15 th , 2019	September 30 th , 2019
2	Evaluate Alternative Structures	May 15 th , 2019	September 30 th , 2019
3	Meetings & Public Engagement	May 15 th , 2019	December 31 st , 2019
4	Mobility Plan	June 1 st , 2019	March 31 st , 2020
5	Mobility Fee	September 1 st , 2019	July 1 st , 2020
6	Mobility Fee Ordinance	January 1 st , 2020	July 1 st , 2020
7	Administrative Fee Study	January 1 st , 2020	July 1 st , 2020
8	Technical Process & Admin Manual	January 1 st , 2020	September 30 th , 2020

- **FLORIDA STATUTE REQUIRES 90 DAY NOTICE PERIOD FROM THE DATE OF ADOPTION OF A FEE TO THE EFFECTIVE DATE OF THE FEE.**
- **THE TARGET DATE FOR FEE IMPLEMENTATION IS OCTOBER 1st, 2020**
- **TO MEET THAT DATE, THE FEE AND ORDINANCE MUST BE ADOPTED BEFORE JULY 31st, 2020.**



PROJECT HOURS & COST: The following is a breakdown of the projected hours per task and a projected cost based upon an hourly rate of \$175.00:

Task	Task Description	Hours	Cost
1	Evaluate Plan & Project Growth	275	\$48,125
2	Evaluate Alternative Structures	150	\$26,250
3	Meetings & Public Engagement	10 days*	\$24,000
4	Mobility Plan	1,000	\$175,000
5	Mobility Fee	600	\$105,000
6	Mobility Fee Ordinance	100	\$17,500
7	Administrative Fee Study	100	\$17,500
8	Technical Process & Admin Manual	150	\$26,250
Total		2,375	\$439,625

* It is anticipated that an average of three meetings, workshops and /or hearings will be held each day for a cumulative total of 30 meetings, workshops and / or hearings. Debbie and I will be there all ten days and Rob will be there for four of the ten days. Additional meetings beyond ten days will require a scope amendment.

Our Team looks forward to working with Walton County to develop a mobility plan that meets the mobility needs of the community’s residents, business and visitors and a legally defensible and statutorily compliant mobility fee that provides a funding source for the multimodal improvements identified in the mobility plan. If you have any questions or require any additional information, please feel free to reach out to Our Team.

Sincerely,

Jonathan B. Paul

Jonathan B. Paul, AICP
Principal

Cc: Deborah Dantin, P.E.
Robert Schiffer, AICP