

# PLANNING FORUM/TASK FORCE MEETINGS



FISCAL IMPACT & GROWTH SCENARIO  
SELECTION

THURSDAY, AUGUST 19, 2010

FRIDAY, AUGUST 20, 2010

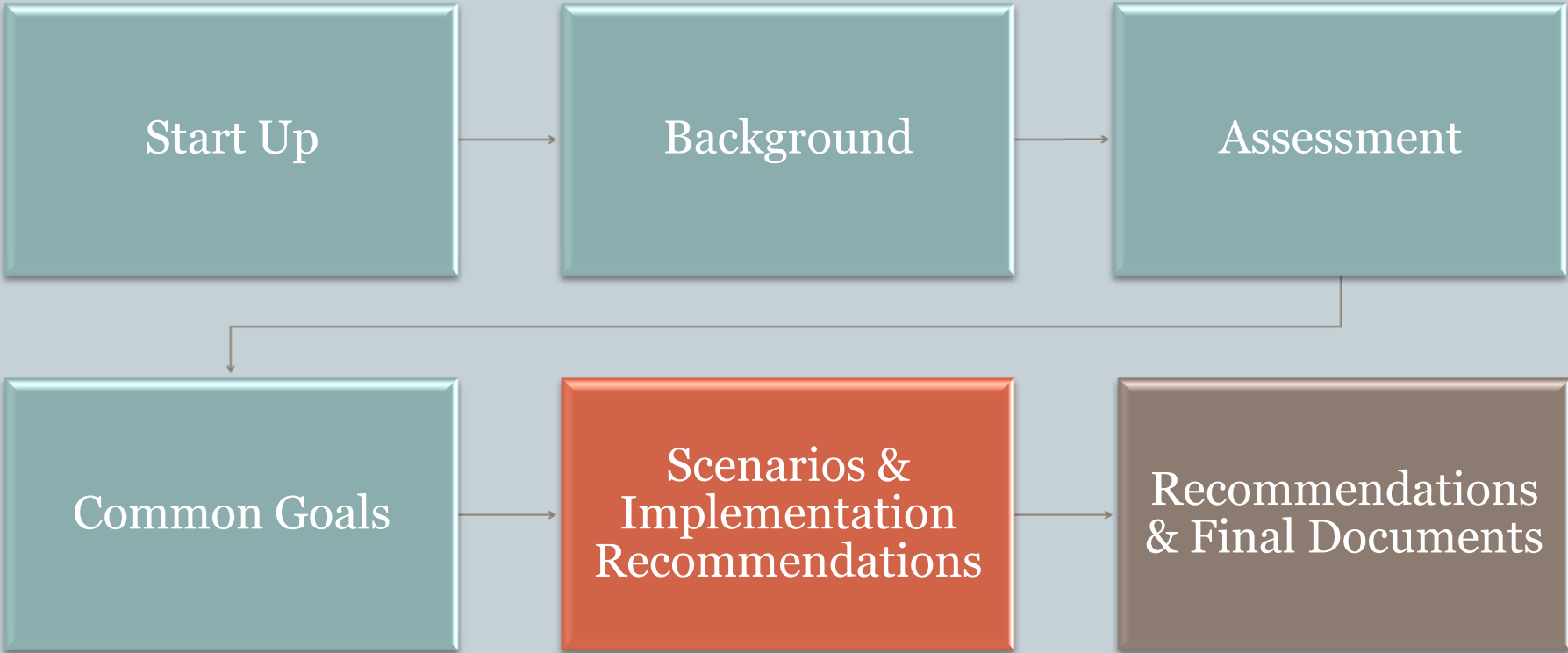
**BCC** 2035  
JOINT STRATEGIC PLAN

# Agenda



- Process Update (Presentation)
- The Scenarios (Presentation)
- Fiscal Results (Presentation/Discussion)
- Scenario Performance (Presentation/Discussion)
- The Fourth Scenario (Presentation/Discussion)
- Next Steps

# The Process



# An Overview



- **The Common Goals**
  - Set benchmarks and express aspirational community values
- **Growth Scenarios**
  - Allocated forecasted growth in 4 different patterns to be tested for impacts on the community (one new since our last meeting)
- **Scenario Evaluation Approach**
  - Tools to test the implications of the growth scenarios
    - ✦ Transportation, utilities, net fiscal impacts (qualitative and quantitative indicators)
  - Scenario Performance Comparison Matrix
    - ✦ Evaluates scenarios' ability to achieve common goals in a comparative matrix format

# Common Goals



## Community Aspirations and Benchmarks

Developed for discussion from issue identification exercises at previous meetings.



# Guiding Principles



- The challenge for the communities is to be prepared to capitalize on the benefits of growth while minimizing negative impacts.
- The communities need to be sustainable. The plan must promote the ability of the economic, fiscal, environmental, and social systems to thrive indefinitely into the future.
- No single jurisdiction can effectively achieve such a sustainable future on its own at the exclusion of other entities. This means that the hallmark of this strategic plan must be cooperation, collaboration, coordination, and communication.
- Within this vision of regional collaboration, the autonomy of each jurisdiction is respected. For this reason, the mechanisms for implementing the Common Goals will involve voluntary cooperative efforts.
- Planning must necessarily involve an ongoing balancing of values and interests. This strategic plan sets out a long range vision and framework for a sustainable future, but the hard work will involve continued cooperative planning and implementation at the local level.

# Common Goals



## 1. Efficient Growth

- Bradley County will grow and develop efficiently relative to the cost and timing of providing infrastructure and public facilities.

## 2. Infrastructure Directed Growth

- Infrastructure and public facilities that meet defined level-of-service standards will be provided concurrent with new growth and development.

# Common Goals



## 3. Economic Competitiveness

- Bradley County will enjoy a growing, diverse, and balanced economy that provides equitable benefits to all segments of the population.

## 4. Fiscal Sustainability

- A strong local economy and a diversified tax base will help position the local government to generate the revenues necessary to finance infrastructure and public facilities in a fiscally responsible manner.

# Common Goals



## 5. Transportation Choices

- A variety of transportation choices will be available to Bradley County residents and businesses, including safe and efficient roads, safe and welcoming bicycle and pedestrian facilities, and public transportation options.

## 6. Housing Choices

- A balanced range of quality housing choices will be available to meet the needs of the full life cycle of ever-changing demographics.

# Common Goals



## 7. Natural & Cultural Resource Protection

- Sensitive natural and cultural resources will be preserved and protected, and viewed as positive assets of the community that contribute to a sustainable future and a high quality of life.

## 8. Livability & Quality of Life

- New growth and development will have a quality and character that promotes community livability, quality of life, and sustainable communities.

# Common Goals



## 9. Value Existing Communities & Neighborhoods

- Existing communities and neighborhoods will be valued, strengthened, supported, and enhanced.

## 10. Intergovernmental Coordination

- Bradley County, the City of Cleveland, and the City of Charleston will work collaboratively and cooperatively to advance the goals of this strategic plan.

# Growth Scenarios



**ALLOCATION OF FORECASTED GROWTH INTO  
FOUR PATTERNS**





# PLANNING AREAS

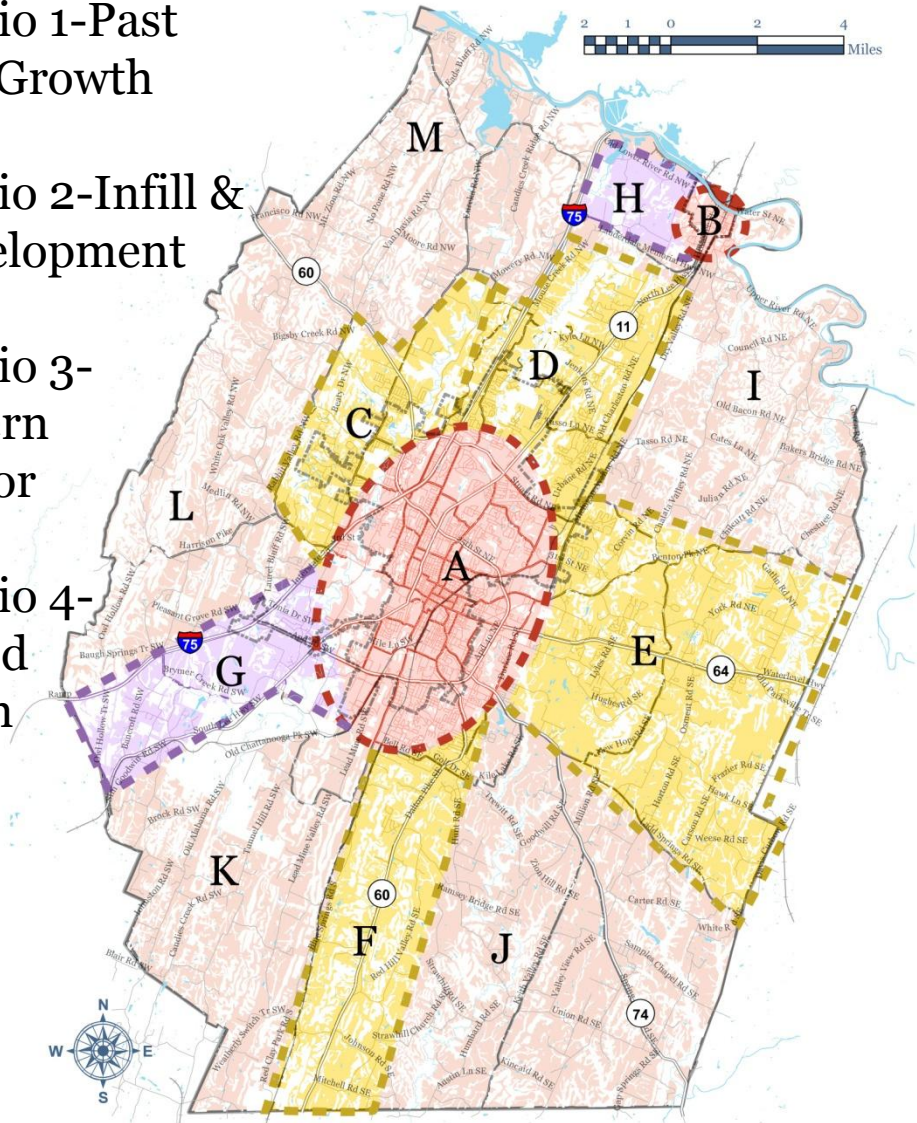
- A-Cleveland Urban Core
- B-Charleston Core
- C-Rabbit Valley/West Cleveland
- D-South Mouse Creek
- E-U.S. 64/74 Corridor East
- F-Blue Springs Valley/Hungry Hollow/Red Clay
- G-I-75/McDonald/S. Lee Highway
- H-Exit 33 East/Old Lower River
- I-Chatata Valley/Locust Hill
- J-Valley View/Buck's Pocket
- K-Pine Hill/Black Fox Valley/Lead Mine Valley
- L-White Oak Valley
- M-Eureka/Candies Creek

## Scenario 1-Past Trend Growth

## Scenario 2-Infill & Redevelopment

## Scenario 3-Southern Corridor

## Scenario 4-Blended Growth



# Scenario 4-Blended Growth



- **Why add the 4<sup>th</sup> Scenario?**
  - Support for Scenario 2 (Infill & Redevelopment) from our Planning Forum, Task Force, and City/County Staff, but see challenges for market support of this scenario.
  - The first three scenarios were designed to show significantly different patterns of growth to test impacts and interest in both mixed use development and infill and redevelopment were identified as important to the communities future vision.
  - With additional research and thinking regarding market realities the new 4<sup>th</sup> scenario is proposed as an alternative that embodies the benefits of Scenarios 2 and 3 by blending the best attributes of the other scenarios.

# Growth Scenario Characteristics

## scenario 1 PAST TREND GROWTH

In the “past trend” scenario growth has been distributed based on the development patterns over the last ten years. This scenario represents what may happen if the policies and regulations for growth in the communities were to remain unchanged. This scenario allocated future growth heavily to areas with a supply of “pipeline” residential lots.

Key assumptions of this scenario include:

- Approximately 30% of the residential growth occurs in urban areas (Cleveland and UGB) and 70% in the unincorporated County.
- Heavy residential growth allocated to the east of Cleveland in the US 64/74 Corridor East (Area E), to the north of Cleveland in the South Mouse Creek Area (Area D), and along Dalton Pike in the Blue Springs/Hungary Hollow/Red Clay Area (Area F).
- Employment allocated in the I-75/McDonald/S. Lee Hwy. (Area G), and in the north near Charleston near Exit 33/Old Lower River (Area H).
- Marginal low density residential allocated in the remaining areas.

## scenario 2 INFILL & REDEVELOPMENT

In the “infill” scenario growth is more heavily allocated to areas within the City of Cleveland Urban Growth Boundary and within the Mouse Creek Watershed to capitalize on available sewer main capacities and other existing infrastructure. The scenario assumes the capacity in these areas can be increased through infill, redevelopment, and intensification.

Key assumptions of this scenario include:

- Approximately 70% of the residential growth allocated in urban areas (Cleveland and UGB) and 30% in the unincorporated County.
- Heavy residential growth allocated in the current limits of the City of Cleveland assuming substantial redevelopment and infill with a higher mix of multi-family and attached residential units with up to 12 units per acre in some areas.
- Likewise, redevelopment is assumed to provide employment growth within these areas as well.
- Employment growth allocated near APD 40/Exit 20 and to the north near Exit 33/Old Lower River.
- Marginal low density residential allocated to the other areas.

## scenario 3 SOUTHERN CORRIDOR

In the “southern corridor” scenario substantial mixed employment and residential growth are allocated to the I-75/McDonald/South Lee Highway Area, which may be drawn by the activity occurring in this area. However, in many ways this is similar to scenario 1.

Key assumptions of this scenario include:

- Approximately 30% of the residential growth allocated in urban areas (Cleveland and UGB) and 70% in the unincorporated County.
- Residential growth allocated in the current limits of the city through redevelopment and infill, additional low density development allocated throughout the unincorporated County with concentrations along Dalton Pike (Area F) and in the Mouse Creek Area (Area D) and in US 64/74 Corridor East (Area E) although not as intensely as in Scenario 1. Area J growth is anticipated near Dalton Pike.
- Again employment allocated in the I-75/McDonald/S. Lee Hwy. (Area G), and in the north part of the County near Charleston in the Exit 33/Old Lower River Area (Area H).
- Marginal low density residential allocated in the remaining areas.

## scenario 4 BLENDED GROWTH

In the “blended growth” scenario the mixed use component of scenario 3 is merged with a lighter infill and redevelopment approach from scenario 2, and integrated with moderate trend/suburban development in areas of the unincorporated County.

Key assumptions of this scenario include:

- Approximately 45% of the residential growth allocated in urban areas (Cleveland and UGB) and 55% in the unincorporated County.
- Residential growth allocated in the current limits of the city through redevelopment and infill, additional low density development allocated throughout the unincorporated County with Mixed Use development allocated in the McDonald/S. Lee Highway Area.
- Employment is allocated to the Exit 33/Old Lower River Area, in redevelopment and infill in the Cleveland Urban Core, near the airport, and in Mixed Use development in the McDonald/S. Lee Highway Area.
- Marginal low density and suburban residential allocated in the remaining areas.
- Blend of the preferred attributes of the other scenarios.

# Growth Scenarios-Population Allocations



Planning Area	2008 Population	Scenario 1 Population Growth (New)	Scenario 2 Population Growth (New)	Scenario 3 Population Growth (New)	Scenario 4 Population Growth (New)
A	39,741	6,636	10,991	7,722	8,721
B	651	221	132	130	132
C	7,638	2,185	5,179	1,441	3,891
D	10,166	4,166	8,427	2,517	3,555
E	12,392	9,281	2,973	4,161	5,806
F	1,379	1,650	730	1,935	1,595
G	3,398	767	495	1,489	1,237
H	570	264	184	152	184
I	2,222	927	730	419	707
J	6,832	1,697	900	4,803	1,667
K	4,627	2,680	818	5,234	3,290
L	3,083	801	723	1,614	1,262
M	3,771	1,558	861	1,104	895
<b>Total</b>	<b>96,470</b>	<b>32,832</b>	<b>33,142</b>	<b>32,722</b>	<b>32,940</b>

# Growth Scenarios-Employment Allocations



Planning Area	2008 Employment	Scenario 4			
		Scenario 1 Employment Growth (New)	Scenario 2 Employment Growth (New)	Scenario 3 Employment Growth (New)	Employment Growth (New)
<b>A</b>	36,641	3,253	12,905	5,568	10,150
<b>B</b>	423	220	42	36	42
<b>C</b>	979	1,430	1,740	2,064	1,740
<b>D</b>	3,844	1,475	840	3,279	1,180
<b>E</b>	1,013	2,590	101	375	378
<b>F</b>	56	125	6	5	6
<b>G</b>	1,295	5,320	1,952	5,084	3,552
<b>H</b>	1,354	2,200	750	2,200	1,200
<b>I</b>	77	130	7	6	7
<b>J</b>	452	227	45	41	45
<b>K</b>	2,091	1,220	538	203	488
<b>L</b>	463	450	46	113	44
<b>M</b>	282	360	28	26	168
<b>Total</b>	<b>48,970</b>	<b>19,000</b>	<b>19,000</b>	<b>19,000</b>	<b>19,000</b>

# Growth Scenario Assessment



**TOOLS TO TEST THE IMPACTS OF THE  
GROWTH SCENARIOS**



# Assessment Tools



- **Transportation Impacts**
- **Utility (Sewer/Water) Impacts**
- **Fiscal Impacts**
  - Includes forecasting demand for all major capital facilities based on current levels of service including
    - ✦ Level one: Schools, fire stations, police/law enforcement facilities
    - ✦ Level two: Health services, parks, libraries
  - Estimates future revenues
  - Estimates a net cost/capita to provide those capital facilities

# Purpose of the Assessment



- Weigh the cumulative impacts of each scenario against the others
- Use results to help evaluate the scenarios' ability to achieve or support the common goals
- Use assessment results and scenario evaluation to create a preferred scenario on which to base the strategies and implementation measures

# Scenario Considerations



- How will the market support the common vision?
- More urban style growth will require more urban services and infrastructure creating upfront costs, but ultimately decreases the overall quantity of infrastructure that must be maintained over time.
- Growth is coming, how do the Cities and County want to address it?
- There are tools and approaches we will be putting together to help implement the preferred scenario that will help answer these questions.

# Fiscal Impact Analysis



- **Primary Revenue Assumptions:**
  - Residential property taxes
  - Commercial and industrial property taxes
  - Local option sales tax
  - Other growth related revenues
- **Primary Operating Cost Assumptions**
  - Public safety – police, fire, ambulance, sheriff, Justice Center
  - City and County Public Schools
- **Primary Capital Cost Assumptions**
  - Debt service for new facilities

# Fiscal Impact Analysis



## The Process

- Conduct departmental interviews
- Review advisory reports and plans
- Analyze annual budgets and capital improvement plans
- Access public education databases for student generation rates and school construction cost assumptions
- Develop assumptions for all key variables

## The Analysis

- Construct fiscal impact model that includes primary funds of the City, County, and the School Systems
- Project operating and capital revenue and expense projections for all primary funds
- Compile net impacts for 2015, 2020, 2030 and 2035.

# General Fiscal Impacts/Key Findings



## Finding the Balance

## Putting into Perspective

Scenario 1	New Students	New Employment
Bradley	85%	100%
Cleveland	15%	20%

Scenario 2	New Students	New Employment
Bradley	67%	100%
Cleveland	33%	68%

Scenario 3	New Students	New Employment
Bradley	82%	100%
Cleveland	18%	30%

Scenario 4	New Students	New Employment
Bradley	79%	100%
Cleveland	21%	60%

2035 Scenario 1	Total New Population
Bradley	32,833
Cleveland	5,749

2035 Scenario 2	Total New Population
Bradley	32,833
Cleveland	12,385

2035 Scenario 3	Total New Population
Bradley	32,833
Cleveland	6,818

2035 Scenario 4	Total New Population
Bradley	32,833
Cleveland	7,963

# Timing is Key



50% of the new students and new employees are expected in the next 10 years

Year	Total New Students	
	Bradley	Cleveland
2015	1,335	230
2020	2,267	390
2030	3,937	678
2035	4,729	814

Year	Total New Students	
	Bradley	Cleveland
2015	994	495
2020	1,688	841
2030	2,933	1,461
2035	3,524	1,755

Year	Total New Students	
	Bradley	Cleveland
2015	1,271	279
2020	2,159	474
2030	3,750	823
2035	4,505	989

Year	Total New Students	
	Bradley	Cleveland
2015	1,214	324
2020	2,062	550
2030	3,582	956
2035	4,303	1,147

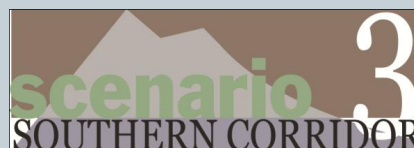
## ALL SCENARIOS

Year	Total New Students	
	Bradley	Cleveland
2015	28%	28%
2020	48%	48%
2030	83%	83%
2035	100%	100%

Year	Total New Employment	
	Bradley	Cleveland
2015	28%	30%
2020	48%	54%
2030	83%	86%
2035	100%	100%

Fiscal planning and policies during 2010-2020 will help set the course for the next 15 years, 2020-2035.

# 10-Year Net Fiscal Impacts



Net Fiscal Impact = New revenues (property taxes, sales taxes, etc.) less operating costs of all major departments and schools less debt service on projected new public safety facilities and schools.

Year	Net Fiscal Impact	
	Bradley	Cleveland
2015	-\$1,634,000	\$234,000
2020	-\$2,772,000	\$488,000

Year	Net Fiscal Impact	
	Bradley	Cleveland
2015	-\$297,000	-\$54,000
2020	-\$507,000	\$73,000

Year	Net Fiscal Impact	
	Bradley	Cleveland
2015	-\$1,387,000	\$202,000
2020	-\$2,416,000	\$455,000

Year	Net Fiscal Impact	
	Bradley	Cleveland
2015	-\$995,000	\$262,000
2020	-\$1,692,000	\$591,000

Year	New School Debt Service	
	Bradley	Cleveland
2015	\$1,872,000	\$397,000
2020	\$3,179,000	\$673,000

Year	New School Debt Service	
	Bradley	Cleveland
2015	\$1,393,000	\$853,000
2020	\$2,366,000	\$1,449,000

Year	New School Debt Service	
	Bradley	Cleveland
2015	\$1,782,000	\$481,000
2020	\$3,027,000	\$817,000

Year	New School Debt Service	
	Bradley	Cleveland
2015	\$1,702,000	\$559,000
2020	\$2,891,000	\$949,000

The County's net impacts do not include existing schools needs or the future fire services transition.

The City's results do not reflect the \$1.8 million loss in revenue from the fire services transition or road debt service commitments.

# Fiscal Impact Summary



- In this model growth (in the current tax structure) is anticipated to cover operational expenses of all primary services; it is the upfront capital for schools that will be the challenge.
- New school construction is the biggest anticipated capital cost. The funding for new schools creates the “gap.”
- It is vitally important that there be a balance of residential and employment growth to generate adequate revenue to provide capital and services to keep up with demand.
- Timing of growth also will play a role in the fiscal realities, after a 10 year period things become more speculative.
- Indicates a need for fiscal and capital planning in the face of growth, how the community reacts now will strongly impact the long-term stability.

# Transportation System Impacts



## scenario 1 PAST TREND GROWTH

- 3.51 Million VMT
- 68 Miles of Congested Roadways
- Least Urban Trips
- Higher Opportunity for Alternative Modes

## scenario 2 INFILL & REDEVELOPMENT

- 3.51 Million VMT
- 107 Miles of Congested Roadways
- Highest Urban Trips
- 2<sup>nd</sup> Highest Opportunity for Alternative Modes

## scenario 3 SOUTHERN CORRIDOR

- 3.24 Million VMT
- 95 Miles of Congested Roadways
- Longer Trips
- Lowest Opportunity for Alternative Modes

## scenario 4 BLENDED GROWTH

- 3.55 Million VMT
- 61 Miles of Congested Roadways
- 2<sup>nd</sup> Highest Urban Trips
- Highest Opportunity for Alternative Mode

# Cleveland Utilities Wastewater System Impacts

## scenario 1 PAST TREND GROWTH

- 17,000 new people in service area
- Wastewater Treatment Plant Capacity -ADEQUATE
  - Projected Daily Flow (New)-2.04 MGD
- Chatata Creek Pump Station
  - Base Capacity 1,050 GPM
  - Max Capacity 1,400 GPM
  - Estimated Total Flow Rate-1,070 GPM
- Candies Creek Pump Station
  - Base Capacity 1,050 GPM
  - Max Capacity 1,680 GPM
  - Estimated Total Flow Rate-1,540 GPM
- Main Capacity
  - Existing mains would need to be upgraded (upsized) in at least 4 locations to handle additional flow

## scenario 2 INFILL & REDEVELOPMENT

- 27,000 new people in service area
- Wastewater Treatment Plant Capacity-ADEQUATE
  - Projected Daily Flow (New)-3.25 MGD
- Chatata Creek Pump Station
  - Base Capacity 1,050 GPM
  - Max Capacity 1,400 GPM
  - Estimated Total Flow Rate-1,240 GPM
- Candies Creek Pump Station
  - Base Capacity 1,050 GPM
  - Max Capacity 1,680 GPM
  - Estimated Total Flow Rate-1,770 GPM
- Main Capacity
  - Existing mains would need to be upgraded (upsized) in at least 7 locations to handle additional flow

## scenario 3 SOUTHERN CORRIDOR

- 19,800 new people in service area
- Wastewater Treatment Plan Capacity-ADEQUATE
  - Projected Daily Flow (New)-2.38 MGD
- Chatata Creek Pump Station
  - Base Capacity 1,050 GPM
  - Max Capacity 1,400 GPM
  - Estimated Total Flow Rate-640 GPM
- Candies Creek Pump Station
  - Base Capacity 1,050 GPM
  - Max Capacity 1,680 GPM
  - Estimated Total Flow Rate-2,400 GPM
- Main Capacity
  - Existing mains would need to be upgraded (upsized) in at least 8 locations to handle additional flow

# Scenario Performance

Following the transportation, fiscal and utility assessments the scenarios were evaluated for their ability to support the common goals.

## Scenario Performance Comparison

Goal (Draft for Discussion)	Scenario 1	Scenario 2	Scenario 3	Scenario 4
<b>Efficient Growth.</b> Bradley County will grow and develop efficiently relative to the cost and timing of providing infrastructure and public facilities.	● 2	● 3	● 2	● 2
<b>Infrastructure Directed Growth.</b> Infrastructure and public facilities that meet defined level-of-service standards will be provided concurrent with new growth and development.	● 2	● 2	● 2	● 2
<b>Economic Competitiveness.</b> Bradley County will enjoy a growing, diverse, and balanced economy that provides equitable benefits to all segments of the population.	● 3	● 3	● 3	● 3
<b>Fiscal Sustainability.</b> A strong local economy and a diversified tax base will help position the local government to generate the revenues necessary to finance infrastructure and public facilities in a fiscally responsible manner.	○ 1	● 3	● 2	● 3
<b>Transportation Choices.</b> A variety of transportation choices will be available to Bradley County residents and businesses, including safe and efficient roads, safe and welcoming bicycle and pedestrian facilities, and public transportation options.	● 2	● 3	● 3	● 3
<b>Housing Choices.</b> A balanced range of quality housing choices will be available to meet the needs of the full life cycle of ever changing demographics.	● 2	● 3	● 3	● 3
<b>Natural &amp; Cultural Resource Protection.</b> Sensitive natural and cultural resources will be preserved and protected, and viewed as positive assets of the community that contribute to a sustainable future and a high quality of life.	○ 1	● 3	● 3	● 3
<b>Livability and Quality of Life.</b> New growth and development will have a quality and character that promotes community livability, quality of life, and sustainable communities.	○ 1	● 2	● 2	● 2
<b>Value Existing Communities and Neighborhoods.</b> Existing communities and neighborhoods will be valued, strengthened, supported, and enhanced.	○ 1	● 3	● 2	● 3
<b>Intergovernmental Coordination.</b> Bradley County, the City of Cleveland, and the City of Charleston will work collaboratively and cooperatively to advance the goals of this strategic plan.	● 3	● 3	● 3	● 3
	18	28	25	27

### Legend

- The scenario does not support the goal ○ 1
- The scenario somewhat supports the goal ● 2
- The scenario strongly supports the goal ● 3

# Implications of the Analysis



- All the scenarios demonstrate that without long range capital improvement and fiscal planning the County will face fiscal gaps under these assumptions.
- All the scenarios will require significant transportation improvements to alleviate congestion and improve mobility.
- The more urban scenarios impact the current wastewater system and infrastructure because more of the growth would occur with utilities. On the other hand less growth would occur with septic systems.
- Growth is coming, how do we address it?
- The reason we are here is to create strategies to achieve a vision that maintains the community's values.
- The chosen scenario should represent what the community wants, the strategies that go with it will represent the path to that vision.

# Next Steps



- Plan Outline
- Draft Strategies and Implementation Actions
- Finalize Preferred Scenario
- Meeting to Review Plan
- City and County Review and Approval