

Questionnaire

Sarasota County engaged AECOM to evaluate its 2050 Fiscal Neutrality requirement and to provide a manual on the methodology to be used by consultants conducting future analyses. As part of the review of the 2050 Fiscal Neutrality Analysis methodology, AECOM is collecting information from fiscal analyst practitioners who have prepared fiscal neutrality analyses submitted with previous rezoning applications. The following questions are focused on the submission process and the methodology used for preparing the analysis. These questions aim to understand the process through the experience of previous studies and to guide interview discussions.

Experience

1. The following questions are regarding the Sarasota 2050 Fiscal Neutrality analyses.
 - a. How many fiscal neutrality analyses have you prepared in Sarasota County under requirements of the 2050 regulations?
 - b. Were all of the above for the same developer?
 - c. Which developers/companies have you worked for?

2. The following questions are regarding other fiscal analyses and experience in other jurisdictions:
 - a. What are other jurisdictions where you have prepared fiscal analyses (generally, or some examples)?
 - b. Have you ever been required to demonstrate fiscal neutrality in another jurisdiction?
 - c. How has the process been the same or different in these jurisdictions?
 - d. Are there any lessons to be learned from other jurisdictions that could improve Sarasota County's process?

Application Process

3. How much lead time did you have to perform your analysis? In other words, how much notice do you have before you need to provide your report?

4. The following questions deal with County-consultant interaction in the process:
 - a. How much clarification have you been asked for by County staff or officials?
 - b. What was the nature of the clarification?
 - c. How much time did this interactive process take—both in terms of your labor and of extending the application/review process?
 - d. What are the steps you feel could be taken in advance to limit this time?

Analysis and Data

5. The following questions pertain to the market study for the development.
 - a. Were market studies prepared before you began the analysis (or simultaneously)?
 - b. What involvement, if any, did you have with the execution of the market analysis?
 - c. Was the market analysis in sufficient detail to provide you with inputs for your analysis?
 - d. What in your opinion could a market study provide that would improve your analysis and/or make the process more efficient?

6. What challenges did you face in completing what would be considered an industry standard fiscal analysis?

7. What disclaimers or caveats have been necessary to include with your fiscal analyses, if any, because of data limitations or other limitations on analysis?

8. The following questions deal with assumptions and developing the basis for analyzing each revenue and expense in the neutrality analysis:
 - a. What aspect of neutrality has been easiest to analyze? Which is the most difficult?
 - b. How easy/difficult is it to develop assumptions for each of the areas below and what assumptions have you used?
 - c. What forms the basis of analysis? (County budget, impact fees, estimates, comparables etc)?
 - d. How did you reconcile the capital impacts of the development with the funds generated by the impact fees?
 - e. How do you define these areas? What is reasonable to assume is attributable to the development? How is this determined for your analysis?
 - i. Transportation facilities
 - ii. Transit
 - iii. Schools
 - iv. Water
 - v. Sewage
 - vi. Solid waste
 - vii. Storm / Surface Water Management
 - viii. Law enforcement
 - ix. Fire and Emergency Management
 - x. Justice
 - xi. General Government
 - xii. Libraries
 - xiii. Parks and Recreation
 - xiv. Public Hospitals
 - f. Were you required to address any extraordinary capital impacts for any of the above listed areas? If so, what and how did you treat those impacts?

9. What indices do you use to escalate costs/revenues, or is this based on county-provided escalation? Are your analyses nominal or real?

10. Are you involved in the estimation of proportional share of transportation facilities or have those data been provided to you?

11. Which method of estimating service costs did you use – average cost, marginal cost, comparables or some other method? Why did you choose this method?

12. How did you treat self-supporting funds such as enterprise funds?

13. Were revenues and costs reflected in constant dollars, or did you adjust for future inflation?

14. Did you have to address the issue of infrastructure costs funded by bond revenue generated by Community Development Districts (CDDs)? What was the source or sources of data to estimate costs to be covered by the CDD?