



# Marion County

## Board of County Commissioners

### Workshop

### Meeting Agenda

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Thursday, March 13, 2025

9:00 AM

McPherson Governmental  
Campus Auditorium

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#### Joint Workshop with City of Ocala

INTRODUCTION OF WORKSHOP BY CHAIRMAN KATHY BRYANT

PLEDGE OF ALLEGIANCE

ROLL CALL

WORKSHOP PRESENTATION

1. [Presentation for Ocala/Marion County Priority Tourism Products](#)
2. [Presentation for Marion County Impact Fees for Emergency Medical Services](#)
3. [Fort King Discussion](#)
4. [Other Topics for Discussion from Board / Council Members](#)

GENERAL DISCUSSION

BOARD DISCUSSION AND CLOSING COMMENTS



# Marion County

## Board of County Commissioners Workshop

### Agenda Item

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**File No.:** 2025-18397

**Agenda Date:** 3/13/2025

**Agenda No.:** 1.

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**SUBJECT:**

**Presentation for Ocala/Marion County Priority Tourism Products**

**INITIATOR:**

**Loretta Shaffer, Director**

**DEPARTMENT:**

**Tourist Development**

**DESCRIPTION/BACKGROUND:**

The Ocala/Marion County Visitors and Convention Bureau has partnered with Hunden Partners to facilitate the development of the Ocala/Marion County Tourism Placemaking Plan and Feasibility Analysis, which was presented during a workshop on November 20, 2024, between the Marion County Board of County Commissioners and the Tourist Development Council. The information is now being presented for review and discussion with the City of Ocala.

**BUDGET/IMPACT:**

None.

**RECOMMENDED ACTION:**

For discussion.



# Ocala/Marion County Priority Tourism Products

2025



## Presentation Agenda

1. Hunden Introduction
2. Goal of the Session - Catalytic Opportunities
3. Project Review
4. Next Steps



# North America's Leading Destination Advisor

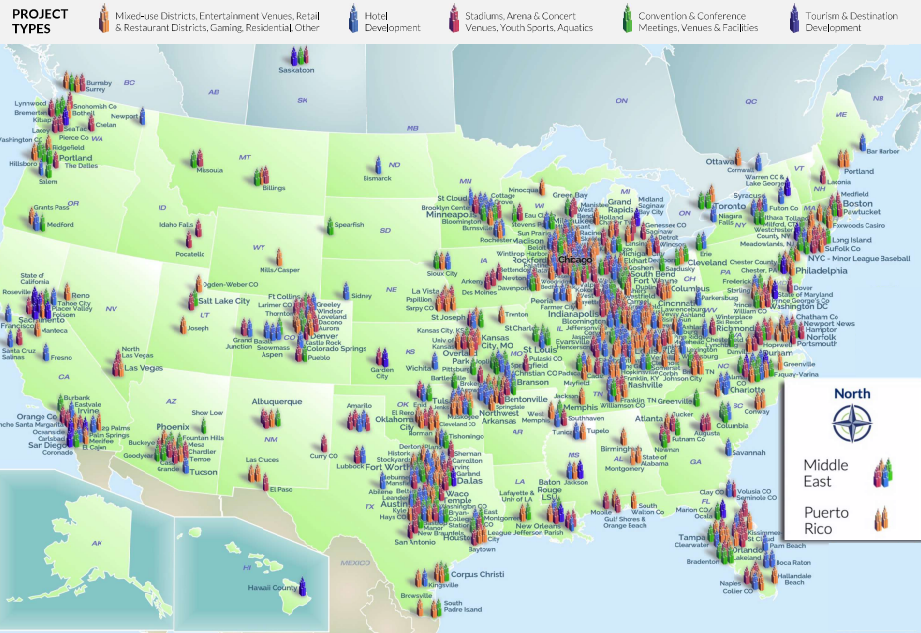
**>1,000** studies and processes | **\$20B** planned or built assets

**650+** conference, convention, event center & hotel studies

**175+** destination & entertainment district studies

**200+** youth sports, stadium & arena studies

**20+** placemaking & destination strategy plans in the last 3 years



hunden partners | [hunden.com](http://hunden.com) | ©2025 Hunden

## Bethanie DeRose

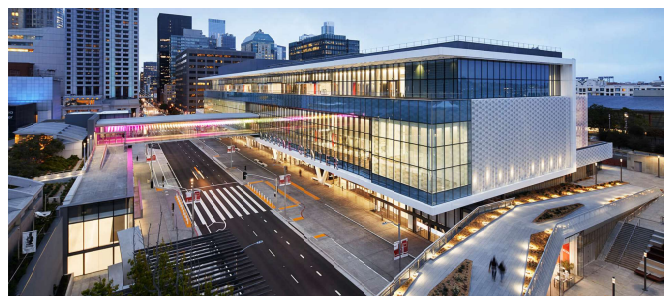
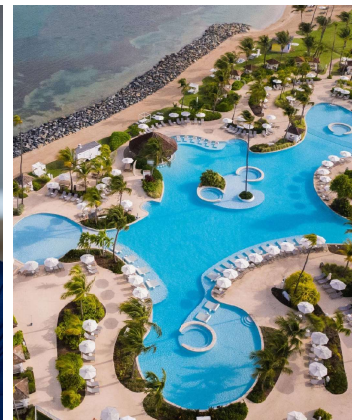
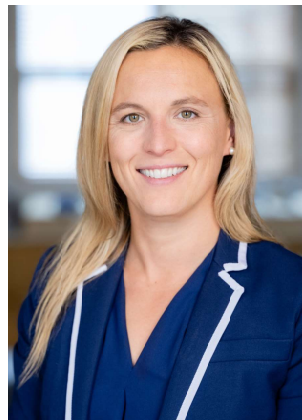
### EVP, Consulting

Destination Planning & Development Consultant

- Tourism destination advisory professional - 11 years
- Former hotel operator - 4 years
- Executive Vice President, JLL - 8 years
- Consultant, Strategic Advisory Group - 3 years

Over 12 Years of Hospitality and Tourism Experience in

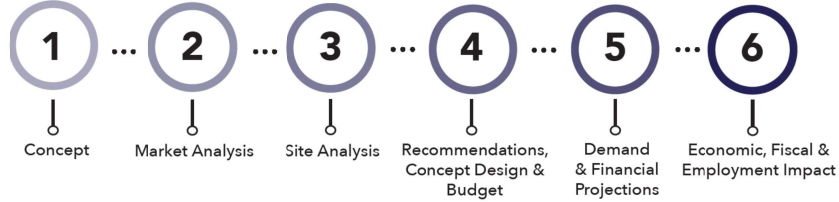
- Tourism Master Planning
- Strategic Planning
- DMO Organizational Planning
- Visioning and Placemaking
- Asset Development Feasibility & Advisory
- Project Management
- Hotel & Convention Center Operations



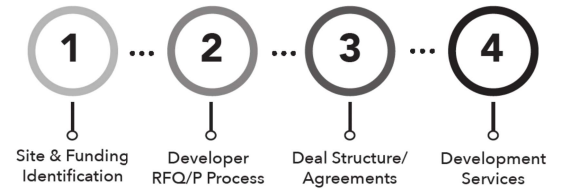
## Placemaking Action Plan



## Feasibility & Impact Study



## Project Advisory & Execution



## Summary Matrix Opportunities

**LEGEND**  
 Feasibility Analysis

What are the opportunities?		Hospitality	Sports & Outdoor Recreation	Shopping, Dining & Entertainment	Conference & Meetings	Major Attractions & Events
	Opportunity		Strong	Strong	Strong	Good
	<b>Priority Level</b>					
1	Absorption of New Developments U/C	<b>Indoor Multi-Use Facility</b>	-	<b>Indoor Multi-Use Facility &amp; Conference Hotel Feasibility</b>	Guided Excursions / Tours & Winter – Early Summer Major Festival/Event	
2	<b>Conference Hotel</b>	Silver Springs Activation, Tours & River Cruise	-	<b>Multi-Use Facility District Build-Out</b>	Transportation / Connectivity Strategy Between Assets (Outdoor Trails)	
3	--	Authentic Commercial Developments near Natural Assets	<b>Multi-Use District Focus &amp; Continue Key Node Development Focus for Downtown Districts</b> <b>Multi-Use Facility District Build-Out</b>	Authentic Commercial Developments near Natural Assets	Water Park or Major Family Entertainment Attraction, Addition Equestrian Related Attractions	

# Recommendations

Hunden’s research of the Ocala/Marion County market, along with the regional and relevant state markets, resulted in the following preliminary recommendations for Ocala/Marion County:

<i>Market-Driven Recommendations</i>		
<u>Priority 1</u>	<u>Priority 2</u>	<u>Priority 3 (Future)</u>
<p><b>Multipurpose Facility</b></p> <p><b>7,000</b> Capacity Flexible Arena / Entertainment Venue</p> <ul style="list-style-type: none"> <li>- 9 Courts</li> <li>- Retractable Seating</li> <li>- Community Asset</li> <li>- Youth Sports Tournaments</li> <li>- Concerts/Graduations</li> </ul>	<p><b>Conference Hotel</b></p> <p><b>300 Key</b> Hotel with <b>16,000 SF ballroom</b> divisible into four (4) and <b>9,600 SF</b> divisible into nine (9) <b>meeting rooms</b></p>	<p><b>Mixed-Use Walkable District:</b></p> <ul style="list-style-type: none"> <li>- Retail/Restaurant</li> <li>- Flexible Entertainment Venue</li> </ul> <p><b>2,000 – 3,000</b> (2,500 ideal) Capacity Indoor Convertible Entertainment Venue</p>

# Recommendations

## Major Takeaways Post 1x1’s With BCC & TDC

Based on Hunden’s analysis, the following opportunities are recommended to conduct a deeper-dive analysis to prove the viability for success for Ocala/Marion County tourism.

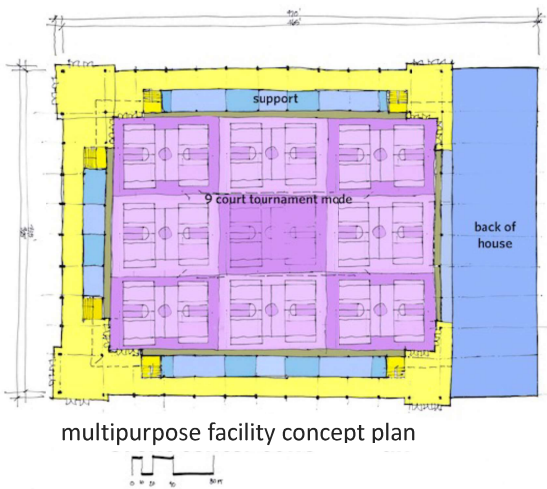
- 1. Multi-Use Facility & Conference Hotel**  
Regional Supply & Competition, Case Studies, Demand for Events
- 2. Large Entertainment Multi-Use District**  
Highest & Best-Use, Indoor Arena for Sports and Concerts, Seating/Gathering Space, Brewery/Winery, Restaurant/Retail
- 3. Water Park or Major Family Entertainment Attraction**  
Commercial & Additional Support Amenities, Induce Long-Distance Visitation

# Site Comparison Matrix

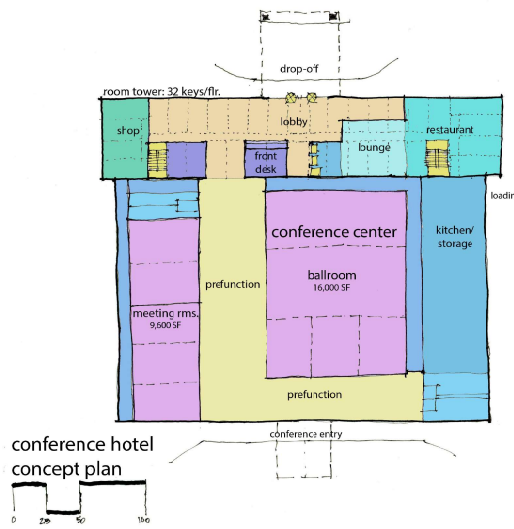
Criterion:	Site:	60th + 200	42nd St Flyover	484 at I-75	326 at I-75	66th St. at I-75	New Interchange	SE 92nd Loop	60th Ave NW at US27	HWY 318 + SR 441	Downtown Ocala South	Downtown Ocala North
Available Undeveloped Acreage		735	189	63-356	40-220	105	430	503-954	75-237	50	19	10
Visibility		3	5	4	4	5	5	1	2	1	4	5
Vehicular access		4	4	3	5	2	4	2	4	3	5	5
Access to transit/trails/walkable		2	3	4	1	1	1	3	1	1	5	5
Utility infrastructure		4	5	4	2	1	1	3	4	3	5	5
Topography		4	4	4	4	5	4	5	4	4	4	4
Usable site/wetlands issues		4	4	3	3	5	4	5	3	4	5	5
Site configuration/shape		4	5	3	2	4	2	4	4	4	1	1
Potential for expansion/additional development		5	5	5	3	3	5	5	3	1	1	1
Developable parcels nearby		5	3	3	4	5	4	4	4	5	2	2
Proximity to residential (inverse)		4	2	2	5	4	4	2	2	4	5	4
Proximity to hotels		4	5	2	3	3	1	1	3	1	5	4
Proximity to dining		3	4	2	2	3	1	2	2	1	5	5
Proximity to shopping		4	5	2	1	3	1	3	2	0	4	4
Proximity to attractions		3	3	2	3	3	2	3	4	2	4	4
Ownership/cost to acquire		3	2	2	2	3	2	5	3	4	2	2
<b>TOTAL</b>		<b>56</b>	<b>59</b>	<b>45</b>	<b>44</b>	<b>50</b>	<b>41</b>	<b>48</b>	<b>45</b>	<b>38</b>	<b>57</b>	<b>56</b>
<b>RANK</b>		<b>3</b>	<b>1</b>	<b>7</b>	<b>9</b>	<b>5</b>	<b>10</b>	<b>6</b>	<b>7</b>	<b>11</b>	<b>2</b>	<b>3</b>

Source: Convergence Design

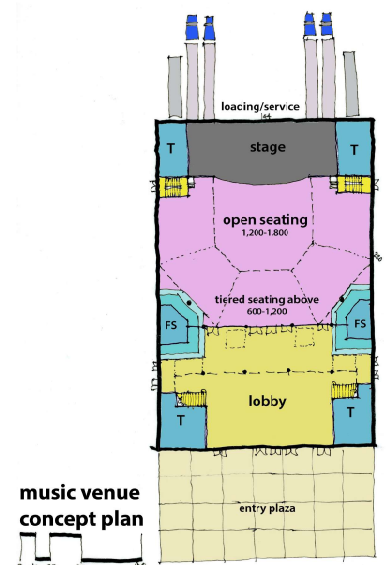
# Venue Inspiration



**Multipurpose Facility**  
(Priority 1)

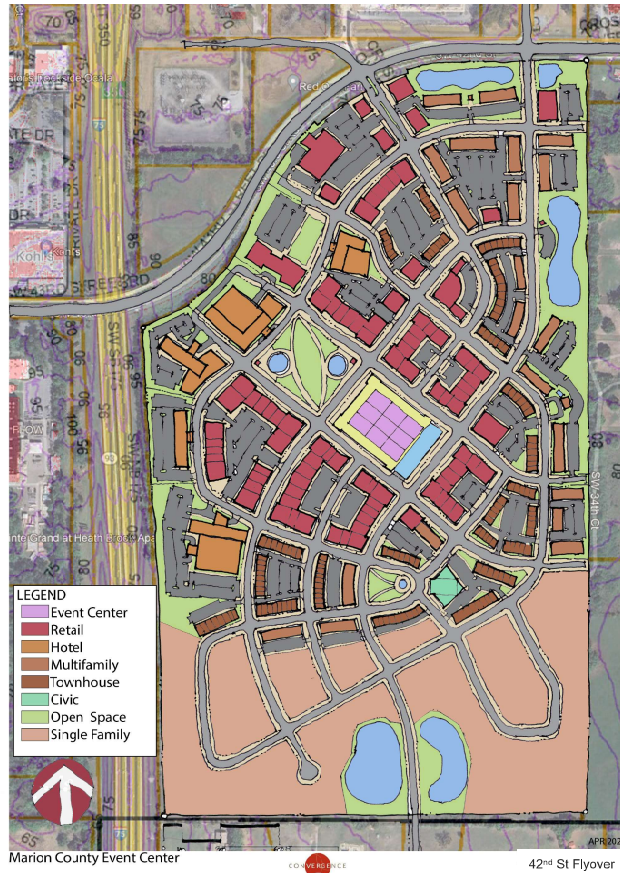


**Conference Hotel**  
(Priority 2)

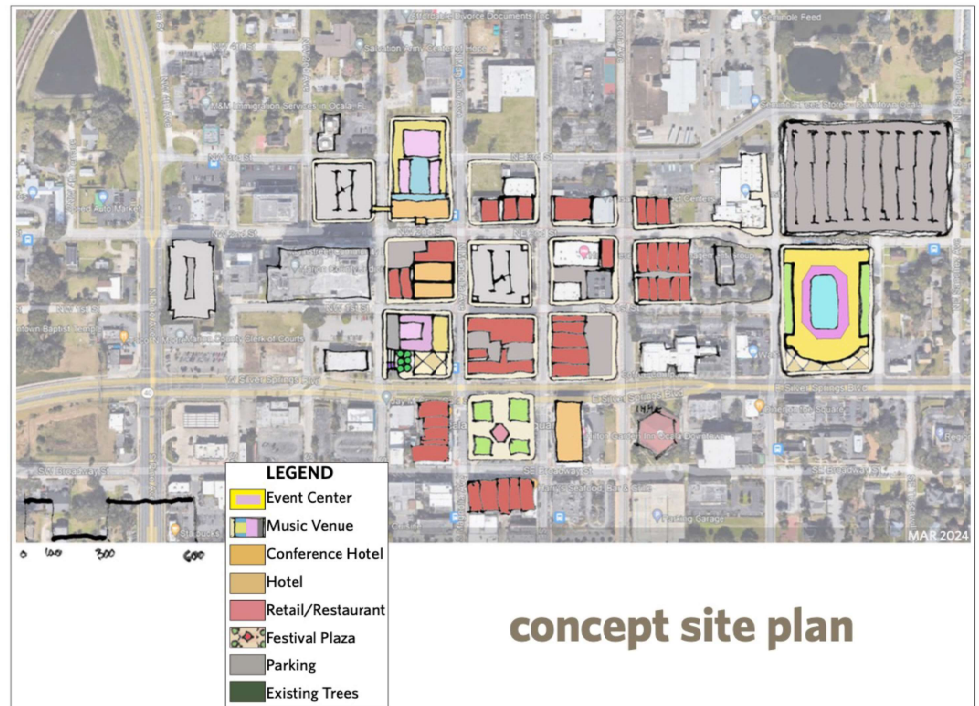


**Flexible Entertainment Venue**  
(Future Phase)

# Future Phase Mixed-Use District Inspiration

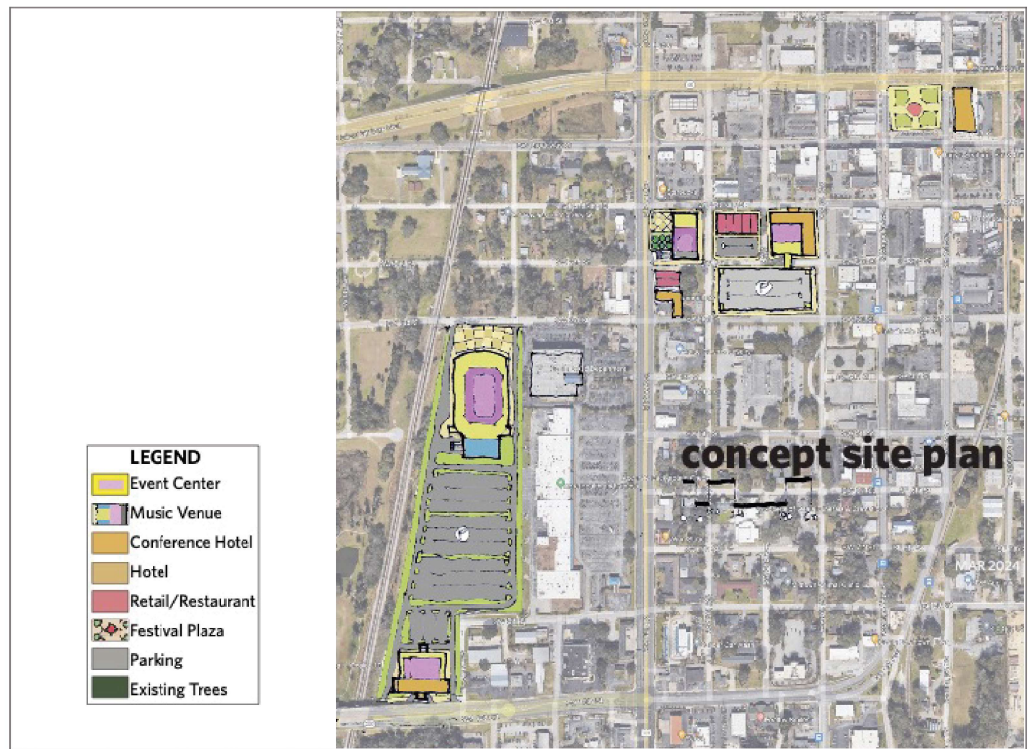


# Future Phase Mixed-Use District Inspiration





# Future Phase Mixed-Use District Inspiration



LEGEND	
	Event Center
	Music Venue
	Conference Hotel
	Hotel
	Retail/Restaurant
	Festival Plaza
	Parking
	Existing Trees

Marion County Tourism Study



Downtown Destination Development | South

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## Additional Opportunities

Opportunities Based on Current Gaps in the Market



### Major Attractions & Events

- Cycling and events centered around existing bike trails
- Quality of life amenities for residents
- Event programming to increase awareness of existing assets within Arts, Culture, History, and Heritage



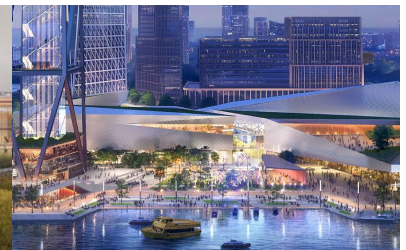
### Connectivity

- Transportation / connectivity strategy between assets
- Connection of existing trails to tourism assets such as Rainbow & Silver Springs
- Commercial airport with nonstop flights to regional destinations



### Sports & Outdoor Recreation

- Authentic commercial developments near natural assets
- Gun/shooting range
- Enhancements in County Parks to increase assets for future growth such as Shocker Park redevelopment
- Additional youth sports facilities for traditional outdoor sports such as soccer, baseball, softball, and football



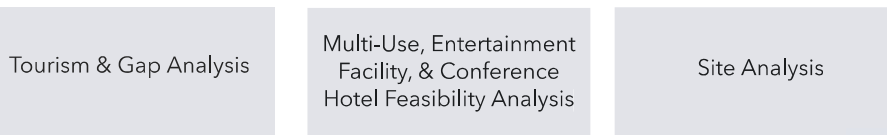
### Shopping, Dining, & Entertainment

- Multi-use district focus & continue key node development focus for downtown districts
- Unique and authentic retail and restaurant offerings
- Family-oriented "eatertainment"

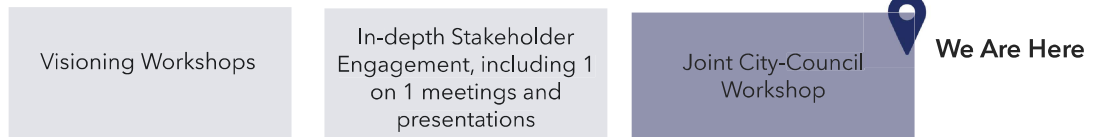
# How Do We Get There?

## Complete Process

### Step 1:



### Step 2:



### Next Steps:



# Priority Tourism Products Market & Financial Business Plan

## Virtual Kickoff & Client Alignment

- Virtual Kickoff
  - Economic, Demographic, and Tourism Analysis Update

## Rationale Market Analyses

- Mixed-Use District Market Analyses
- Waterpark and Hotel/Resort Market Analysis
  - Family "Eatertainment" Analysis
- Case Studies

## Recommendations

- Site Analysis
- Site Layouts, Recommendations and Ranking

## Financial Business Plan

- Business Plan Development: Demand & Financial Projections
- Economic, Fiscal and Employment Impact Analysis
- Funding Mechanisms
- Synthesis of Findings

## Q&A

## Marion County Priority Tourism Products Market & Financial Business Plan

**To:** Marion County Board of County Commissioners  
Attn: Loretta Shaffer, Director, Tourist Development  
109 W Silver Springs Blvd.  
Ocala, FL 34475

**From:** Rob Hunden, CEO, Hunden Partners  
213 W Institute Place, Suite 707  
Chicago, IL 60610  
rob@hunden.com

**Date:** February 25, 2025

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Marion County (County or Client) has requested a comprehensive proposal from Hunden Partners (Hunden) to complete a market and financial feasibility study to consider the market viability and business planning for priority tourism products deemed worthy of further exploration by Hunden's Tourism and Gap Analysis study. The identified uses include:

- Mixed-use district,
- Indoor/outdoor waterpark,
- Family eatertainment anchors, and
- Multi-use conference and event facility and hotel (feasibility study already complete and findings to be integrated with this study).

The purpose of this study is to advance the research and priority recommendations as defined in the 2024 placemaking study. This next deeper-dive phase of work will first result in detailed recommendations for the programmatic elements identified above: mixed-use district, indoor/outdoor waterpark and family eatertainment anchors, based on market findings and case studies. The recommendations will also consider the multi-use conference and event facility and associated hotel as defined in the prior study. Hunden will then provide detailed financial business plans, including demand, financial and impact projections that will allow the Client to make informed decisions for the future implementation of the development concepts. Details will include which site opportunities will yield the highest economic impact and benefit to the area, the optimal programs and mix of uses, site configuration options, financial performance and impact projections for each site scenario, and a comparison of the financial scenarios based on site and project make-up.

Without this financial feasibility phase, the Client will lack the necessary due diligence and financial feasibility elements to successfully attract qualified development partners through a competitive bid process. This financial work is a key component necessary to support the planning and development execution efforts for the district. Hunden's architect partner, Convergence Design, will be engaged to provide insight and layouts related to site selection for any recommended scenarios and conceptual layouts, as appropriate.

## Scope of Work

### Virtual Kickoff and Client Alignment

- Task 1 – Virtual Kickoff
- Task 2 – Economic, Demographic and Tourism Analysis Update (as needed)

### Rationale Market Analyses

- Task 3 – Mixed-Use District Market Analyses
- Task 4 – Indoor/Outdoor Waterpark and Hotel/Resort Market Analysis
- Task 5 – Family Entertainment/"Eatertainment", LBEs and Attractions Analysis
- Task 6 – Case Studies and Incentives Review by Asset Type

### Recommendations

- Task 7 – Site Analysis
- Task 8 – Recommendations, Site Layouts and Ranking

### Financial Business Plan

- Task 9 – Business Plan Development: Demand and Financial Projections
- Task 10 – Economic, Fiscal and Employment Impact Analysis
- Task 11 – Funding Mechanisms
- Task 12 – Synthesis of Findings

## Virtual Kickoff and Client Alignment

### Task 1: Virtual Kickoff

During the study kickoff, Hunden will meet virtually with Client leadership to confirm the goals of the study and other contextual issues related to the Project components. We will perform the following re-orientation tasks in order to align with the Client on goals and objectives:

- Hunden will meet virtually with the Client and obtain any necessary information/data.
- Review previous plans, studies and documents related to the Project.
- Identify and review available sites under consideration.

### Task 2: Economic, Demographic and Tourism Analysis Update (as needed)

As necessary, Hunden will update our evaluation of the area's position as a center of economic activity, related to resident population and growth, business location and growth, accessibility, and as a destination for visitors. This analysis will provide a realistic SWOT assessment for the local and regional area, as appropriate.

Hunden utilizes the latest market data, visitor origin data, demographic data, and other resources to determine a comprehensive view of your marketplace.

## Rationale Market Analyses

### Task 3: Mixed-Use District Market Analyses

Hunden will complete a market analysis for each of the following relevant mixed-use project components, including:

- Restaurant and retail,
- Multifamily,
- Hotel, and
- Office.

Hunden will conduct the following research, as appropriate and relevant for each use:

**Industry Trends.** Hunden will cover the trends that influence how and where people want to shop, eat/drink, stay, and be entertained as part of those experiences, and how recent macro events have shifted these trends.

**Market Performance.** Supply, Demand, Rates, Absorption, and other key metrics of the Ocala/Marion County market, in time-series charts and data tables, using STR, CoStar and other analytical tools. Hunden can include a map of area submarkets and key nodes of asset clusters.

**Submarket Performance.** Supply, Demand, Rates, Absorption, and other key metrics of the Project sites' submarket, in time-series charts and data tables, using STR, CoStar and other analytical tools.

**Competitive Set Identification & Performance.** Profiles of leasable spaces or developments (location, size, quality, age rates, vacancy), absorption and time-series of performance. A competitive set supply map will profile location and consider nearby supportive uses, such as multifamily, hotels, office clusters, sports fields and facilities, entertainment, and other support/demand generators.

**Proposed and Under Construction Projects.** Hunden will profile the relevant projects underway or imminent and consider those as part of the future competitive set absorption dynamic.

**Geofencing Research Technology.** Hunden will study customer origin and traffic analytics for relevant businesses. This information will be used to understand the possible impacts of new retail, dining, residential, hotel and office space in the Ocala/Marion County area and project how the developments will perform.

**Interviews.** Hunden will interview local brokers, hotel and facility management and others in the marketplace to understand the nuances moving the market. Hunden will work to determine what use types could improve the Project and achieve rates that will support development costs. Often, new, unique products can significantly outperform existing stock if there is a gap in quality, age, location, etc. that could induce new demand and higher rates to the submarket.

#### Task 4: Indoor/Outdoor Waterpark and Hotel/Resort Market Analysis

In order to accurately assess the opportunity and marketplace penetration from the waterpark development, Hunden will conduct relevant market assessments on each of the critical components:

- Indoor/Outdoor Waterpark
- Hotel/Resort

The market assessments will include the following work elements:

**Competitive Supply.** Hunden will provide detail on the existing and planned competitive offerings throughout the drivable region and how the Project will add a unique offering or duplicate existing offerings. Hunden will analyze and document the following conditions, as available and appropriate:

- Site and facility layout,
- User and attendee counts, including local vs. out-of-town as available,
- Utilization times,
- Fees and Rental rates,
- Amenities,
- Number of hotel rooms, and
- Unique characteristics.

**Interviews.** To determine whether or not Ocala/Marion County can accommodate a new indoor/outdoor waterpark and/or waterpark resort, Hunden will interview leadership from nationally known waterpark resort companies to understand market criteria and level of interest for development of a new asset in the Marion County area.

## Task 5: Family Entertainment/"Eatertainment", LBEs and Attractions Analysis

**Industry Trends.** Hunden will cover the trends in the development of LBEs (location-based entertainment), Eatertainment attractions and related concepts.

**Market Opportunity.** Hunden will assess the supply and character of existing attractions featuring family fun opportunities, social games, LBEs and food and beverage offerings as appropriate. Relevant family-oriented attractions, LBEs and Eatertainment offerings in the regional area will be reviewed to provide context for the Project.

For smaller, less visitor-inducing assets, Hunden will array in a matrix the assets with various characteristics and determine implications, gaps and opportunities.

For the more impactful, visitor-oriented assets, Hunden will also plot these in a comparative matrix to understand strengths, gaps and opportunities for future development.

Hunden will assess, as appropriate and available:

- General characteristics, such as location, year built, owner/operator, and adjacent/nearby developments/activities,
- Type of attraction (Eatertainment or LBE concept, social game, recreation/family friendly, kids-focused, unique group sports entertainment, etc.),
- Acreage and indoor space/square footage (total, visitor areas, non-visitor areas),
- Content/offerings,
- Pricing,
- Capture market/True Trade Area (TTA),
- Duration of stay (dwell time),
- Number of visits and visitors, avg. annual visits per visitor,
- Visitor characteristics,
- Visitor origin.

**Proposed and Under Construction Projects.** Hunden will profile the relevant projects underway or imminent and consider those as part of the future competitive set absorption dynamic.

**Interviews.** Hunden will interview management from relevant Eatertainment/LBE developments to understand the nuances that influence where and how those assets get developed. Hunden will work to determine what product(s) could thread the needle to improve Marion County's offerings.



This analysis will provide implications for the market supply and demand in the region for Eatertainment concepts.

## Task 6: Case Studies and Incentives Review by Asset Type

Hunden constantly seeks to learn from best practices and the evolution of various types of developments around the U.S. to understand what to include, what to avoid, and 'how' to design and program a successful project. Hunden will focus on those in markets with comparable characteristics to those of the Ocala/Marion County area for each of the Project anchors.

Hunden will consider the following data points as available and relevant:

- Location,
- Size,
- District or development components,
- Visitation, dwell time, visitor origin, demographics, trade area, and other relevant data points from Placer.ai
- Outdoor activation, events and programming,
- Critical factors to success or failure, and
- Others, as appropriate.

**Interviews.** Hunden will interview management and/or ownership of the development and tourism/economic development officials to understand performance, what could be done to improve performance and lessons learned.

These will be profiled, and implications discussed. Hunden will gather and share the wisdom that comes with the depth of the firm's experience and the corresponding best practices with the Client.

## Recommendations

### Task 7: Site Analysis

Based on the high level site assessments conducted in the tourism plan, Hunden will ensure those prioritized sites are still viable. Hunden will also identify any potential new sites for consideration. Additionally, Hunden will establish key criteria for site consideration based on our programming recommendations.

Hunden and Convergence Design will present pros and cons for each of the sites under consideration. The analysis will identify the optimal scenario for each anchor component independently, as appropriate, and the optimal location scenarios for synergy and proximity of the components. Hunden will also consider the multi-use conference center and hotel concept that was assessed in the 2024 study. The site parameters and scenarios will be explored further and in more detail in the following task.

### Task 8: Recommendations, Site Layouts and Ranking

Considering the analysis, Hunden will create a recommendation matrix for each of the Project anchors, including the mixed-use district, indoor/outdoor waterpark, and family eatertainment anchor components,

layering in the multi-use conference center and hotel concept from Hunden's previously completed report. The recommendations will not only be based on the existing market, but also on the market that the Client is looking to attract with the developments.

Based on the recommended program matrix, Convergence Design will create concept visuals that will include detail on program mix, size of each component, layout of each component, and other relevant visual characteristics for each of the anchor uses.

The concept visuals will show how the recommended program will fit on each of the optimal sites. We will also provide recommendations on development phasing for each of the components.

Finally, Hunden will rank the recommendations and site scenarios based on the market findings and site/concept visuals. Hunden will present market findings virtually to the Client.

## Financial Business Plan

Once the market findings presentation is complete, Hunden will prepare a financial business plan for the anchor uses. The business plan will include demand and financial projections, economic and fiscal impact projections to show the return on investment for the agreed upon scenarios, and implications for funding mechanisms and future implementation action steps.

### Task 9: Business Plan Development: Demand and Financial Projections

Hunden will project the market area's demand for each of the Project anchors, including any relevant updates to the previously studied conference center, over the next ten years using the best available data and employing appropriate research from the prior tasks to provide a robust understanding of the demand for the recommended components.

This will then lead to assumptions that will be used to determine the detailed financial projections. These will include major line-item detail of revenue and expense, which will then result in net operating income (NOI) that will support debt service.

In order to determine financial feasibility, the net operating income must be shown against a development cost. Hunden will show the supportable equity and debt that the net cash flows support. From these financial analytics, the feasibility will be determined. If there is a feasibility gap, the modeling from Hunden will determine the amount and what key items led to the gap (costs, absorption, rents, etc.).

### Task 10: Economic, Fiscal and Employment Impact Analysis

Hunden will conduct an economic, fiscal and employment impact analysis to determine the direct, indirect, and induced impacts, including the tax revenues that are generated by the Project anchors, including the previously studied conference center component.

Based on the above analysis, a projection of net new direct spending will be tabulated. New spending is spending that is new to the community due to new residents, visitors to retail/restaurant, new employees in offices and other spending impacts associated with the development. The model will consider net new

recaptured and induced spending only (versus gross spending) to ensure that substitution spending is netted out of the impacts. Spending categories primarily include food/beverage, retail, transportation, lodging and entertainment/other. The net new and recaptured spending is considered to be the **Direct Impact**.

From the direct spending figures, further impact analyses will be completed.

- **Indirect Impacts** are the supply of goods and services resulting from the initial direct spending.
- **Induced Impacts** embody the change in local spending due to the personal expenditures by employees whose incomes are affected by direct and indirect spending.
- **Fiscal Impacts** represent the incremental tax revenue collected by the City and County due to the net new economic activity related to a development. The fiscal impact represents the government's share of total economic benefit. There will be distinct tax impacts for each governmental entity. Fiscal impacts provide an offset to the potential public expenditures required to induce the development of the Project. Hunden will identify the taxes affected and conduct an analysis of the impact on these accounts and governmental units.
- **Employment Impacts** include the incremental employment provided not only onsite, but due to the spending associated with the Project.

Hunden uses one of the industry's most relied upon multiplier models, IMPLAN. This input-output model estimates the indirect and induced impacts, as well as employment impacts, based on the local economy. An input-output model generally describes the commodities and income that normally flow through the various sectors of the economy. The indirect and induced expenditure, payroll and employment result from the estimated changes in the flow of income and goods caused by the projected direct impacts. The model data are available by various jurisdictional levels, including counties.

## Task 11: Funding Mechanisms

Based on similar case studies, best practices and interviews with stakeholders, Hunden will provide the Client with funding strategies to support the implementation of the proposed Project components. Hunden will work simultaneously on operations/maintenance, funding, and size/program size. We will provide examples of formats and structures used by other agencies around the country, as well as inventory examples of funding structures that have been successful to construct and operate similar facilities. These sources and structures may include, as appropriate, public-private partnerships, infrastructure-based development agreements, and operating agreements, as well as note examples of P3 structures that have been successful to construct and operate similar projects.

## Task 12: Synthesis of Findings

Hunden will provide a conclusion summary that synthesizes findings from the study. Hunden will identify the top ranked sites and development scenarios considering findings, site layouts, and the financial and economic impact findings.

## Milestones and Touchpoints

- **Kickoff Organizing Call** – Once the administrative engagement paperwork process is complete, Hunden will schedule an initial kickoff organizing call/Zoom with the Client team for introductions and to schedule any necessary meetings. Hunden will send a kickoff memo outlining requests for data and key contact information, as appropriate and relevant.
- **Check-In Calls** – Throughout the market research tasks, Hunden can schedule check-in calls with the Client to ensure timely forward direction through the study process.
- **Market Findings Presentation**– At the completion of Task 8, Hunden will present a PowerPoint-style deliverable of market findings electronically to the Client. This will include our recommendations and scenarios as appropriate.
- **Draft Analysis** – Hunden will complete all financial and impact modeling elements of the scope of work and compile the results into a draft analysis of its financial outputs, which will be presented to the Client electronically for review and comment.
- **Final Analysis**– After receiving comments from the Client on the draft analysis, Hunden will issue its final analysis.
- **Final Presentation(s)** – Hunden will work with the Client to arrange a final presentation, in person, and conduct additional follow ups needed with up to 14 Client contacts.
- **Visits and Presentations** – Hunden’s scope of work accounts for one in person presentation as well virtual presentation(s), as needed, to the TDC.

## Timing

Hunden proposes the following timing for each distinct deliverable:

- Market Findings Presentation (At the conclusion of Task 8) – approximately three months (twelve weeks) after the following have occurred: contract authorization, receipt of initial kickoff payment, and completion of virtual kickoff meeting
- Draft Analysis (At the conclusion of Task 12) – approximately three months (twelve weeks) after delivery of market findings
- Final Analysis – between two and three months (eight to twelve weeks) after receiving Client comments on the draft. Hunden will work with the Client to finalize the analysis during this time period.

Hunden Partners expects the overall timeline to be approximately 9 months (36 weeks), assuming prompt Client responsiveness. Hunden assumes a kickoff in April 2025 and a final conclusion of the study to be presented in January 2026.

## Compensation

Hunden will complete the scope of work for a fee of **\$199,000**, inclusive of research costs and site test fits for up to three sites by Convergence Design. The fee includes time for one trip to make a presentation in person. Hunden will bill for any requested travel related expenses separately, at-cost without markup.

Hunden proposes to bill the Client an initial kickoff payment of \$18,000 to initiate the study. Hunden will then bill monthly for work completed based on progress. Hunden will provide a description of percent of work complete in each monthly invoice.

## Authorization

The Contractual Conditions and Terms of the original agreement between the Client and Hunden apply to this agreement.

Accepted By:

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Date: \_\_\_\_\_



# Marion County

## Board of County Commissioners Workshop

### Agenda Item

---

**File No.:** 2025-18466

**Agenda Date:** 3/13/2025

**Agenda No.:** 2.

---

**SUBJECT:**

**Presentation for Marion County Impact Fees for Emergency Medical Services**

**INITIATOR:**

**James Banta, Fire Rescue**

**DEPARTMENT:**

**Fire Chief**

**DESCRIPTION/BACKGROUND:**

The findings of the City of Ocala/Marion County Impact Fee Studies for Emergency Medical Services are being presented for discussion.

**BUDGET/IMPACT:**

None.

**RECOMMENDED ACTION:**

For discussion.

# MARION COUNTY FIRE RESCUE

CITY OF OCALA- MARION COUNTY FIRE RESCUE IMPACT FEE STUDY DISCUSSION



## Addressing Growth and Infrastructure Needs

### ■ Marion County Overview

- Population: ~419,000 (18th most populous county in Florida)
- Projected annual growth rate: 0.9% through 2050
- Ranked 17th out of 67 counties in growth rate
- Ranked 15th in residential permitting (2023)

## Addressing Growth and Infrastructure Needs



- **Historical Context of Impact Fees:**
  - Fire rescue impact fee adopted in 2002
  - Suspended in 2010/2011 due to economic downturn
  - Repealed in 2015 (Ordinance 15-14)

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## Addressing Growth and Infrastructure Needs



- **Current Need for Impact Fees:**
  - Continued growth increases demand for fire rescue services
  - County seeks to reinstate fire rescue impact fees
  - Exploring the introduction of an EMS impact fee

4



## Addressing Growth and Infrastructure Needs



### ■ Purpose of the Study:

- Provides technical support for impact fee calculations
- Uses the most recent and localized data available
- Ensures legally and technically defensible fee structure

5

## Impact Fee Methodology Overview



### ■ Consumption-Based Impact Fee Methodology:

- **Definition:** Charges based on the burden each land use places on services (demand).
- **Measurement:** Population per unit for fire rescue and EMS impact fees
- **Proportionate Share:** Ensures fees align with the infrastructure needs generated by new growth.
- **Comparison:**
  - *Consumption-Based:* Addresses new growth without correcting existing deficiencies.
  - *Needs-Based:* Seeks to improve current service levels and correct deficiencies.

6

## Legal Considerations and Revenue Credits

- **Ensuring Fair and Defensible Fees:**
  - **Legal Compliance:** Methodology adheres to Florida statutes.
  - **Revenue Credit:** Subtracts future contributions from non-impact fee revenue sources to prevent double charging.
  - **Exclusions:** Existing population revenues are not included in credits.
  - **Benefit:** Simplifies project cost allocation without estimating existing deficiencies.

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## Next Steps



### Data-Driven Decision Making

Study provides a framework for impact fee implementation



### Agreements with Stakeholders

Agreements between municipalities to collect fees



### Public Hearings

BOCC required to have one public hearing to adopt service area impact fee ordinance.

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# County Wide EMS Revenues and Expenditures



	FY 24 BUDGETED	FY 24 ACTUALS
<b>REVENUES</b>		
Ambulance Fees	\$ 23,868,000	\$ 25,665,926
Special Events	\$ 412,000	\$ 286,218
Supplemental Payment Budgeted	\$ 3,352,392	\$ 5,637,842
Coordinated Opioid Recovery	\$ 181,052	\$ 179,852
Community Paramedic Program	\$ 55,523	\$ 165,685
Medical/Nonmedical Transport Fee	\$ -	\$ 2,000
<b>EXPENDITURES</b>		
Lease Agreement	\$ -	\$ 875
PERSONNEL SERVICES	\$ 33,304,470	\$ 32,618,310
OPERATING	\$ 5,876,492	\$ 4,886,503
CAPITAL	\$ 264,254	\$ 229,514
DEBT SERVICE	\$ -	\$ 50,184
Aid to AHCA	\$ -	\$ 2,384,996
Fund Balance	<b>\$ (11,576,249)</b>	<b>\$ (8,231,109)</b>

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# Impact Fees



ITE LUC	Land Use	Impact Unit	Fire Rescue		EMS		Fire Rescue and EMS Calculated Impact Fee <sup>(5)</sup>
			Functional Residents per Unit <sup>(1)</sup>	Calculated Impact Fee <sup>(2)</sup>	Functional Residents per Unit <sup>(3)</sup>	Calculated Impact Fee <sup>(4)</sup>	
<b>RESIDENTIAL:</b>							
210	Single Family	du	1.39	\$663	1.41	\$208	\$871
	- 1,500 sf or less	du	1.58	\$753	1.61	\$238	\$991
	- 1,501 to 2,499 sf	du	1.74	\$829	1.77	\$261	\$1,090
220/221/222	Multi-Family	du	1.06	\$505	1.17	\$173	\$678
240	Mobile Home	du	1.35	\$643	1.34	\$198	\$841
251	Senior Adult Housing - Detached	du	0.95	\$453	0.97	\$143	\$596
252	Senior Adult Housing - Attached	du	0.63	\$300	0.70	\$103	\$403

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# Impact Fees



### EMS Impact Fee Revenue Projections -- Countywide

Service Area	Residential Revenue %	Non-Residential Revenue %	Revenue Adjustment	Rate Adoption	Annual (Low-End)	Annual (High-End)	5-Yr Estimate (Low-End)	5-Yr Estimate (High-End)
EMS_1	85%	15%	90%	100%	\$1,187,000	\$1,462,000	\$5,935,000	\$7,310,000
EMS_2	85%	15%	90%	90%	\$1,068,000	\$1,315,000	\$5,340,000	\$6,575,000
EMS_3	85%	15%	90%	80%	\$948,000	\$1,167,000	\$4,740,000	\$5,835,000
EMS_4	85%	15%	90%	50%	\$594,000	\$731,000	\$2,970,000	\$3,655,000

### EMS Impact Fee Revenue Projections -- Ocala Only

Service Area	Residential Revenue %	Non-Residential Revenue %	Revenue Adjustment	Rate Adoption	Annual (Low-End)	Annual (High-End)	5-Yr Estimate (Low-End)	5-Yr Estimate (High-End)
EMS_1	85%	15%	90%	100%	\$120,000	\$166,000	\$600,000	\$830,000
EMS_2	85%	15%	90%	90%	\$108,000	\$150,000	\$540,000	\$750,000
EMS_3	85%	15%	90%	80%	\$96,000	\$133,000	\$480,000	\$665,000
EMS_4	85%	15%	90%	50%	\$60,000	\$83,000	\$300,000	\$415,000

### EMS Impact Fee Revenue Projections -- Excluding Ocala

Service Area	Residential Revenue %	Non-Residential Revenue %	Revenue Adjustment	Rate Adoption	Annual (Low-End)	Annual (High-End)	5-Yr Estimate (Low-End)	5-Yr Estimate (High-End)
EMS_1	85%	15%	90%	100%	\$1,067,000	\$1,296,000	\$5,335,000	\$6,480,000
EMS_2	85%	15%	90%	90%	\$960,000	\$1,165,000	\$4,800,000	\$5,825,000
EMS_3	85%	15%	90%	80%	\$852,000	\$1,034,000	\$4,260,000	\$5,170,000
EMS_4	85%	15%	90%	50%	\$534,000	\$648,000	\$2,670,000	\$3,240,000

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# Added Capacity Fire Stations



### Fire Rescue 5 Year Growth Plan

Category	Impact Fee	Resource Type	Resource Location
Capacity	\$ 300,000.00	Land Acquisition	Pedro
Capacity	\$ 8,350,000.00	New Station	Pedro
Capacity	\$ 300,000.00	Land Acquisition	Westport
Capacity	\$ 300,000.00	Land Acquisition	Rainbow Lakes
Capacity	<b>\$ 8,350,000.00</b>	<b>New Station</b>	<b>Westport</b>
Capacity	\$ 8,350,000.00	New Station	Rainbow Lakes
Capacity	<b>\$ 6,900,000.00</b>	<b>New Station</b>	<b>EMS West</b>
Capacity	<b>\$ 8,350,000.00</b>	<b>New Station</b>	<b>Baldwin Ranch</b>
Capacity	\$ 300,000.00	Land Acquisition	Ocklawaha
Capacity	\$ 8,350,000.00	New Station	Ocklawaha
Capacity	\$ 300,000.00	Land Acquisition	Blifhton
Capacity	\$ 8,350,000.00	New Station	Blifhton
Capacity	\$ 300,000.00	Land Acquisition	Flemmington
Capacity	\$ 8,350,000.00	New Station	Flemmington
Capacity	\$ 300,000.00	Land Acquisition	Spruce Creek
Capacity	\$ 8,350,000.00	New Station	Spruce Creek
Capacity	\$ 300,000.00	Land Acquisition	Rolling Hills
Capacity	\$ 8,350,000.00	New Station	Rolling Hills
<b>Subtotal</b>	<b>\$ 84,450,000.00</b>		

### Projected Cost vs Revenue

	High-End	Low-End	
Projected Revenue	\$ 82,665,000.00	\$ 67,830,000.00	
Projected Cost	\$ 84,450,000.00	\$ 84,450,000.00	
Difference	\$ (1,785,000.00)	\$ (16,620,000.00)	New Station cost includes equipment

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## Added Capacity Unit Costs



HP Ambulance (As Equipped)		
Vehicle	Cost	Expected Life Cycle
Truck With PowerLoad System	\$ 358,000	6 years
Equipment	Total Cost	Expected Life Cycle
Truck Radio	\$ 9,000	10 years
Portable Radio (2)	\$ 20,000	10 years
Onboard Mobile Gateway	\$ 3,800	10 years
Ruggedized Tablet MDT mount included docking station and pole	\$ 7,000	5 years
Cardiac Monitor	\$ 50,000	10 years
Chest Compression System	\$ 15,000	8 years
Stair Chair	\$ 4,000	10 years
Autovent	\$ 20,000	10 years
Miscellaneous Medical Equipment and Supplies	\$ 15,000	
Stretcher	\$ 32,000	10 years
<b>Subtotal Equipment</b>	<b>\$ 175,800</b>	
<b>Total</b>	<b>\$ 533,800</b>	2/17/2025

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## Added Capacity Unit Staffing Costs



Single-Certified Ambulance Costs						
	Multipliers	PM	EMT	Relief Factor (1.25)	Total Per Shift	Total Per Unit
Base Hourly Rate		\$18.74	\$15.00		N/A	N/A
Stipend					N/A	N/A
Total Hourly Rate		\$18.74	\$15.00		N/A	N/A
Regular Salary/Wages	2080	\$38,979.20	\$31,200.00	\$17,544.80	\$87,724.00	\$307,034.00
Built-in Overtime	557	\$15,657.27	\$12,532.50	\$7,047.44	\$35,237.21	\$123,330.24
Additional Overtime	50	\$1,405.50	\$1,125.00	\$632.63	\$3,163.13	\$11,070.94
Subtotal		\$56,041.97	\$44,857.50	\$25,224.87	\$126,124.34	\$441,435.18
FICA Taxes	0.062	\$3,474.60	\$2,781.17	\$1,563.94	\$7,819.71	\$27,368.98
Medicare	0.0145	\$812.61	\$650.43	\$365.76	\$1,828.80	\$6,400.81
Retirement Contributions	0.3443	\$19,295.25	\$15,444.44	\$8,684.92	\$43,424.61	\$151,986.13
Worker's Compensation	0.0389	\$2,180.03	\$1,744.96	\$981.25	\$4,906.24	\$17,171.83
Health Insurance	\$13,584.00	\$13,584.00	\$13,584.00	\$6,792.00	\$33,960.00	\$118,860.00
Life, AD&D, LTD	0.006741	\$377.78	\$302.38	\$170.04	\$850.20	\$2,975.71
<b>Total</b>		<b>\$95,766.24</b>	<b>\$79,364.88</b>	<b>\$43,782.78</b>	<b>\$218,913.90</b>	<b>\$766,198.65</b>

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## SERVICE DELIVERY ANALYSIS

CITY OF OCALA- EMS ONLY



Empowering Marion for Success

15

## Common Definitions Used By Fire Rescue

- Workload- Workload is the first factor for consideration. The measure of how much work an individual unit incurs could be as simple as a sum of incidents within a given period of time, such as a year.
  - However, incident duration can vary significantly from minutes to hours and thus this method does not provide the best measure of workload.
  - A more accurate method—while still not a perfect measure—is to consider the amount of time to which a unit is assigned and compare that to the amount of time the unit is in service, a measure referred to as unit hour utilization. " Time on Task"
  - The imperfection of this measure is that it does not capture other on-duty activities such as training, station maintenance, apparatus maintenance, hydrant testing, hose testing, pre-incident planning, public education events, etc.

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## Common Definitions Used By Fire Rescue



- Resource Reliability/Concurrency- refers to the number of incidents occurring simultaneously within the service area.
  - As the number of simultaneous incidents increases, the ability to respond to additional calls for service decreases.
  - Displayed in percentage of occurrence.

Level of Concern for Reliability	Percentage
Low	0-10%
Moderate	11-20%
High	21-30% or More

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## Common Standards Governing Fire Rescue



- NFPA 1061: Standard for Public Safety Telecommunications Personnel Professional Standards Qualifications
- NFPA 1201: Standard for Providing Fire and Emergency Services to the Public
- NFPA 1225, Standard for Emergency Services Communications
- NFPA 1660: Standard for Emergency, Continuity, and Crisis Management: Preparedness, Response, and Recovery
- NFPA 1620: Standard for Pre-Incident Planning
- NFPA 1710, Standard for the Organization and Deployment of Fire Suppression Operations, Emergency Medical Operations, and Special Operations to the Public by Career Fire Departments.
- NFPA 1720, Standard for the Organization and Deployment of Fire Suppression Operations, Emergency Medical Operations, and Special Operations to the Public by Volunteer Fire Departments.

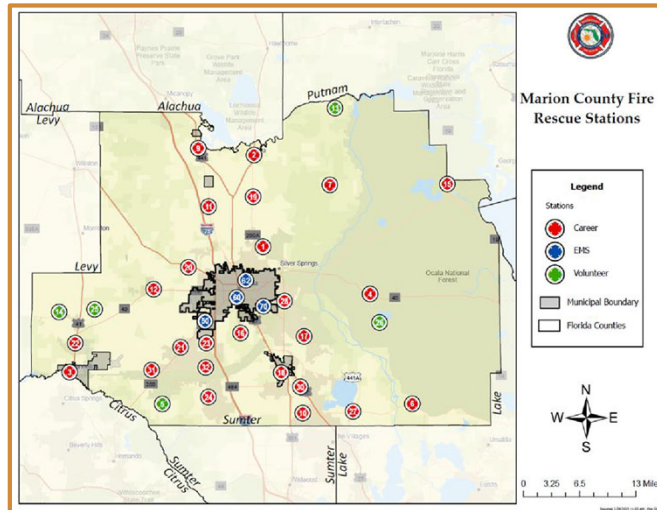
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# MARION COUNTY FIRE RESCUE

MCFR STAFFS 25 CAREER FIRE STATIONS AND 3 EMS STATIONS EVERY DAY.

811 DEDICATED STAFF

115 HP WITHIN THE CITY.

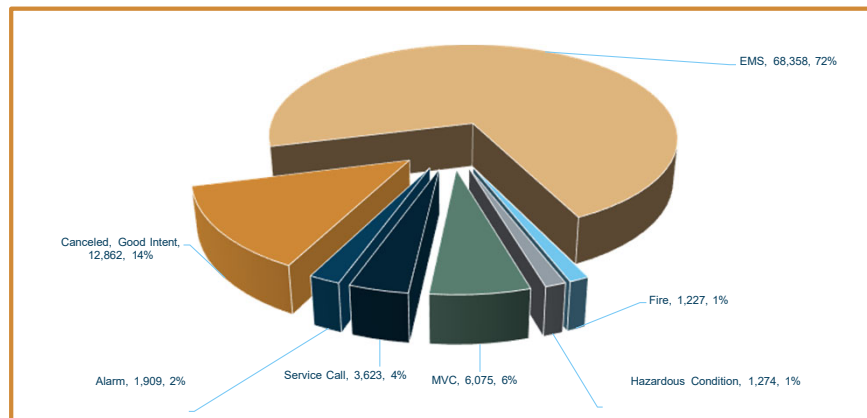


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## Marion County Fire Rescue FY 23/24 Service Demand



Annual		
	FY 23/24	FY 23/24
Total	95,445	100%
Alarm	1,909	2%
Canceled, Good Intent	12,862	14%
EMS	68,358	72%
Fire	1,227	1%
Hazardous Condition	1,274	1%
MVC	6,075	6%
Other	117	.001%
Service Call	3,623	4%



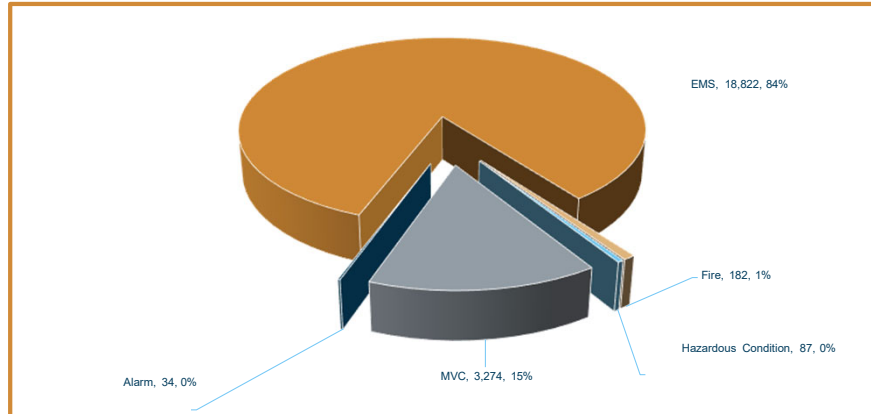
20



# City of Ocala FY 23/24 Service Demand



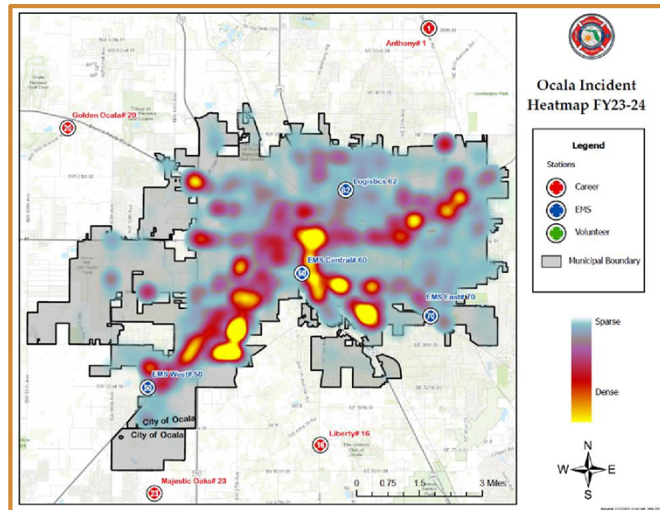
Annual		
	FY 23/24	FY 23/24
Total	22,434	100.00%
Alarm	34	0.15%
EMS	18,822	83.90%
Fire	182	0.81%
Hazardous Condition	87	0.39%
MVC	3,274	14.59%
Other	3	0.01%
Service Call	32	0.14%



21

## SERVICE DEMAND

HEAT MAP OF CALLS FOR SERVICE.

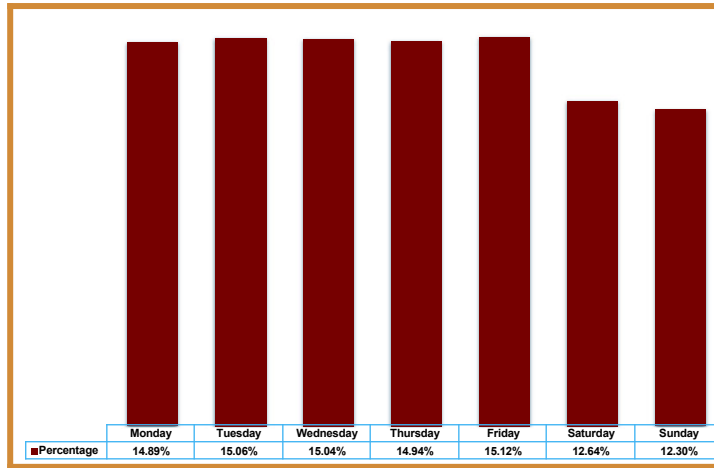


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# TEMPORAL DEMAND

## DEMAND BY DAY

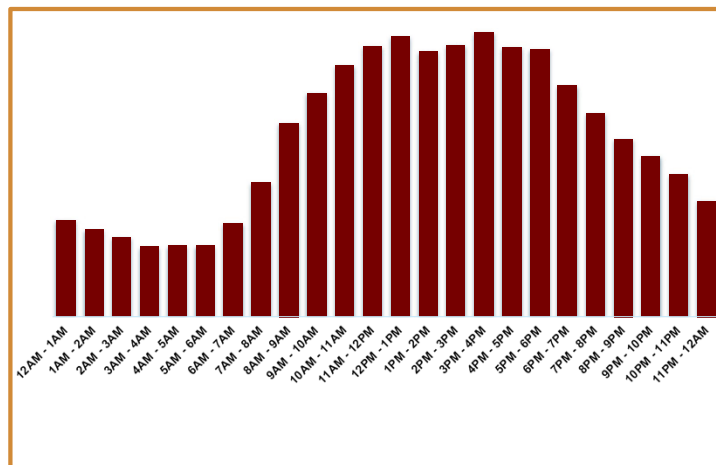
	Count	Percentage
Monday	3,343	14.89%
Tuesday	3,380	15.06%
Wednesday	3,377	15.04%
Thursday	3,354	14.94%
Friday	3,395	15.12%
Saturday	2,838	12.64%
Sunday	2,761	12.30%
Total	22,448	100.00%



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# TEMPORAL DEMAND

## DEMAND BY TIME OF DAY



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## SERVICE CALLS PER UNIT

### CITY UNITS

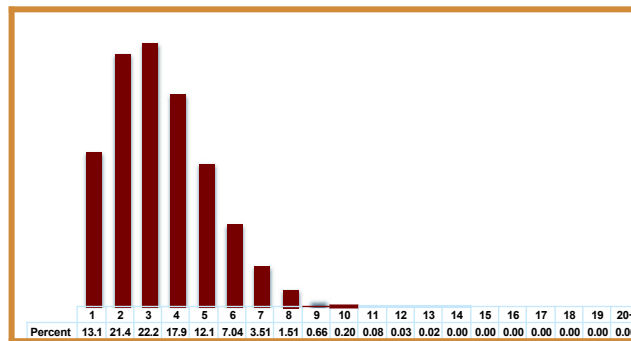
28 OTHER FIRE BASED RESCUES ANSWERED 2,793 CALLS FOR SERVICE WITHIN THE CITY LIMITS.

Unit	Total Calls
CC1	1087
M50	2102
M51	2535
M60	2347
M61	2486
M62	2532
M63	2408
M64	2459
M65	2463
M70	1912
M71	1985
M80	1427
M81	151
M90 - PRN	783
M91 - PRN	173

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## SERVICE DEMAND CONCURRENCY

### CITY OF OCALA

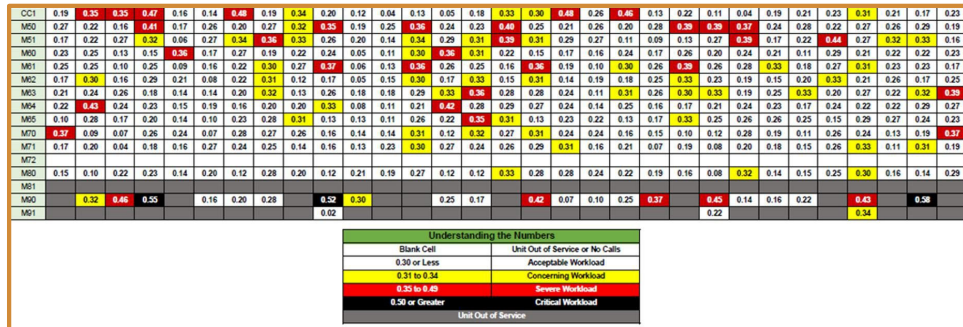


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# WORKLOAD

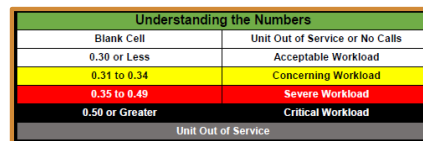
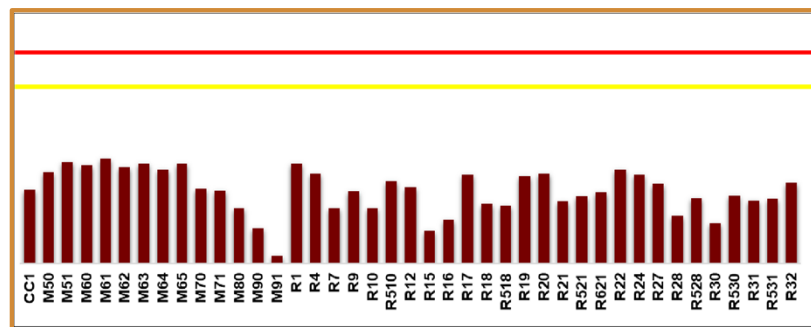
## UNIT HOUR UTILIZATION



29

# WORKLOAD

## UNIT HOUR UTILIZATION



30

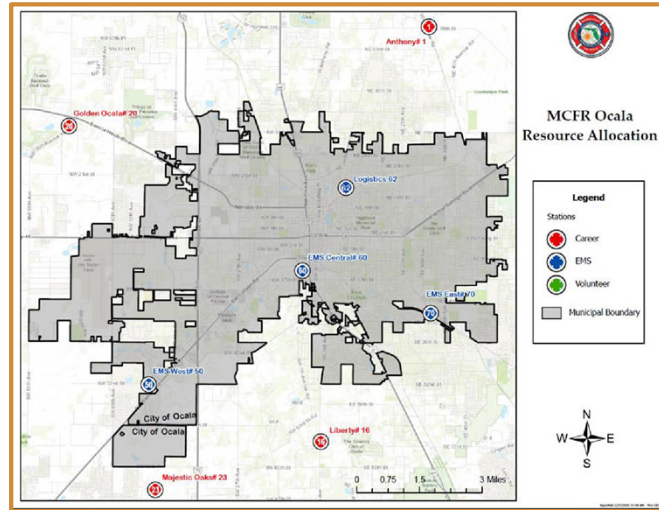
# RESOURCE ALLOCATION

MCFR OPERATES 3 EMS STATIONS.

EMS WEST

EMS EAST

EMS CENTRAL/ LOGISTICS 62



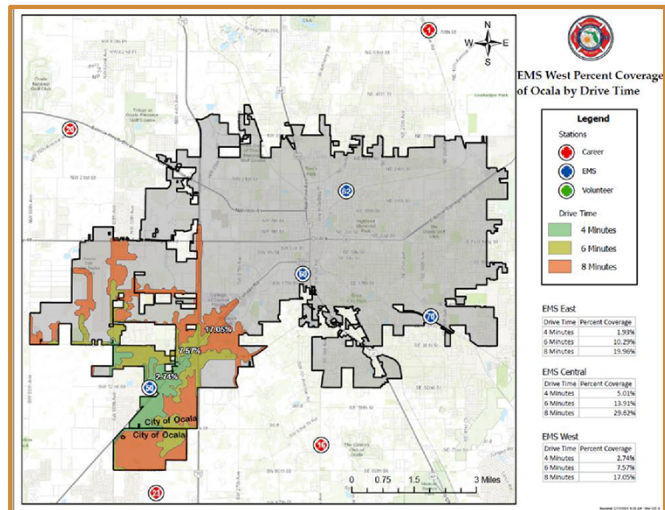
31

# EMS WEST

THE FOLLOWING RESOURCES ARE LOCATED IN EMS WEST (OFD6):

MEDIC 50

MEDIC 51

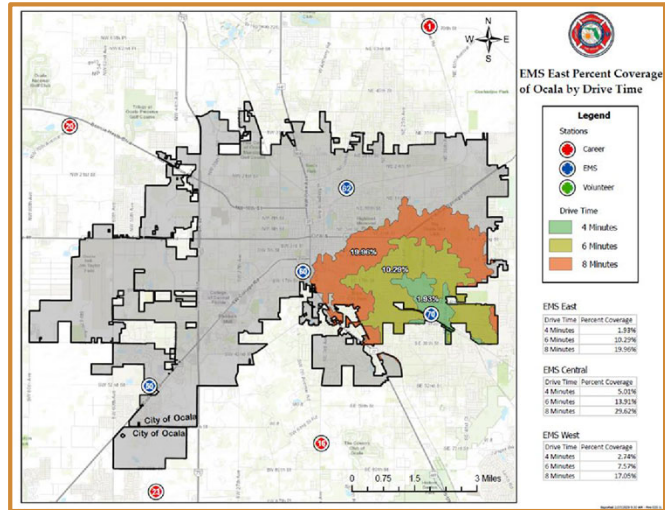


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## EMS EAST

THE FOLLOWING RESOURCES ARE LOCATED IN EMS EAST:

- MEDIC 70
- MEDIC 71
- MEDIC 80
- MEDIC 90- PRN PEAK
- MEDIC 91- PRN PEAK

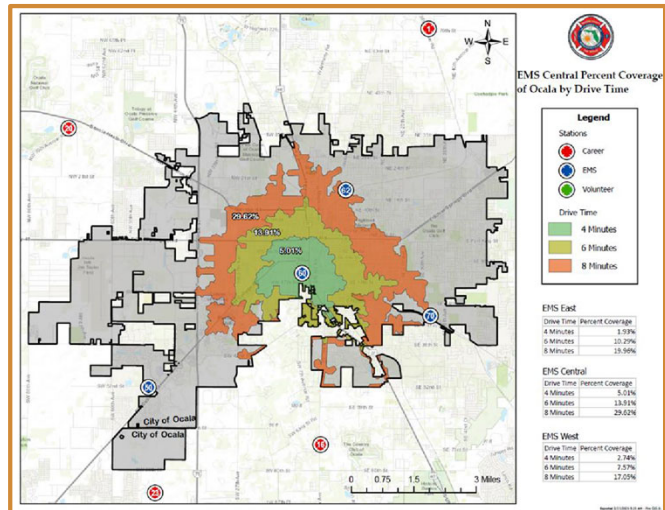


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## EMS CENTRAL

THE FOLLOWING RESOURCES ARE LOCATED IN EMS CENTRAL:

- MEDIC 60    MEDIC 61
- MEDIC 62    MEDIC 63
- MEDIC 64    MEDIC 65
- CC1
- ALS1
- BC6

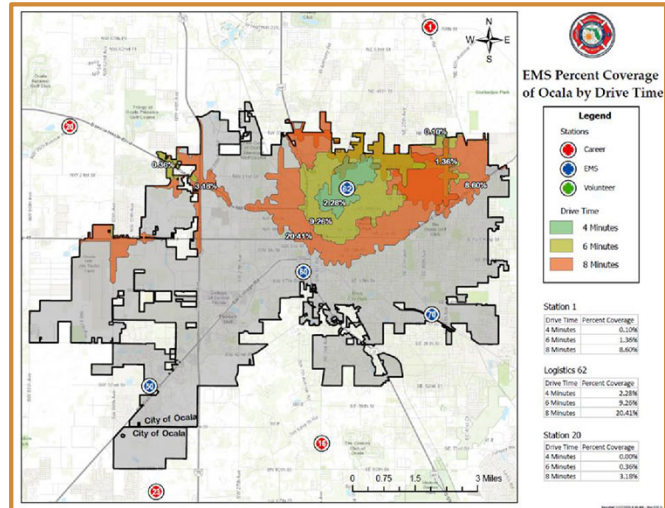


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# EMS CENTRAL LOGISTICS

THE FOLLOWING RESOURCES ARE LOCATED IN EMS CENTRAL:

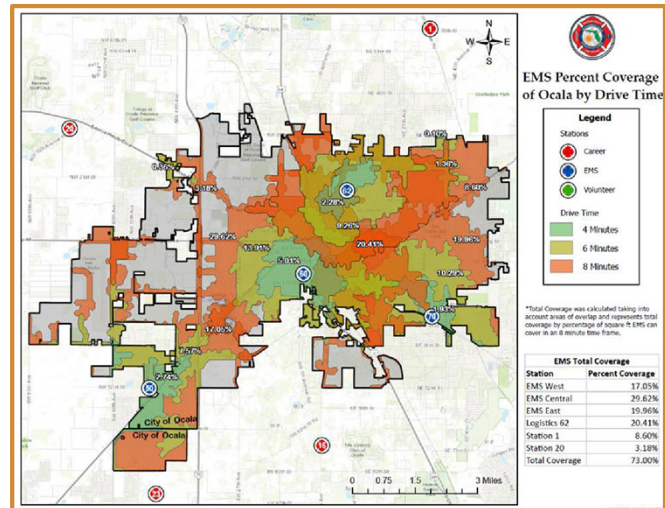
MEDIC 62



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# NFPA 1710 DRIVE TIME

DRIVE TIME COVERAGE BY PERCENTAGE.



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**QUESTIONS?**





# Marion County Fire Rescue & EMS Impact Fee Update Study

Final Report  
February 28, 2025

***Prepared for:***

**Marion County**  
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Ocala, FL 34471  
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# Marion County

## Fire Rescue & EMS Impact Fee Update Study

### Table of Contents

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**Appendix A:** Population – Supplemental Information

**Appendix B:** Building and Land Value Analysis - Supplemental Information

# I. Introduction

---

With a population of approximately 419,000, Marion County is the 18<sup>th</sup> most populous county in Florida. The County continues to experience growth with a projected annual growth rate of 0.9 percent through 2050 as estimated by the Bureau of Business & Economic Research (BEER), ranking in the top third of Florida counties (17<sup>th</sup> out of 67 counties). Marion County ranked 15<sup>th</sup> for residential permitting in 2023, also indicating high levels of new development.

To address infrastructure needs due to new growth, Marion County adopted a fire rescue impact fee in 2002. In 2010/2011, the County suspended the impact fee program in response to the economic downturn. In 2015, the fire rescue impact fee was repealed by ordinance (Ordinance 15-14). Given the continuing growth and capital needs associated with fire rescue services, the County is interested in implementing a fire rescue impact fee once again and developing an emergency medical services impact fee.

This report serves as the technical study to support the calculation of the updated impact fees. Data presented in this report represents the most recent and localized data available at the time of this update study. All data and support material used in this analysis are incorporated by reference as set forth in this document.

The figures calculated in this study represent the technically defensible level of impact fees that the County could charge; however, the Board of County Commissioners may choose to discount the fees as a policy decision.

## ***Methodology***

This study uses a consumption-based impact fee methodology, which is commonly used throughout Florida. A consumption-based impact fee charges new development based upon the burden placed on services from each land use (demand). The demand component is measured in terms of population per unit in the case of the fire rescue and emergency medical services impact fees.

A consumption-based impact fee charges new growth the proportionate share of the cost of providing additional infrastructure available for use by new growth. Unlike a “needs-based” approach, the consumption-based approach ensures that the impact fee is set at a proportionate rate that generates revenues sufficient to accommodate capital needs due to new growth and

does not generate revenues at a level to correct existing deficiencies or to increase current levels of service. Under this methodology, the County does not need to go through the process of estimating the portion of each capacity expansion project that may be related to existing deficiencies. In addition, per legal requirements, a credit is subtracted from the total cost to account for the value of future contributions of new development from non-impact fee revenue sources toward similar capacity expansion projects. In other words, the “revenue credit” ensures that the new development should not be charged twice for the same service capacity. This credit does not include revenues generated by the existing population.

### ***Legal Overview***

In Florida, legal requirements related to impact fees have primarily been established through case law since the 1980’s. Impact fees must comply with the “dual rational nexus” test, which requires that they:

- Be supported by a study demonstrating that the fees are proportionate in amount to the need created by new development paying the fee; and
- Be spent in a manner that directs a proportionate benefit to new development, typically accomplished through establishment of benefit districts (if needed) and a list of capacity-adding projects included in the County’s Capital Improvement Plan, Capital Improvement Element, or another planning document/Master Plan.

In 2006, the Florida legislature passed the “Florida Impact Fee Act,” which recognized impact fees as “an outgrowth of home rule power of a local government to provide certain services within its jurisdiction.” § 163.31801(2), Fla. Stat. The statute – concerned with mostly procedural and methodological limitations – did not expressly allow or disallow any particular public facility type from being funded with impact fees. In fact, which it was initially adopted, the Act largely codified requirements and standards common to the practice already.

However, the Legislature has amended the Impact Fee Act numerous times since 2006, significantly affecting the impact fee practice in Florida. For this reason, a summary of the key legislative changes since 2006 is provided:

- **HB 227 in 2009:** The Florida legislation statutorily clarified that in any action challenging an impact fee, the government has the burden of proving by a preponderance of the evidence that the imposition or amount of the fee meets the requirements of state legal precedent or the Impact Fee Act and that the court may not use a deferential standard.

- **SB 360 in 2009:** Allowed fees to be decreased without the 90-day notice period required to increase the fees and purported to change the standard of legal review associated with impact fees. SB 360 also required the Florida Department of Community Affairs (now the Department of Commerce) and Florida Department of Transportation (FDOT) to conduct studies on “mobility fees,” which were completed in 2010.
- **HB 7207 in 2011:** Required a dollar-for-dollar credit, for purposes of concurrency compliance, for impact fees paid and other concurrency mitigation required.
- **HB 319 in 2013:** Applied mostly to concurrency management authorities, but also encouraged local governments to adopt alternative mobility systems using a series of tools identified in section 163.3180(5)(f), Florida Statutes.
- **HB 207 in 2019:** Included the following changes to the Impact Fee Act along with additional clarifying language:
  1. Impact fees cannot be collected prior to building permit issuance; and
  2. Impact fee revenues cannot be used to pay debt service for previously approved projects unless the expenditure is reasonably connected to, or has a rational nexus with, the increased impact generated by the new residential and commercial construction.
- **HB 7103 in 2019:** Addressed multiple issues related to affordable housing/linkage fees, impact fees, and building services fees. In terms of impact fees, the bill required that when local governments increase their impact fees, the outstanding impact fee credits for developer contributions should also be increased. This requirement was to operate prospectively; however, HB 337 that was signed in 2021 deleted that clause and making all outstanding credits eligible for this adjustment. HB 7103 also allowed local governments to waive/reduce impact fees for affordable housing projects without having to offset the associated revenue loss.
- **SB 1066 in 2020:** Added language allowing impact fee credits to be assignable and transferable at any time after establishment from one development or parcel to another that is within the same impact fee zone or impact fee district or that is within an adjoining impact fee zone or district within the same local government jurisdiction, and which receives benefit from the improvement or contribution that generated the credits. Added language indicating any new/increased impact fee not being applicable to current or pending permit applications submitted prior to the effective date of an ordinance or resolution imposing new/increased fees.
- **HB 1339 in 2020:** Required reporting of various impact fee related data items within the annual financial audit report submitted to the Department of Financial Services.

- **HB 337 in 2021:** Placed limits on the amount and frequency of fee increases, but also included a clause to exceed these restrictions if the local governments can demonstrate extraordinary circumstances, hold two public workshops discussing these circumstances and the increases are approved by two-thirds of the governing body.
- **HB 479 in 2024:** Required interlocal agreements between counties and municipalities when both entities collect a transportation impact fee. Placed limits on timing of impact fee study completion and adoption and data used in the studies.

The following paragraphs provide further detail on the generally applicable legal standards.

#### Impact Fee Definition

- An impact fee is a one-time capital charge levied against new development.
- An impact fee is designed to cover the portion of the capital costs of infrastructure capacity consumed by new development.
- The principal purpose of an impact fee is to assist in funding the implementation of projects identified in the Capital Improvements Element (CIE) and other capital improvement programs for the respective facility/service categories.

#### Impact Fee vs. Tax

- An impact fee is generally regarded as a regulatory function established based upon the specific benefit to the user related to a given infrastructure type and is not established for the primary purpose of generating revenue for the general benefit of the community, as are taxes.
- Impact fee expenditures must convey a proportional benefit to the fee payer. This is accomplished through the establishment of benefit districts as needed, where fees collected in a benefit district are spent in the same benefit district.
- An impact fee must be tied to a proportional need for new infrastructure capacity created by new development.

This technical report has been prepared to support legal compliance with existing case law and statutory requirements and documents the methodology used for the fire rescue and emergency medical services impact fee calculations, including an evaluation of the inventory, service area, level of service (LOS), cost, credit, and demand components. Information supporting this analysis was obtained from the County and other sources, as indicated.

## II. Facility Inventory

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Marion County owns and operates 32 stations, which includes 20 combined fire rescue and emergency medical services (EMS) stations, ten fire rescue stations, and two EMS stations. Marion County Fire Rescue also operates out of Ocala Station 6, but this space is leased and thus excluded from the impact fee calculations.

**Table 1** shows a summary of County-owned buildings and land inventory associated with the fire rescue and emergency medical services in Marion County. As presented, the inventory includes a total of 267,700 square feet of building space; of which, 173,500 square feet are dedicated to fire related services and 94,200 square feet are dedicated to EMS. The total County-owned land for these buildings is approximately 94 acres. This acreage is allocated to the fire rescue and EMS impact fee inventories based on the square footage utilized for each service.

Building value estimates are based on a review of recent and upcoming project costs, insurance values of existing buildings, cost of similar structures in other Florida jurisdictions, and discussions with the County. Land values are based on a review of recent purchases, appraisals for planned purchases, current value of land where existing facilities are located based on information obtained from the Marion County Property Appraiser as well as vacant land sales and values of similarly sized parcels in Marion County.

Based on this review and analysis, the building value is estimated at \$500 per square foot for career stations, \$300 per square foot for volunteer stations, and \$375 per square foot for office space. The land value is estimated at \$65,000 per acre.

Using these cost estimates results in a total fire rescue building and land value of approximately \$82.1 million; of which, \$77.7 million is for buildings and the remaining \$4.4 million is for land. The total EMS building and land value is approximately \$46.6 million; of which, \$44.9 million is for buildings and the remaining \$1.7 million is for land. A more detailed explanation of building and land value estimates is included in Appendix B.



**Table 1  
Fire Rescue & EMS Building and Land Inventory**

Building Name	Address	Year Built	Bays	Square Footage			Acres			Building Value		Land Value		Total Building & Land Value	
				Fire Rescue <sup>(1)</sup>	EMS <sup>(2)</sup>	Total Square Footage on Parcel <sup>(3)</sup>	Fire Rescue Allocated Acres <sup>(4)</sup>	EMS Allocated Acres <sup>(5)</sup>	Total Site Acreage <sup>(6)</sup>	Fire Rescue <sup>(7)</sup>	EMS <sup>(8)</sup>	Fire Rescue <sup>(9)</sup>	EMS <sup>(10)</sup>	Fire Rescue <sup>(11)</sup>	EMS <sup>(12)</sup>
Fire Rescue Headquarters	2631 SE 3rd Street	1967	0	8,400	5,600	114,403	4.90	3.27	66.76	\$3,150,000	\$2,100,000	\$318,500	\$212,550	\$3,468,500	\$2,312,550
Logistics - Building 2	981 NE 16th Street	1978	0	0	5,000	67,652	0.00	0.32	4.30	\$0	\$1,875,000	\$0	\$20,800	\$0	\$1,895,800
Logistics - Building 3		1979		5,000	0		0.32	0.00		\$1,875,000	\$0	\$20,800	\$0	\$1,895,800	\$0
Operations - Classroom 1		2003		497	331		0.12	0.08		\$186,375	\$124,125	\$7,800	\$5,200	\$194,175	\$129,325
Operations - Classroom 2	3230 SE Maricamp Road	2003	0	497	331	58,374	0.12	0.08	14.20	\$186,375	\$124,125	\$7,800	\$5,200	\$194,175	\$129,325
Operations - Classroom 3		1999		1,231	821		0.30	0.20		\$461,625	\$307,875	\$19,500	\$13,000	\$481,125	\$320,875
Operations - Main Building		1930		7,318	4,878		1.78	1.19		\$2,744,250	\$1,829,250	\$115,700	\$77,350	\$2,859,950	\$1,906,600
Ocala Central	1400 SW 6th Avenue	2024	6	0	19,442	19,442	0.00	0.58	0.58	\$0	\$9,721,000	\$0	\$37,700	\$0	\$9,758,700
Station 1 - Anthony	3199 NE 70th Street	2004	3	5,600	1,400	7,000	1.72	0.43	2.15	\$2,800,000	\$700,000	\$111,800	\$27,950	\$2,911,800	\$727,950
Station 2 - Citra <sup>(13)</sup>	2189 NE 180th LN	1982	3	8,123	0	8,123	5.55	0.00	5.55	\$2,436,900	\$0	\$360,750	\$0	\$2,797,650	\$0
Station 3 - Dunnellon <sup>(13)</sup>	20612 W. Pennsylvania AVE	1965	2	2,353	0	2,353	0.29	0.00	0.29	\$705,900	\$0	\$18,850	\$0	\$724,750	\$0
Station 4 - East Marion	16004 E Hwy 40	1991	3	5,357	2,143	17,913	4.57	1.83	15.28	\$2,678,500	\$1,071,500	\$297,050	\$118,950	\$2,975,550	\$1,190,450
Station 5 - Florida Highlands <sup>(13)</sup>	9972 SW 155th Street	1984	0	3,510	0	3,510	1.25	0.00	1.25	\$1,053,000	\$0	\$81,250	\$0	\$1,134,250	\$0
Station 6 - South Forest	15490 SE 182nd Avenue Road	1995	3	5,088	0	5,088	3.00	0.00	3.00	\$2,544,000	\$0	\$195,000	\$0	\$2,739,000	\$0
Station 7 - Ft. McCoy	11575 NE 146th Place	2011	3	6,815	3,407	10,222	2.11	1.05	3.16	\$3,407,500	\$1,703,500	\$137,150	\$68,250	\$3,544,650	\$1,771,750
Station 9 - Orange Lake	18945 N US Hwy 441	1980	3	5,243	2,622	7,865	0.81	0.40	1.21	\$2,621,500	\$1,311,000	\$52,650	\$26,000	\$2,674,150	\$1,337,000
Station 10 - Villages	8220 SE 165th Mulberry Lane	2002	3	3,125	3,125	6,250	0.69	0.68	1.37	\$1,562,500	\$1,562,500	\$44,850	\$44,200	\$1,607,350	\$1,606,700
Station 11 - North Marion	12250 NW Gainesville Road	1985	3	4,143	0	4,143	2.03	0.00	2.03	\$2,071,500	\$0	\$131,950	\$0	\$2,203,450	\$0
Station 12 - Meadowood Farms	120 NW 110th Avenue	2005	2	5,836	2,335	8,171	1.32	0.53	1.85	\$2,918,000	\$1,167,500	\$85,800	\$34,450	\$3,003,800	\$1,201,950
Station 13 - Orange Springs <sup>(13)</sup>	23520 NE Hwy 315	1984	0	2,600	0	2,600	0.87	0.00	0.87	\$780,000	\$0	\$56,550	\$0	\$836,550	\$0
Station 14 - Rainbow Lakes Estates <sup>(13)</sup>	3105 SW Ivy Place	1979	4	4,916	0	11,572	6.34	0.00	14.92	\$1,474,800	\$0	\$412,100	\$0	\$1,886,900	\$0
Station 15 - Salt Springs	14463 NE 250th Avenue	2007	3	5,447	2,724	11,826	4.03	2.02	8.75	\$2,723,500	\$1,362,000	\$261,950	\$131,300	\$2,985,450	\$1,493,300
Station 16 - Shady	7151 S Magnolia Avenue	1974	3	8,178	2,044	10,222	1.60	0.40	2.00	\$4,089,000	\$1,022,000	\$104,000	\$26,000	\$4,193,000	\$1,048,000
Station 17 - Silver Springs Shores	2122 Pine Road	1986	3	3,480	1,740	5,220	0.68	0.34	1.02	\$1,740,000	\$870,000	\$44,200	\$22,100	\$1,784,200	\$892,100
Station 18 - Belleview	11941 SE 55th Avenue Road	2010	3	7,077	3,145	10,222	1.56	0.70	2.26	\$3,538,500	\$1,572,500	\$101,400	\$45,500	\$3,639,900	\$1,618,000
Station 19 - Sparr	13323 NE Jacksonville Road	1997	3	4,226	1,691	5,917	2.14	0.86	3.00	\$2,113,000	\$845,500	\$139,100	\$55,900	\$2,252,100	\$901,400
Station 20 - Golden Ocala	3600 NW 70th Avenue Road	2005	4	7,081	3,540	10,621	1.09	0.55	1.64	\$3,540,500	\$1,770,000	\$70,850	\$35,750	\$3,611,350	\$1,805,750
Station 21 - Friendship	7884 SW 90th Street	2009	3	5,841	4,381	10,222	1.13	0.85	1.98	\$2,920,500	\$2,190,500	\$73,450	\$55,250	\$2,993,950	\$2,245,750
Station 22 - Rainbow Springs	19995 SW 86th Street Suite 001	1987	3	4,777	2,388	14,111	1.48	0.74	4.36	\$2,388,500	\$1,194,000	\$96,200	\$48,100	\$2,484,700	\$1,242,100
Station 23 - Majestic Oaks	8526 SW 49th Avenue Road	2023	0	2,520	0	2,520	3.00	0.00	3.00	\$1,260,000	\$0	\$195,000	\$0	\$1,455,000	\$0
Station 24 - Marion Oaks	102 Marion Oaks Lane	1983	3	4,795	2,397	7,192	1.61	0.80	2.41	\$2,397,500	\$1,198,500	\$104,650	\$52,000	\$2,502,150	\$1,250,500
Station 25 - Lake Tropicana <sup>(13)</sup>	17700 SW 36th Loop	1986	0	3,510	0	3,510	1.42	0.00	1.42	\$1,053,000	\$0	\$92,300	\$0	\$1,145,300	\$0
Station 26 - Electra <sup>(13)</sup>	5420 SE 180th Avenue Road	1988	0	6,084	0	6,084	1.19	0.00	1.19	\$1,825,200	\$0	\$77,350	\$0	\$1,902,550	\$0
Station 27 - Weirsdale	16355 S Hwy 25	1989	3	4,040	2,020	6,060	0.66	0.33	0.99	\$2,020,000	\$1,010,000	\$42,900	\$21,450	\$2,062,900	\$1,031,450
Station 28 - Rolling Greens	5907 Cherry Road	2019	3	4,023	4,023	8,046	0.72	0.73	1.45	\$2,011,500	\$2,011,500	\$46,800	\$47,450	\$2,058,300	\$2,058,950
Station 30 - Spruce Creek	7900 SE 135th Street	2008	3	5,111	5,111	10,222	4.67	4.66	9.33	\$2,555,500	\$2,555,500	\$303,550	\$302,900	\$2,859,050	\$2,858,400
Station 31 - Ray Lloyd	11240 SW Hwy 484	2009	3	5,679	4,543	10,222	2.22	1.78	4.00	\$2,839,500	\$2,271,500	\$144,300	\$115,700	\$2,983,800	\$2,387,200
Station 32 - Liberty	11350 SW 49th Avenue	2009	2	5,993	2,996	8,989	0.92	0.46	1.38	\$2,996,500	\$1,498,000	\$59,800	\$29,900	\$3,056,300	\$1,527,900
<b>Total</b>				<b>173,514</b>	<b>94,178</b>		<b>68.21</b>	<b>25.86</b>		<b>\$77,669,925</b>	<b>\$44,968,875</b>	<b>\$4,433,650</b>	<b>\$1,680,900</b>	<b>\$82,103,575</b>	<b>\$46,649,775</b>
<b>Building Value per Square Foot<sup>(14)</sup></b>										<b>\$448</b>	<b>\$477</b>				
<b>Land Value per Acre<sup>(15)</sup></b>												<b>\$65,000</b>			

1) Source: Marion County Fire Rescue Department. Figures shown are the square footage dedicated to fire rescue services.

- 2) Source: Marion County Fire Rescue Department. Figures shown are the square footage dedicated to EMS.
- 3) Source: Marion County Property Appraiser & Marion County Fire Rescue Department. Total building square footage on the parcel.
- 4) Total acres (Item 6) divided by total square footage (Item 3) multiplied by fire rescue square footage (Item 1)
- 5) Total acres (Item 6) divided by total square footage (Item 3) multiplied by EMS square footage (Item 2)
- 6) Source: Marion County Property Appraiser & Marion County Fire Rescue Department
- 7) Fire rescue square footage (Item 1) multiplied by building value per square foot (\$500 for career stations, \$300 for volunteer/long-term leased stations and \$375 for office space)
- 8) Emergency medical services square footage (Item 2) multiplied by building value per square foot (\$500 for stations and \$375 for office space and main operations building.
- 9) Fire rescue allocated acres (Item 4) multiplied by land value per acre (Item 15)
- 10) Emergency medical services allocated acres (Item 5) multiplied by land value per acre (Item 15)
- 11) Sum of fire rescue building and land value (Items 7 and 9)
- 12) Sum of fire rescue building and land value (Items 8 and 10)
- 13) Station is a volunteer. The building value is calculated using \$240 per square foot.
- 14) Total building value (Item 7 and Item 8) divided by building square footage (Item 1 and Item 2)
- 15) Source: Appendix B

In addition to the buildings and land inventory, Marion County also has the necessary vehicles to perform fire rescue and emergency medical services. **Table 2** summarizes the total vehicle inventory value for fire rescue and emergency medical services. As shown, the value of fire rescue services related vehicles is estimated at \$83.2 million and the value of emergency medical services related vehicles is \$35.8 million.

**Table 2  
Fire Rescue and EMS Vehicle Inventory**

Description	Units <sup>(1)</sup>	Unit Value <sup>(2)</sup>	Total Value <sup>(3)</sup>
<b>Fire Rescue</b>			
Spare Engine	13	\$1,200,000	\$15,600,000
Front Line Engines	34	\$1,200,000	\$40,800,000
Ladders/Towers	5	\$2,250,000	\$11,250,000
Brush Truck	37	\$175,000	\$6,475,000
Special Event Trucks/Training Truck	2	\$475,000	\$950,000
Tankers	16	\$300,000	\$4,800,000
<b>Subtotal -- Fire Rescue</b>			<b>\$79,875,000</b>
<b>Emergency Medical Services</b>			
Type I Ambulance/Rescue	58	\$475,000	\$27,550,000
Heavy Rescue	3	\$2,000,000	\$6,000,000
<b>Subtotal -- Emergency Medical Services</b>			<b>\$33,550,000</b>
<b>Fire Rescue &amp; Emergency Medical Services<sup>(4)</sup></b>			
Support Vehicle	62	\$90,000	\$5,580,000
<b>Subtotal -- Fire Rescue &amp; Emergency Medical Services</b>			<b>\$5,580,000</b>
<b>Subtotal -- Fire Rescue Portion</b>			<b>\$3,348,000</b>
<b>Subtotal --Emergency Medical Services Portion</b>			<b>\$2,232,000</b>
<b>Total -- Fire Rescue</b>			<b>\$83,223,000</b>
<b>Total -- Emergency Medical Services</b>			<b>\$35,782,000</b>

- 1) Source: Marion County Fire Rescue Department
- 2) Source: Marion County Fire Rescue Department. Unit value reflects cost for fully equipped vehicles.
- 3) Units (Item 1) multiplied by the unit value (Item 2)
- 4) Administrative vehicles are utilized by fire rescue and emergency medical services personnel. The Department indicated that 60 percent of these vehicles are utilized by the fire rescue services personnel and the other 40 percent by emergency medical services personnel.

### III. Service Area and Demand Component

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Marion County provides emergency medical services countywide and fire rescue services countywide excluding the City of Ocala. The City of Ocala has a separate Fire Department that provides fire rescue services in the city.

In this technical study, the current 2025 weighted and functional population estimates are used to develop the demand component. Because simply using weighted (permanent, plus weighted seasonal) population estimates does not fully address daily workers and visitors who also benefit from fire rescue and EMS, the “functional” weekly 24-hour population approach is used to establish a common unit of demand across different land uses. Functional population accounts for residents, visitors, and workers traveling in and out of the service area throughout the day and calculates the presence of population at the different land uses during the day, which represents the demand component of the impact fee equation. Appendix A provides further detail on the population analysis conducted.

# IV. Level of Service

Marion County is served by 30 stations for fire rescue services, which results in a current level of service (LOS) of almost 12,100 weighted seasonal residents per station or 0.083 stations per 1,000 weighted seasonal residents. In terms of functional residents, the County’s achieved LOS is 9,700 functional residents per station or 0.103 stations per 1,000 functional residents.

For EMS, the current level of service (LOS) is 19,700 weighted seasonal residents per station or 0.051 stations per 1,000 weighted seasonal residents. In terms of functional residents, the County’s achieved LOS is 18,100 functional residents per station or 0.055 stations per 1,000 functional residents. Impact fee calculations assume that the County will continue to provide this achieved LOS in the future.

**Table 3**  
**Current Level of Service (2025)**

Variable	2025 Population	
	Weighted	Functional
<b><i>Fire Rescue</i></b>		
Fire Rescue Service Area Population <sup>(1)</sup>	362,827	289,997
Number of Stations <sup>(2)</sup>	30	30
Population per Station <sup>(3)</sup>	12,094	9,667
<b>Achieved LOS (Stations per 1,000 Population)<sup>(4)</sup></b>	<b>0.083</b>	<b>0.103</b>
<b><i>Emergency Medical Services</i></b>		
Emergency Medical Services Service Area Population <sup>(1)</sup>	434,360	398,892
Number of Stations <sup>(2)</sup>	22	22
Population per Station <sup>(3)</sup>	19,744	18,131
<b>Achieved LOS (Stations per 1,000 Population)<sup>(4)</sup></b>	<b>0.051</b>	<b>0.055</b>

- 1) Source: Appendix A, Table A-1 for weighted population, Table A-9 for functional population
- 2) Source: Table 1
- 3) Population (Item 1) divided by the number of stations (Item 2)
- 4) Number of stations (Item 2) divided by the population (Item 1) multiplied by 1,000

**Table 4** compares the fire rescue levels of service for other select Florida counties to the LOS of Marion County. The LOS is displayed in terms of permanent population for 2024 for the service area of all entities. As shown, Marion County’s current LOS is in the mid-range of the LOS of the other jurisdictions reviewed.

**Table 4  
Level of Service Comparison (Fire Rescue)**

<b>Jurisdiction</b>	<b>Fire Rescue Stations<sup>(1)</sup></b>	<b>Fire Rescue Service Area Population (2024)<sup>(2)</sup></b>	<b>Residents per Station<sup>(3)</sup></b>	<b>LOS (Stations per 1,000 Residents)<sup>(4)</sup></b>
Pasco County	29	592,842	20,443	0.049
Citrus County	10	154,713	15,471	0.065
Hernando County	14	200,825	14,345	0.070
Sumter County	9	124,779	13,864	0.072
Levy County	3	35,600	11,867	0.084
<b>Marion County</b>	<b>30</b>	<b>349,954</b>	<b>11,665</b>	<b>0.086</b>
Alachua County	15	129,022	8,601	0.116
Lake County	29	219,547	7,571	0.132
Volusia County	20	125,795	6,290	0.159

- 1) County/department websites
- 2) Source: University of Florida, Bureau of Economic & Business Research (BEBR) Florida Estimates of Population, April 1, 2024
- 3) Fire rescue service area population (Item 2) divided by the number of fire stations (Item 1)
- 4) Number of fire rescue stations (Item 1) divided by the fire rescue service area population (Item 2) divided by 1,000

## V. Cost Component

The cost component of the study evaluates the cost of all capital items, including buildings, land, and vehicles. **Table 5** provides a summary of all capital assets, which amounts to approximately \$165.3 million for fire rescue related services and \$82.4 million for emergency medical services.

Also shown in Table 5 is the total impact cost per functional resident. The total impact cost is calculated at \$568 per functional resident for fire rescue facilities and \$206 per functional resident for EMS facilities.

**Table 5**  
**Total Impact Cost per Functional Resident**

Variable	Fire Rescue		Emergency Medical Services	
	Figure	Percent of Total <sup>(9)</sup>	Figure	Percent of Total <sup>(9)</sup>
Building Value <sup>(1)</sup>	\$77,669,925	47%	\$44,968,875	55%
Land Value <sup>(2)</sup>	\$4,433,650	3%	\$1,680,900	2%
Vehicle and Equipment Value <sup>(3)</sup>	\$83,223,000	50%	\$35,782,000	43%
<b>Total Asset Value<sup>(4)</sup></b>	<b>\$165,326,575</b>	<b>100%</b>	<b>\$82,431,775</b>	<b>100%</b>
Number of Stations <sup>(5)</sup>	30		22	
<b>Total Asset Value per Station<sup>(6)</sup></b>	<b>\$5,510,886</b>		<b>\$3,746,899</b>	
Achieved LOS (Stations per 1,000 Functional Residents) <sup>(7)</sup>	0.103		0.055	
<b>Total Impact Cost per Functional Resident<sup>(8)</sup></b>	<b>\$567.62</b>		<b>\$206.08</b>	

1) Source: Table 1

2) Source: Table 1

3) Source: Table 2

4) Sum of the building value (Item 1), land value (Item 2), and vehicle value (Item 3)

5) Source: Table 1

6) Total asset value (Item 4) divided by the number of owned stations (Item 5)

7) Source: Table 3

8) Total asset value per station (Item 6) multiplied by the current LOS (Item 7) divided by 1,000

9) Distribution of total asset value

## VI. Credit Component

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To avoid overcharging new development, a review of the capital funding program for fire rescue and EMS was completed. The purpose of this review was to determine any potential revenue credits generated by new development that are being used for expansion of capital facilities, land, and vehicles included in the inventory. It should be noted that the credit component does not include any capital renovation, maintenance, or operations expenses, as these types of expenditures cannot be funded with impact fee revenues.

### Capital Expansion “Cash” Credit

To calculate the capital expansion “cash” credit per functional resident, funding sources used for the past six years as well as those programmed for the next four years are reviewed. Between FY 2019 and FY 2028, the County has allocated an average annual non-impact fee funding of \$1.4 million toward fire rescue and \$1.2 million towards EMS utilizing revenues from the infrastructure sales tax and Fire Operating Fund. The average annual capital expansion expenditures were divided by the average annual functional residents for the same period to calculate the average annual capital expansion credit per functional resident. As presented in **Table 6**, the result is approximately \$5 per functional resident for fire rescue capital facilities and \$3 per functional resident for EMS facilities.



**Table 6  
Capital Expansion "Cash" Credit**

Description <sup>(1)</sup>	FY 2019 to FY 2028		
	Fire Rescue	EMS	Total
<b>Fire Operating Fund</b>			
Support Vehicle	\$77,957	\$51,971	\$129,928
<b>Subtotal -- Fire Operating Fund</b>	<b>\$77,957</b>	<b>\$51,971</b>	<b>\$129,928</b>
<b>Infrastructure Sales Tax</b>			
Type I Ambulance/Rescue	-	\$2,486,330	\$2,486,330
Front Line Engines	\$2,648,234	-	\$2,648,234
Brush Truck	\$153,684	-	\$153,684
Support Vehicle	\$63,811	\$42,541	\$106,352
Fire Station 28 <sup>(2)</sup>	\$472,300	\$472,300	\$944,600
Fire Station 2 Rebuild	\$5,180,180	-	\$5,180,180
Fire Station 20 Parking Lot	\$488,536	\$244,231	\$732,767
Fire Station 11 Rebuild <sup>(3)</sup>	\$3,917,897	-	\$3,917,897
Fire Station 24 Marion Oaks <sup>(4)</sup>	\$25,897	\$12,946	\$38,843
Martel Ph3 Training Pad	\$2,100	\$1,400	\$3,500
Fire Station 20 Golden Ocala Expansion <sup>(5)</sup>	\$767,598	\$383,742	\$1,151,340
Fire EMS Ocala Central	-	\$8,497,588	\$8,497,588
<b>Subtotal -- Infrastructure Sales Tax</b>	<b>\$13,720,237</b>	<b>\$12,141,078</b>	<b>\$25,861,315</b>
<b>Total Capital Expansion "Cash" Expenditures</b>	<b>\$13,798,194</b>	<b>\$12,193,049</b>	<b>\$25,991,243</b>
Average Annual Capital Expansion "Cash" Expenditures <sup>(6)</sup>	\$1,379,819	\$1,219,305	
Average Annual Functional Population <sup>(7)</sup>	280,925	387,051	
<b>Capital Expansion "Cash" Expenditures per Functional Resident<sup>(8)</sup></b>	<b>\$4.91</b>	<b>\$3.15</b>	

1) Source: Marion County Fire Rescue Department

2) The expenditure amount shown is 37% of the total expenditures, reflecting the expansion portion of the project.

3) The expenditure amount shown is 69% of the total expenditures, reflecting the expansion portion of the project.

4) The expenditure amount shown is 31% of the total expenditures, reflecting the expansion portion of the project.

5) The expenditure amount shown is 34% of the total expenditures, reflecting the expansion portion of the project.

6) Total capital expansion "cash" expenditures divided by 10 to calculate the average annual expenditures

7) Source: Appendix A, Table A-9, average annual functional population during the same time period

8) Average annual capital expansion "cash" expenditures (Item 6) divided by the average annual functional population (Item 7)

## VII. Net Impact Cost

The net fire rescue and EMS impact cost per functional resident is the difference between the cost component and the credit component. **Table 7** summarizes the calculation of the net fire rescue and EMS impact cost per functional resident. As presented, the net impact cost per functional resident amounts to approximately \$477 per functional resident for fire rescue facilities and \$148 per functional resident for EMS facilities.

**Table 7**  
**Net Fire Rescue and EMS Impact Cost per Functional Resident**

Variable	Fire Rescue	EMS
Total Impact Cost per Functional Resident <sup>(1)</sup>	\$567.62	\$206.08
<b>Revenue Credit</b>		
Average Annual Capital Expansion "Cash" Credit per Functional Resident <sup>(2)</sup>	\$4.91	\$3.15
- Capitalization Rate	2.45%	2.45%
- Capitalization Period (years)	25	25
Total Capital Expansion Credit per Functional Resident <sup>(3)</sup>	\$90.98	\$58.37
<b>Net Impact Cost</b>		
<b>Net Impact Cost per Functional Resident<sup>(6)</sup></b>	<b>\$476.64</b>	<b>\$147.71</b>

1) Source: Table 5

2) Source: Table 6

3) Average annual capital expansion "cash" credit per functional resident (Item 2) over a capitalization rate of 2.45% for 25 years. The capitalization rate estimate was provided by Marion County.

4) Total impact cost per functional resident (Item 1) less total capital expansion credit per functional resident (Item 3)

## VIII. Calculated Fire Rescue & EMS Impact Fee Schedule

Based on the analysis presented in this report, fire rescue and EMS impact fee schedules were developed for residential and non-residential land uses. **Table 8** presents the calculated impact fees.

**Table 8**  
**Fire Rescue and EMS Impact Fee Schedule**

ITE LUC	Land Use	Impact Unit	Fire Rescue		EMS		Fire Rescue and EMS Calculated Impact Fee <sup>(5)</sup>
			Functional Residents per Unit <sup>(1)</sup>	Calculated Impact Fee <sup>(2)</sup>	Functional Residents per Unit <sup>(3)</sup>	Calculated Impact Fee <sup>(4)</sup>	
<b>RESIDENTIAL:</b>							
210	Single Family						
	- 1,500 sf or less	du	1.39	\$663	1.41	\$208	\$871
	- 1,501 to 2,499 sf	du	1.58	\$753	1.61	\$238	\$991
	- 2,500 sf and greater	du	1.74	\$829	1.77	\$261	\$1,090
220/221/222	Multi-Family	du	1.06	\$505	1.17	\$173	\$678
240	Mobile Home	du	1.35	\$643	1.34	\$198	\$841
251	Senior Adult Housing - Detached	du	0.95	\$453	0.97	\$143	\$596
252	Senior Adult Housing - Attached	du	0.63	\$300	0.70	\$103	\$403
<b>TRANSIENT, ASSISTED, GROUP:</b>							
253	Congregate/Assisted Care Facility	du	0.83	\$396	0.89	\$131	\$527
310	Hotel	room	1.19	\$567	1.19	\$176	\$743
320	Motel	room	1.02	\$486	1.02	\$151	\$637
620	Nursing Home	bed	1.03	\$491	1.03	\$152	\$643
<b>RECREATIONAL:</b>							
411	Public Park	acre	0.04	\$19	0.04	\$6	\$25
416	RV Park/Campground	site	0.46	\$219	0.46	\$68	\$287
420	Marina	berth	0.12	\$57	0.12	\$18	\$75
430	Golf Course	hole	0.80	\$381	0.80	\$118	\$499
445	Movie Theater	screen	4.64	\$2,212	4.64	\$685	\$2,897
492	Racquet Club/Health Spa	1,000 sf	2.10	\$1,001	2.10	\$310	\$1,311
495	Recreational Community Center	1,000 sf	1.81	\$863	1.81	\$267	\$1,130
<b>INSTITUTIONAL:</b>							
520	Elementary School (Private)	student	0.10	\$48	0.10	\$15	\$63
522	Middle School (Private)	student	0.09	\$43	0.09	\$13	\$56
525	High School (Private)	student	0.08	\$38	0.08	\$12	\$50
540	University/Junior College (7,500 or fewer students) (Private)	student	0.10	\$48	0.10	\$15	\$63
550	University/Junior College (more than 7,500 students) (Private)	student	0.08	\$38	0.08	\$12	\$50
560	Church	1,000 sf	0.47	\$224	0.47	\$69	\$293
565	Day Care Center	1,000 sf	0.85	\$405	0.85	\$126	\$531
590	Library	1,000 sf	2.05	\$977	2.05	\$303	\$1,280
<b>MEDICAL:</b>							
610	Hospital	1,000 sf	1.28	\$610	1.28	\$189	\$799
640	Animal Hospital/Veterinary Clinic	1,000 sf	1.36	\$648	1.36	\$201	\$849
<b>OFFICE:</b>							
710	Office	1,000 sf	0.95	\$453	0.95	\$140	\$593
720	Medical Office/Clinic	1,000 sf	1.16	\$553	1.16	\$171	\$724
770	Business Park	1,000 sf	0.92	\$439	0.92	\$136	\$575
<b>RETAIL:</b>							
822	Retail 6,000 sfgla or less	1,000 sfgla	1.97	\$939	1.97	\$291	\$1,230
822	Retail 6,001 to 40,000 sfgla	1,000 sfgla	1.97	\$939	1.97	\$291	\$1,230
821	Retail 40,001 to 150,000 sfgla	1,000 sfgla	2.74	\$1,306	2.74	\$405	\$1,711
820	Retail greater than 150,000 sfgla	1,000 sfgla	1.88	\$896	1.88	\$278	\$1,174
840/841	New/Used Auto Sales	1,000 sf	1.47	\$701	1.47	\$217	\$918
850	Supermarket	1,000 sf	2.26	\$1,077	2.26	\$334	\$1,411
862	Home Improvement Superstore	1,000 sf	1.81	\$863	1.81	\$267	\$1,130

**Table 8 (Continued)**  
**Fire Rescue and EMS Impact Fee Schedule**

ITE LUC	Land Use	Impact Unit	Fire Rescue		EMS		Fire Rescue and EMS Calculated Impact Fee <sup>(5)</sup>
			Functional Residents per Unit <sup>(1)</sup>	Calculated Impact Fee <sup>(2)</sup>	Functional Residents per Unit <sup>(3)</sup>	Calculated Impact Fee <sup>(4)</sup>	
<b>RETAIL:</b>							
880/881	Pharmacy/Drug Store with or w/o Drive-Thru	1,000 sf	1.69	\$806	1.69	\$250	\$1,056
890	Furniture Store	1,000 sf	0.31	\$148	0.31	\$46	\$194
<b>SERVICES:</b>							
911	Bank/Savings Walk-In	1,000 sf	1.10	\$524	1.10	\$162	\$686
912	Bank/Savings Drive-In	1,000 sf	1.42	\$677	1.42	\$210	\$887
931	Restaurant	1,000 sf	5.73	\$2,731	5.73	\$846	\$3,577
n/a	Small Local Restaurant	1,000 sf	4.91	\$2,340	4.91	\$725	\$3,065
941	Quick Lube	service bay	1.52	\$724	1.52	\$225	\$949
942	Automobile Care Center	1,000 sf	1.55	\$739	1.55	\$229	\$968
944	Gas Station w/Convenience Store <2,000 sq ft	fuel pos.	1.32	\$629	1.32	\$195	\$824
945	Gas Station w/Convenience Store 2,000 to 5,499 sq ft	fuel pos.	2.08	\$991	2.08	\$307	\$1,298
945	Gas Station w/Convenience Store 5,500+ sq ft	fuel pos.	2.71	\$1,292	2.71	\$400	\$1,692
947	Self-Service Car Wash	service bay	0.87	\$415	0.87	\$129	\$544
948	Automated Car Wash	car tunnel	9.62	\$4,585	9.62	\$1,421	\$6,006
<b>INDUSTRIAL:</b>							
110	General Light Industrial	1,000 sf	0.45	\$214	0.45	\$66	\$280
140	Manufacturing	1,000 sf	0.53	\$253	0.53	\$78	\$331
150	Warehousing	1,000 sf	0.10	\$48	0.10	\$15	\$63
151	Mini-Warehouse	1,000 sf	0.03	\$14	0.03	\$4	\$18
154	High-Cube Transload and Short-Term Warehouse	1,000 sf	0.14	\$67	0.14	\$21	\$88

- 1) Source: Appendix A, Table A-11 for residential and transient, assisted, group land uses and Table A-12 for non-residential land uses
- 2) Net impact cost per functional resident for fire rescue services from Table 7 multiplied by the functional residents per unit (Item 1) for each land use
- 3) Source: Appendix A, Table A-10 for residential and transient, assisted, group land uses and Table A-12 for non-residential land uses
- 4) Net impact cost per functional resident for EMS from Table 7 multiplied by the functional residents per unit (Item 3) for each land use
- 5) Sum of fire rescue and EMS calculated impact fees (Items 2 and 4)

## IX. Impact Fee Schedule Comparison

As part of the work effort in updating Marion County’s impact fee program, comparisons of the fire rescue and EMS impact fee schedules were completed for other counties. **Table 9** presents the fire rescue and EMS impact fee comparison.

**Table 9  
Fire Rescue & EMS Impact Fee Schedule Comparison**

Land Use	Unit <sup>(2)</sup>	Marion County Calculated <sup>(3)</sup>	Alachua County <sup>(4)</sup>	Citrus County <sup>(5)</sup>	Hernando County <sup>(6)</sup>	Lake County <sup>(7)</sup>	Pasco County <sup>(8)</sup>	Seminole County <sup>(9)</sup>	Volusia County <sup>(10)</sup>
Date of Last Update		2025	2005	2021	2022	2022	2003	2021	2022
Assessed Portion of Calculated <sup>(1)</sup>		N/A	100%	100%	N/A	Varies-SF @99%	100%	100%	100%
<b>Residential:</b>									
Single Family Detached (2,000 sq ft)	du	\$991	\$152	\$343	\$320	\$585	\$420	\$497	\$667
<b>Non-Residential:</b>									
General Light Industrial	1,000 sf	\$280	\$76	\$89	\$95	\$156	\$549	\$163	\$232
Office (50,000 sq ft)	1,000 sf	\$593	\$76	\$206	\$195	\$322	\$549	\$290	\$450
Retail/Shopping Center (125,000 sq ft)	1,000 sf	\$1,711	\$76	\$433	\$512	\$859	\$549	\$491	\$1,201

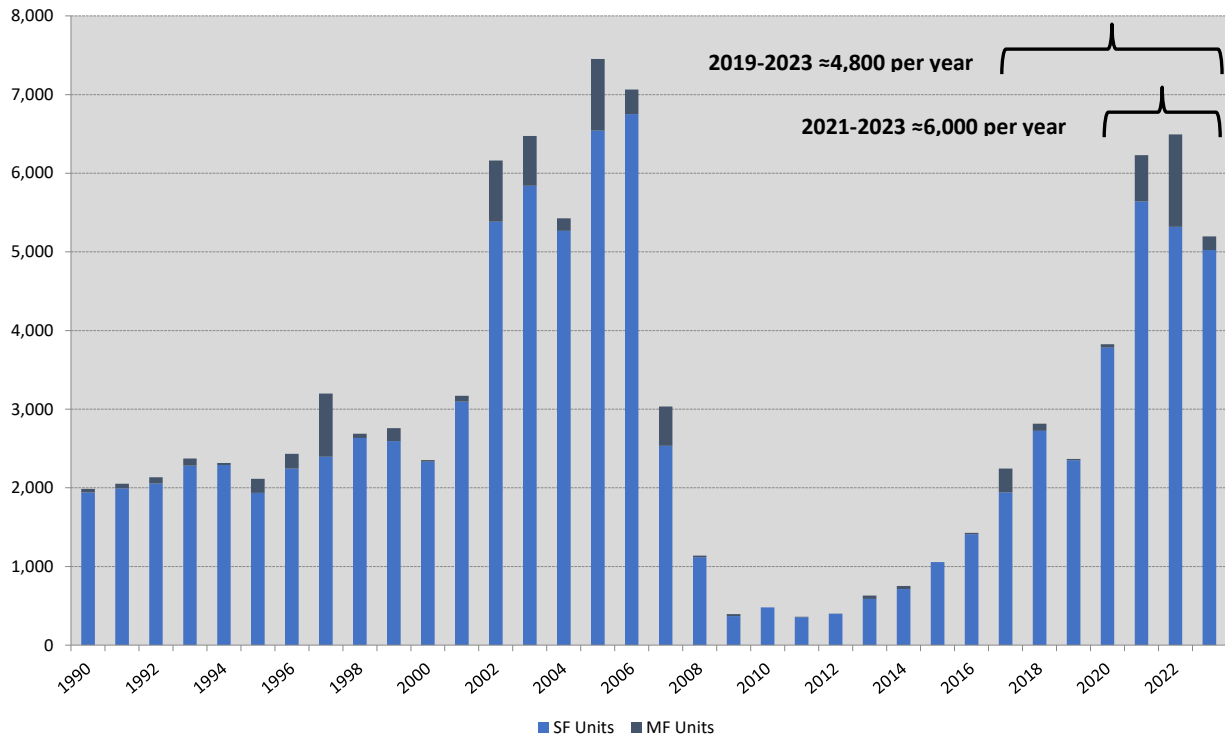
- 1) Represents that portion of the maximum calculated fee for each respective county that is actually charged. Fees may have been lowered through indexing or policy discounts. Does not account for moratoriums/suspensions
- 2) du = dwelling unit
- 3) Source: Table 8, combined Fire Rescue & EMS
- 4) Source: Alachua County Department of Growth Management. Fee shown is the fire rescue impact fee.
- 5) Source: Citrus County Department of Growth Management, Land Development Division. Fee shown is the sum of the fire rescue and EMS impact fees.
- 6) Source: Hernando County. Fee shown is the sum of the fire rescue and EMS impact fees. Fees shown effective July 30, 2025.
- 7) Source: Lake County Planning and Zoning. Fees shown reflect fire rescue impact fee. Fees adopted in compliance with the 50% limit and phasing requirements per F.S. 163.31801. Fees shown reflect fully phased-in fees effective January 2, 2027.
- 8) Source: Pasco County FL, Code of Ordinances. Fee shown is sum of fire rescue and EMS impact fees.
- 9) Source: Seminole County Department of Development Services. Fee shown reflects "fire & rescue" impact fee.
- 10) Source: Volusia County Growth and Resource Management. Fee shown is the sum of the fire rescue and EMS impact fees.

# X. Fire Rescue and EMS Revenue Projections

The EMS impact fee revenue projections presented in this report are based on recent residential permitting levels countywide. As shown in Figure 1, Marion County has experienced a significant increase in permitting levels over the past five years.

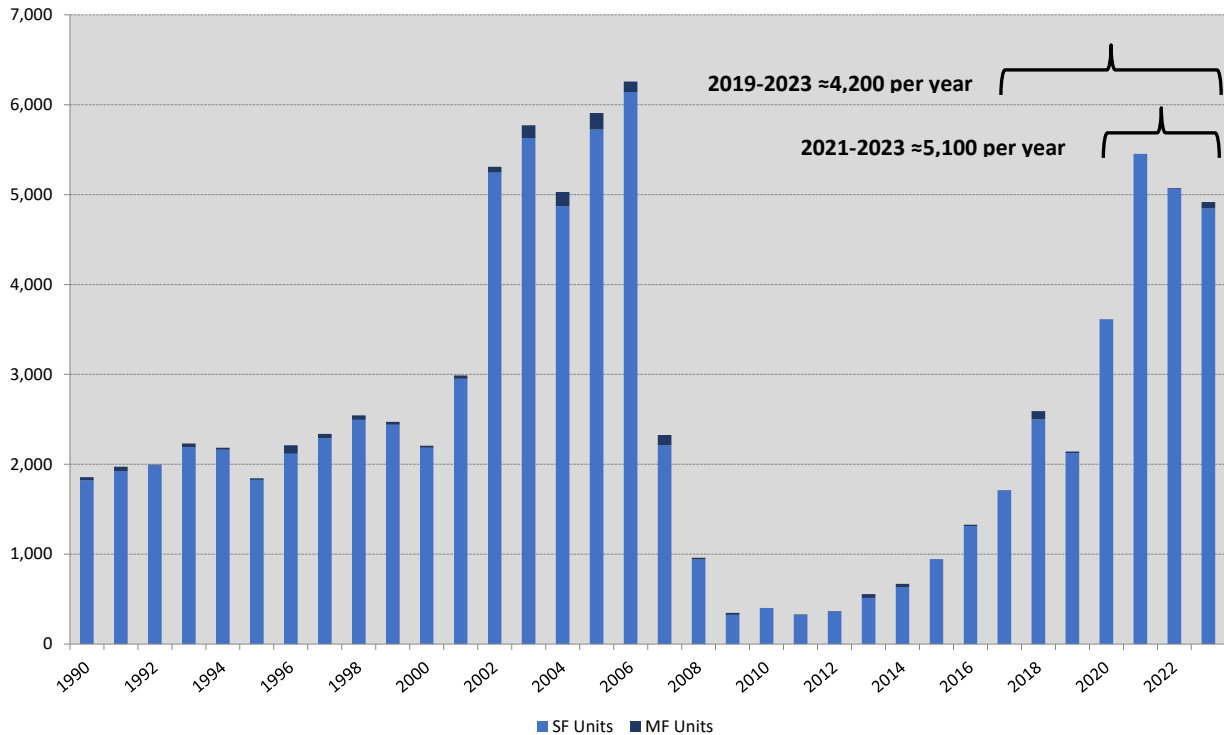
The fire rescue impact fee revenue projections are based on residential permitting countywide excluding the City of Ocala. As previously mentioned, the City of Ocala has a separate Fire Department that provides fire rescue services in the city. As shown in **Figure 2**, residential permitting in the fire rescue service area has also significantly increased in recent years.

**Figure 1**  
**Countywide Residential Permitting**



Source: U.S. Census Bureau

**Figure 2**  
**Fire Rescue Service Area Residential Permitting**



Source: U.S. Census Bureau

Given fluctuations in permitting levels, a range of projection scenarios was developed. For the low-end, residential permitting was based on the average permitting level since 2019 (approximately 4,200 units for fire rescue service area and 4,800 units for countywide) and for the high-end, residential permitting was based on the average permitting levels since 2021 (approximately 5,100 units for fire rescue service area and 6,000 units for countywide). Other assumptions/estimates used in the projections include the following:

- Non-residential revenues account for approximately 15 percent of total revenue collected. This estimate is based on the tax base distribution in Marion County and historical transportation impact fee collections.
- Since there are no recent historical fire rescue impact fee collections, Benesch validated the revenue model by comparing the transportation revenue estimates to actual transportation revenue collections over the past five years. This comparison suggested an average revenue loss of about 20 percent per year due to developer credits and other factors. In the case of fire rescue and EMS impact fees, this adjustment factor was reduced to 10 percent since there tend to be fewer cases of developer contributions.

**Table 10** presents the fire rescue and EMS impact fee revenue projections. With the calculated fire rescue impact fees, the County has the potential to generate \$16.9 million to \$20.5 million over a five-year period. For the EMS calculated impact fees, the County has the potential to generate between \$5.9 million and \$7.3 million in revenues over the next five years.

**Table 10  
Fire Rescue Impact Fee Revenue Projections**

<b>Service Area</b>	<b>Annual (Low-End)</b>	<b>Annual (High-End)</b>	<b>5-Yr Estimate (Low-End)</b>	<b>5-Yr Estimate (High-End)</b>
Fire Rescue <sup>(1)</sup>	\$3,375,000	\$4,098,000	\$16,875,000	\$20,490,000
EMS <sup>(2)</sup>	\$1,187,000	\$1,462,000	\$5,935,000	\$7,310,000
<b>Total<sup>(3)</sup></b>	<b>\$4,562,000</b>	<b>\$5,560,000</b>	<b>\$22,810,000</b>	<b>\$27,800,000</b>

- 1) Fire rescue impact fee revenue projections based on recent residential permitting and the fire rescue impact fees calculated in this study
- 2) EMS impact fee revenue projections based on recent residential permitting and the EMS impact fees calculated in this study
- 3) Sum of fire rescue and EMS impact fee revenue projections (Items 1 and 2)

For impact fee purposes, revenue projections serve only as an overall guideline in planning future infrastructure needs. In their simplest form, impact fees charge each unit of new growth for the net cost (total cost less credits) of infrastructure needed to serve that unit of growth. If the growth rates remain high, the County will have more impact fee revenues to fund growth related projects sooner rather than later. If the growth rate slows down, less revenue will be generated, and the timing and need for future infrastructure improvements will be later rather than sooner.



**Appendix A**  
**Population**  
**Supplemental Information**

## Appendix A: Population

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The fire rescue and EMS impact fee programs require the use of population data in calculating current levels of service, demand and credit calculations. With this in mind, a consistent approach to developing population estimates and projections is an important component of the data compilation process. To accurately determine demand for services, not only the residents, or permanent population in the county, but also the seasonal residents and visitors were considered. Seasonal residents include visitors and part-time residents, which are defined as living in Marion County for less than six months each year.

Therefore, for purposes of calculating future demand for capital facilities for each impact fee program area, the weighted seasonal population will be used in all population estimates and projections.

**Table A-1** presents the population trends for the countywide and fire rescue service area in Marion County. Projections indicate that the current countywide weighted seasonal population is approximately 434,400 and is estimated to increase to 512,000 (increase of 77,600) by 2040. The current weighted seasonal population for the fire rescue service area is approximately 362,800 and is estimated to increase to 427,700 (increase of 64,900) by 2040. The projected population growth rate averages 1.1 percent per year between 2025 and 2040.

**Table A-1  
Weighted Seasonal Population Projections**

Year	Countywide <sup>(1)</sup>	Fire Rescue Service Area <sup>(2)</sup>
2000	270,047	222,602
2001	275,057	227,338
2002	281,751	233,942
2003	290,262	242,222
2004	300,916	252,827
2005	313,218	262,963
2006	326,017	272,911
2007	336,501	280,912
2008	342,495	286,447
2009	344,739	288,356
2010	345,886	287,902
2011	347,900	289,414
2012	350,658	291,408
2013	353,946	294,142
2014	357,491	297,419
2015	362,097	301,014
2016	367,290	304,705
2017	372,098	309,399
2018	377,778	314,568
2019	384,790	316,767
2020	391,477	325,975
2021	396,949	330,846
2022	408,204	341,389
2023	420,682	352,419
2024	436,870	365,317
<b>2025</b>	<b>434,360</b>	<b>362,827</b>
2026	440,310	367,798
2027	446,343	372,837
2028	452,458	377,945
2029	458,656	383,122
2030	464,872	388,315
2031	469,893	392,508
2032	474,967	396,748
2033	480,098	401,033
2034	485,282	405,364
2035	490,595	409,802
2036	494,813	413,325
2037	499,068	416,880
2038	503,359	420,465
2039	507,688	424,080
2040	512,047	427,721

1) Source: Table A-13

2) Source: Table A-14

**Table A-2** and **A-3** present the population per housing unit (PPH) for the residential categories based on the permeant and weighted seasonal population. This analysis includes all housing units, both occupied and vacant.

**Table A-2  
Persons per Housing Unit by Housing Type (Countywide)**

Housing Type	Weighted Seasonal Population <sup>(1)</sup>	Housing Units <sup>(2)</sup>	Ratio <sup>(3)</sup>	Population / Housing Unit <sup>(4)</sup>
Single Family	294,207	128,129		2.30
- 1,500 sf or less			88%	2.02
- 1,501 to 2,499 sf			100%	2.30
- 2,500 sf and greater			110%	2.53
Multi-Family	33,034	19,772		1.67
Mobile Home	66,758	34,982		1.91
Senior Adult Housing – Detached <sup>(5)</sup>	176,524	128,129		1.38
Senior Adult Housing – Attached <sup>(6)</sup>	19,821	19,772		1.00

- 1) Source: 2023 American Community Survey (ACS) 5-Yr Estimates, Table B25033 (owner occupied and renter occupied), adjusted for peak seasonal population.
- 2) Source: 2023 American Community Survey (ACS); 5-Yr. Estimates, Table DP04
- 3) Ratios developed based on national PPH data derived from the 2023 American Housing Survey
- 4) Weighted seasonal population (Item 1) divided by housing units (Item 2)
- 5) Estimate for senior adult housing detached is based on people per household figures for single family homes, adjusted for the residents over 55 years of age based on information obtained from the 2017 National Household Travel Survey, prepared by the US Department of Transportation.
- 6) Estimate for senior adult housing-attached is based on people per household figures for multi-family homes, adjusted for the residents over 55 years of age based on information obtained from the 2017 National Household Travel Survey, prepared by the US Department of Transportation.

Notes: Excludes boats, RVs, vans, etc.

**Table A-3  
Persons per Housing Unit by Housing Type (Fire Rescue Service Area)**

Housing Type	Weighted Seasonal Population <sup>(1)</sup>	Housing Units <sup>(2)</sup>	Ratio <sup>(3)</sup>	Population / Housing Unit <sup>(4)</sup>
Single Family	253,222	111,798		2.26
- 1,500 sf or less			88%	1.99
- 1,501 to 2,499 sf			100%	2.26
- 2,500 sf and greater			110%	2.49
Multi-Family	12,838	8,520		1.51
Mobile Home	64,615	33,495		1.93
Senior Adult Housing – Detached <sup>(5)</sup>	151,933	111,798		1.36
Senior Adult Housing – Attached <sup>(6)</sup>	7,703	8,520		0.90

- 1) Source: 2023 American Community Survey (ACS) 5-Yr Estimates, Table B25033 (owner occupied and renter occupied), adjusted for peak seasonal population.
- 2) Source: 2023 American Community Survey (ACS); 5-Yr. Estimates, Table DP04
- 3) Ratios developed based on national PPH data derived from the 2023 American Housing Survey
- 4) Weighted seasonal population (Item 1) divided by housing units (Item 2)
- 5) Estimate for senior adult housing detached is based on people per household figures for single family homes, adjusted for the residents over 55 years of age based on information obtained from the 2017 National Household Travel Survey, prepared by the US Department of Transportation.
- 6) Estimate for senior adult housing-attached is based on people per household figures for multi-family homes, adjusted for the residents over 55 years of age based on information obtained from the 2017 National Household Travel Survey, prepared by the US Department of Transportation.

Notes: Excludes boats, RVs, vans, etc.

**Functional Population**

Functional population, as used in the impact fee analysis, is a generally accepted methodology for several impact fee areas and is based on the assumption that demand for certain facilities is generally proportional to the presence of people at a land use, including residents, employees, and visitors. It is not enough to simply add resident population to the number of employees, since the service demand characteristics can vary considerably by type of industry.

Functional population is the equivalent number of people occupying space within a community on a 24-hour-day, 7-days-a-week basis. A person living and working in the community will have the functional population coefficient of 1.0. A person living in the community but working elsewhere may spend only 16 hours per day in the community on weekdays and 24 hours per day on weekends for a functional population coefficient of 0.76 (128-hour presence divided by 168 hours in one week). A person commuting into the county to work five days per week would have a functional population coefficient of 0.30 (50-hour presence divided by 168 hours in one

week). Similarly, a person traveling into the community to shop at stores, perhaps averaging 8 hours per week, would have a functional population coefficient of 0.05.

Functional population thus tries to capture the presence of all people within the community, whether residents, workers, or visitors, to arrive at an estimate of effective population that needs to be served.

This form of adjusting population to help measure real facility needs replaces the population approach of merely weighting residents two-thirds and workers one-third (Nelson and Nicholas 1992)<sup>1</sup>. By estimating the functional and weighted population per unit of land use across all major land uses in a community, an estimate of the demand for certain facilities and services in the present and future years can be calculated. The following paragraphs explain how functional population is calculated for residential and non-residential land uses.

#### Residential Functional Population

Developing the residential component of functional population is simpler than developing the non-residential component. It is generally estimated that people spend one-half to three-fourths of their time at home and the rest of each 24-hour day away from their place of residence. In developing the functional population for residential categories, an analysis of Marion County's population and employment characteristics was conducted. **Tables A-4** and **A-5** present this analysis for the County. Based on this analysis, people in the county, on average, spend 16.8 hours each day at their place of residence. This corresponds to approximately 70 percent of each 24-hour day at their place of residence and the remaining 30 percent away from home.

It is important to note that these calculations were reviewed on a countywide basis as well as for the fire rescue service area. There was no significant difference between the estimated residential functional population coefficient. As such, the countywide figure is also utilized for the fire rescue service area.

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<sup>1</sup> Arthur C. Nelson and James C. Nicholas, "Estimating Functional Population for Facility Planning," *Journal of Urban Planning and Development* 118(2): 45-58 (1992)

**Table A-4  
Population & Employment Characteristics**

Variable	Year 2022
Total workers living countywide <sup>(1)</sup>	137,384
Total Population <sup>(2)</sup>	378,225
Total workers as a percent of population <sup>(3)</sup>	<b>36.3%</b>
School age population (5-17 years) <sup>(4)</sup>	52,625
School age population as a percent of population <sup>(5)</sup>	<b>13.9%</b>
Population net of workers and school age population <sup>(6)</sup>	188,216
Other population as a percent of total population <sup>(7)</sup>	<b>49.8%</b>

- 1) Source: Census OnTheMap 2022
- 2) Source: 2022 ACS 5-Yr Estimates, Table S0101
- 3) Total workers living countywide (Item 1) divided by total population (Item 2)
- 4) Source: 2022 ACS 5-Year Estimates, Table S0101
- 5) Total school age population (Item 4) divided by total population (Item 2)
- 6) Total population (Item 2) less total workers (Item 1) and school age population (Item 4)
- 7) Population net of workers and school age population (Item 6) divided by total population (Item 2)

**Table A-5  
Residential Coefficient for 24-Hour Functional Population**

Population Group	Hours at Residence <sup>(1)</sup>	Percent of Population <sup>(2)</sup>	Effective Hours <sup>(3)</sup>
Workers	13	36.3%	4.7
Students	15	13.9%	2.1
Other	20	49.8%	10.0
Total Hours at Residence <sup>(4)</sup>			16.8
<b>Residential Functional Population Coefficient <sup>(5)</sup></b>			<b>70.0%</b>

- 1) Estimated
- 2) Source: Table A-4
- 3) Hours at residence (Item 1) multiplied by the percent of population (Item 2)
- 4) Sum of effective hours
- 5) Sum of effective hours (Item 4) divided by 24

### Non-Residential Functional Population

Given the varying characteristics of non-residential land uses, developing the estimates of functional residents for non-residential land uses is more complicated than developing estimated functional residents for residential land uses. Nelson and Nicholas originally introduced a method for estimating functional resident population, which is now widely used in the industry. This method uses trip generation data from the Institute of Transportation Engineers' (ITE) Trip Generation Manual and Benesch's Trip Characteristics Database, information of passengers per vehicle, workers per vehicle, length of time spent at the land use, and other variables.

Specific calculations include:

- Total one-way trips per employee (ITE trips multiplied by 50 percent to avoid double counting entering and exiting trips as two trips).
- Visitors per impact unit based on occupants per vehicle (trips multiplied by occupants per vehicle less employees).
- Worker hours per week per impact unit (such as nine worker-hours per day multiplied by five days in a work week).
- Visitor hours per week per impact unit (visitors multiplied by number of hours per day times relevant days in a week, such as five for offices and seven for retail shopping).
- Functional population coefficients per employee developed by estimating time spent by employees and visitors at each land use.

**Table A-6** shows the functional population coefficients by land use/industry, which are used to estimate the 2025 countywide and fire rescue service area functional population in **Table A-7** and **Table A-8**.



**Table A-6  
General Functional Population Coefficients**

Population/Employment Category	ITE LUC	Employee Hours In-Place <sup>(1)</sup>	Trips per Employee <sup>(2)</sup>	One-Way Trips per Employee <sup>(3)</sup>	Journey-to-Work Occupants per Trip <sup>(4)</sup>	Daily Occupants per Trip <sup>(5)</sup>	Visitors per Employee <sup>(6)</sup>	Visitor Hours per Trip <sup>(1)</sup>	Days per Week <sup>(7)</sup>	Functional Population Coefficient <sup>(8)</sup>
Population									7.00	<b>0.700</b>
Natural Resources	N/A	9.00	3.10	1.55	1.32	1.38	0.09	1.00	7.00	<b>0.379</b>
Construction	110	9.00	3.10	1.55	1.32	1.38	0.09	1.00	5.00	<b>0.271</b>
Manufacturing	140	9.00	2.51	1.26	1.32	1.38	0.08	1.00	5.00	<b>0.270</b>
Transportation, Communication, Utilities	110	9.00	3.10	1.55	1.32	1.38	0.09	1.00	5.00	<b>0.271</b>
Wholesale Trade	150	9.00	5.05	2.53	1.32	1.38	0.15	1.00	5.00	<b>0.272</b>
Retail Trade	820	9.00	57.30	28.65	1.24	1.73	14.04	1.50	7.00	<b>1.252</b>
Finance, Insurance, Real Estate	710	9.00	3.33	1.67	1.24	1.73	0.82	1.00	5.00	<b>0.292</b>
Services <sup>(9)</sup>	N/A	9.00	20.32	10.16	1.24	1.73	4.98	1.00	6.00	<b>0.499</b>
Government <sup>(10)</sup>	730	9.00	7.45	3.73	1.24	1.73	1.83	1.00	7.00	<b>0.451</b>

(1) Estimated

(2) Trips per employee represents all trips divided by the number of employees and is based on Trip Generation 11th Edition (Institute of Transportation Engineers 2021) as follows:

- ITE Code 110 at 3.10 weekday trips per employee, Volume 2 - Industrial Land Uses, page 39
- ITE Code 140 at 2.51 weekday trips per employee, Volume 2 - Industrial Land Uses, page 76
- ITE Code 150 at 5.05 weekday trips per employee, Volume 2 - Industrial Land Uses, page 104
- ITE Code 710 at 3.33 weekday trips per employee, Volume 2 Office Land Uses, page 716
- ITE Code 730 at 7.45 weekday trips per employee, Volume 2 Office Land Uses, page 795

ITE Code 820 (page 186) based on blended average of trips by retail center size calculated below.

Trips per retail employee from the following table:

<i>Retail Scale</i>	<i>Trip Rate</i>	<i>Sq Ft per Employee<sup>(11)</sup></i>	<i>Trips per Employee</i>	<i>Share</i>	<i>Weighted Trips</i>
Retail (Less than 40k sq. ft.)	54.45	890	48	50.0%	24.00
Retail (40k to 150k sq. ft.)	67.52	1,152	78	35.0%	27.30
Retail (greater than 150k sq. ft.)	37.01	1,070	40	15.0%	<u>6.00</u>
Sum of Weighted Trips/1k sq.ft.					57.30

(3) Trip per employee (Item 2) multiplied by 0.5.

(4) Journey-to-Work Occupants per Trip from 2001 National Household Travel Survey (FHWA 2001) as follows:

- 1.32 occupants per Construction, Manufacturing, TCU, and Wholesale trip
- 1.24 occupants per Retail Trade, FIRE, and Services trip

(5) Daily Occupants per Trip from 2001 National Household Travel Survey (FHWA 2001) as follows:

- 1.38 occupants per Construction, Manufacturing, TCU, and Wholesale trip
- 1.73 occupants per Retail Trade, FIRE, and Services trip

(6) [Daily occupants per trip (Item 5) multiplied by one-way trips per employee (Item 3)] - [(Journey-to-Work occupants per trip (Item 4) multiplied by one-way trips per employee (Item 3))

(7) Typical number of days per week that indicated industries provide services and relevant government services are available.

(8) Table A-11 for residential and the equation below to determine the Functional Population Coefficient per Employee for all land-use categories except residential includes the following:

$$\frac{((\text{Days per Week} \times \text{Employee Hours in Place}) + (\text{Visitors per Employee} \times \text{Visitor Hours per Trip} \times \text{Days per Week}))}{(24 \text{ Hours per Day} \times 7 \text{ Days per Week})}$$

(9) Trips per employee for the services category is the average trips per employee for the following service related land use categories: quality restaurant, high-turnover restaurant, supermarket, hotel, motel, elementary school, middle school, high school, hospital, medical office, and church. Source for the trips per employee figure from ITE, 11th ed., when available.

(10) Includes Federal Civilian Government, Federal Military Government, and State and Local Government categories.

(11) Square feet per retail employee from the Energy Information Administration from Table B-1 of the Commercial Energy Building Survey, 2018

**Table A-7  
Functional Population (Countywide)**

<b>Population Category</b>	<b>Countywide Baseline Data<sup>(1)</sup></b>	<b>Functional Population Coefficient<sup>(2)</sup></b>	<b>Countywide Functional Population<sup>(3)</sup></b>
2025 Weighted Population	434,360	0.700	304,052
<b><i>Employment Category</i></b>			
Natural Resources	6,411	0.379	2,430
Construction	13,641	0.271	3,697
Manufacturing	10,790	0.270	2,913
Transportation, Communication, and Utilities	14,193	0.271	3,846
Wholesale Trade	5,550	0.272	1,510
Retail Trade	22,179	1.252	27,768
Finance, Insurance, and Real Estate	20,109	0.292	5,872
Services	79,587	0.499	39,714
Government Services	15,721	0.451	<u>7,090</u>
<b>Total Employment by Category Population<sup>(4)</sup></b>			<b>94,840</b>
<b>2025 Total Functional Population<sup>(5)</sup></b>			<b>398,892</b>

- 1) Source: Table A-1 for population. Employment data is 2024 Woods & Poole (2025 estimates).
- 2) Source: Table A-6
- 3) Functional population is calculated by multiplying the countywide baseline data (Item 1) by the functional population coefficient (Item 2)
- 4) The total employment population by category is the sum of the employment figures from the nine employment categories (e.g., natural resources, construction, etc.)
- 5) The total functional population is the sum of the residential functional population and the employment functional population.

**Table A-8  
Functional Population (Fire Rescue Service Area)**

<b>Population Category</b>	<b>Fire Rescue Service Area Data<sup>(1)</sup></b>	<b>Functional Population Coefficient<sup>(2)</sup></b>	<b>Fire Rescue Functional Population<sup>(3)</sup></b>
2025 Weighted Population	362,827	0.700	253,979
<b><i>Employment Category</i></b>			
Natural Resources	5,539	0.379	2,099
Construction	8,921	0.271	2,418
Manufacturing	3,043	0.270	822
Transportation, Communication, and Utilities	7,097	0.271	1,923
Wholesale Trade	2,348	0.272	639
Retail Trade	10,291	1.252	12,884
Finance, Insurance, and Real Estate	8,406	0.292	2,455
Services	24,911	0.499	12,431
Government Services	770	0.451	<u>347</u>
<b>Total Employment by Category Population<sup>(4)</sup></b>			<b>36,018</b>
<b>2025 Total Functional Population<sup>(5)</sup></b>			<b>289,997</b>

- 1) Source: Table A-1 for population. Employment data is 2024 Woods & Poole (2025 estimates) adjusted by the industry distribution in the fire rescue service area from Census OnTheMap 2022
- 2) Source: Table A-6
- 3) Functional population is calculated by multiplying the service area baseline data (Item 1) by the functional population coefficient (Item 2)
- 4) The total employment population by category is the sum of the employment figures from the nine employment categories (e.g., natural resources, construction, etc.)
- 5) The total functional population is the sum of the residential functional population and the employment functional population.

**Table A-9** presents the annual functional population figures from 2000 through 2040, based on the 2025 functional population figures from Tables A-7 and A-8 and the annual population growth rates from the population figures previously presented in Table A-1.

**Table A-9  
Functional Population (2000 – 2040)**

Year	Countywide	Fire Rescue Service Area
2000	248,167	178,206
2001	252,882	181,948
2002	258,951	187,224
2003	266,720	193,777
2004	276,589	202,303
2005	287,929	210,395
2006	299,734	218,390
2007	309,325	224,723
2008	314,893	229,217
2009	317,097	230,822
2010	318,048	230,360
2011	319,956	231,512
2012	322,516	233,133
2013	325,419	235,231
2014	328,673	237,819
2015	332,946	240,673
2016	337,607	243,561
2017	341,996	247,214
2018	347,126	251,417
2019	353,721	253,177
2020	359,734	260,519
2021	364,770	264,427
2022	374,984	272,889
2023	386,609	281,621
2024	401,300	292,041
<b>2025</b>	<b>398,892</b>	<b>289,997</b>
2026	404,476	294,057
2027	410,139	298,174
2028	415,881	302,348
2029	421,703	306,581
2030	427,607	310,873
2031	432,311	314,293
2032	437,066	317,750
2033	441,874	321,245
2034	446,735	324,779
2035	451,649	328,352
2036	455,714	331,307
2037	459,815	334,289
2038	463,953	337,298
2039	468,129	340,334
2040	472,342	343,397

Source: Tables A-7 and A-8 for 2025. Remaining years are based on growth rates of the weighted seasonal population; Table A-1

### Functional Residents by Specific Land Use Category

When a wide range of land uses impact services, an estimate of that impact is needed for each land use. This section presents functional residents per unit estimates by residential and non-residential land uses.

#### *Residential and Transient Land Uses*

As mentioned previously, different functional population coefficients need to be developed for each land use category to be analyzed. For residential and transient land uses, these coefficients are displayed in **Tables A-10** and **A-11**. The average number of persons per housing unit was calculated for single family homes by size of home, multi-family, and mobile home land uses separately. Besides the residential land uses, Table A-8 also includes transient land uses, such as hotels, motels, and nursing homes. Secondary sources, such as Ocala/Marion County Visitor and Convention Bureau and the Florida Department of Elderly Affairs, are used to determine the occupancy rate for hotels, motels, and nursing home.

#### *Non-Residential Land Uses*

A similar approach is used to estimate functional residents for non-residential land uses. **Table A-12** presents basic assumptions and calculations, such as trips per unit, trips per employee, employees per impact unit, one-way trips per impact unit, worker hours, occupants per vehicle trip, visitors (patrons, etc.) per impact unit, visitor hours per trip, and days per week for non-residential land uses. The final column in the table shows the estimated functional residents per unit by land use. These coefficients by land use measure the demand component for the fire rescue and EMS impact fee programs and will be used in the calculation of the impact fee per unit for each land use category in the related impact fee schedules.

**Table A-10  
Functional Residents for Residential and Transient Land Uses (Countywide)**

Land Use	Impact Unit	ITE LUC <sup>(1)</sup>	Residents/ Visitors Per Unit <sup>(2)</sup>	Occupancy Rate <sup>(3)</sup>	Adjusted Residents Per Unit <sup>(4)</sup>	Visitor Hours at Place <sup>(5)</sup>	Workers Per Unit <sup>(6)</sup>	Work Day Hours <sup>(7)</sup>	Days Per Week <sup>(8)</sup>	Functional Residents per Unit <sup>(9)</sup>
<b>Residential:</b>										
Single Family										
- 1,500 sf or less	du	210	2.02	-	-	-	-	-	-	1.41
- 1,501 to 2,499 sf	du		2.30	-	-	-	-	-	-	1.61
- 2,500 sf and greater	du		2.53	-	-	-	-	-	-	1.77
Multi-Family	du	220/221/222	1.67	-	-	-	-	-	-	1.17
Mobile Home	du	240	1.91	-	-	-	-	-	-	1.34
Senior Adult Housing - Detached	du	251	1.38	-	-	-	-	-	-	0.97
Senior Adult Housing – Attached	du	252	1.00	-	-	-	-	-	-	0.70
<b>Transient, Assisted, Group:</b>										
Congregate/Assisted Care Facility	du	253	1.00	82%	0.82	20	0.56	9	7	0.89
Hotel	room	310	3.10	63%	1.95	12	0.56	9	7	1.19
Motel	room	320	3.10	63%	1.95	12	0.13	9	7	1.02
Nursing Home	bed	620	1.00	82%	0.82	20	0.92	9	7	1.03
<p>(1) Land use code from the Institute of Transportation Engineers (ITE) Trip Generation Handbook, 11th Edition</p> <p>(2) Estimates for the residential land uses from Table A-2; estimate for congregate/assisted care facility based on people per household figures for multi-family homes, adjusted for the residents over 55 years of age based on information obtained from the 2017 National Household Travel Survey, prepared by the US Department of Transportation; estimate for the hotel and motel land uses based on information from the Ocala, Marion County Florida Visitors &amp; Convention Bureau (2024); nursing home estimate based on 1 person per bed.</p> <p>(3) Estimate for congregate/assisted care facility and nursing home is the average occupancy (2021-2024) for skilled nursing facilities from the Department of Elder Affairs; estimate for hotel/motel occupancy is average occupancy rate (2023-2024) from Ocala, Marion County Florida Visitors &amp; Convention Bureau;</p> <p>(4) Visitors per unit (Item 2) multiplied by occupancy rate (Item 3)</p> <p>(5), (7), (8) Estimated</p> <p>(6) Adapted from ITE Trip Generation Handbook, 11th Edition</p> <p>(9) For residential land uses, calculated as residents per unit times the functional population coefficient (0.700 from Table A-4). For transient, assisted, and group land uses, calculated as <math>[(\text{Adjusted Residents per Unit} \times \text{Hours at Place} \times \text{Days per Week}) + (\text{Workers Per Unit} \times \text{Work Hours Per Day} \times \text{Days per Week})]</math></p> <p align="center">(24 Hours per Day X 7 Days per Week)</p>										

**Table A-11  
Functional Residents per Unit for Residential and Transient Land Uses (Fire Rescue Service Area)**

Land Use	Impact Unit	ITE LUC <sup>(1)</sup>	Residents/ Visitors Per Unit <sup>(2)</sup>	Occupancy Rate <sup>(3)</sup>	Adjusted Residents Per Unit <sup>(4)</sup>	Visitor Hours at Place <sup>(5)</sup>	Workers Per Unit <sup>(6)</sup>	Work Day Hours <sup>(7)</sup>	Days Per Week <sup>(8)</sup>	Functional Residents per Unit <sup>(9)</sup>
<b>Residential:</b>										
Single Family										
- 1,500 sf or less	du	210	1.99	-	-	-	-	-	-	1.39
- 1,501 to 2,499 sf	du		2.26	-	-	-	-	-	-	1.58
- 2,500 sf and greater	du		2.49	-	-	-	-	-	-	1.74
Multi-Family	du	220/221/222	1.51	-	-	-	-	-	-	1.06
Mobile Home	du	240	1.93	-	-	-	-	-	-	1.35
Senior Adult Housing - Detached	du	251	1.36	-	-	-	-	-	-	0.95
Senior Adult Housing – Attached	du	252	0.90	-	-	-	-	-	-	0.63
<b>Transient, Assisted, Group:</b>										
Congregate/Assisted Care Facility	du	253	0.90	82%	0.74	20	0.56	9	7	0.83
Hotel	room	310	3.10	63%	1.95	12	0.56	9	7	1.19
Motel	room	320	3.10	63%	1.95	12	0.13	9	7	1.02
Nursing Home	bed	620	1.00	82%	0.82	20	0.92	9	7	1.03
<p>(1) Land use code from the Institute of Transportation Engineers (ITE) Trip Generation Handbook, 11th Edition</p> <p>(2) Estimates for the residential land uses from Table A-2; estimate for congregate/assisted care facility based on people per household figures for multi-family homes, adjusted for the residents over 55 years of age based on information obtained from the 2017 National Household Travel Survey, prepared by the US Department of Transportation; estimate for the hotel and motel land uses based on information from the Ocala, Marion County Florida Visitors &amp; Convention Bureau (2024); nursing home estimate based on 1 person per bed.</p> <p>(3) Estimate for congregate/assisted care facility and nursing home is the average occupancy (2021-2024) for skilled nursing facilities from the Department of Elder Affairs; estimate for hotel/motel occupancy is average occupancy rate (2023-2024) from Ocala, Marion County Florida Visitors &amp; Convention Bureau;</p> <p>(4) Visitors per unit (Item 2) multiplied by occupancy rate (Item 3)</p> <p>(5), (7), (8) Estimated</p> <p>(6) Adapted from ITE Trip Generation Handbook, 11th Edition</p> <p>(9) For residential land uses, calculated as residents per unit times the functional population coefficient (0.700 from Table A-4). For transient, assisted, and group land uses, calculated as <math>\frac{[(\text{Adjusted Residents per Unit} \times \text{Hours at Place} \times \text{Days per Week}) + (\text{Workers Per Unit} \times \text{Work Hours Per Day} \times \text{Days per Week})]}{(24 \text{ Hours per Day} \times 7 \text{ Days per Week})}</math></p>										

**Table A-12  
Functional Residents per Unit for Non-Residential Land Uses**

ITE LUC <sup>(1)</sup>	Land Use	Impact Unit	Trips Per Unit <sup>(2)</sup>	Trips Per Employee <sup>(3)</sup>	Employees Per Unit <sup>(4)</sup>	One-Way Factor @ 50% <sup>(5)</sup>	Worker Hours <sup>(6)</sup>	Occupants Per Trip <sup>(7)</sup>	Visitors <sup>(8)</sup>	Visitor Hours Per Trip <sup>(9)</sup>	Days Per Week <sup>(10)</sup>	Functional Residents per Unit <sup>(11)</sup>
<b>RECREATIONAL:</b>												
411	Public Park	acre	0.78	59.53	0.01	0.39	9	1.64	0.63	1.50	7	0.04
416	RV Park/Campground	site	1.62	N/A	1.20	0.81	9	1.64	0.13	1.50	7	0.46
420	Marina	berth	2.41	20.52	0.12	1.21	9	1.64	1.86	1.00	7	0.12
430	Golf Course	hole	30.38	20.52	1.48	15.19	9	1.64	23.43	0.25	7	0.80
445	Movie Theater	screen	114.83	53.12	2.16	57.42	9	1.64	92.01	1.00	7	4.64
492	Racquet Club/Health Spa	1,000 sf	34.50	N/A	1.06	17.25	9	1.64	27.23	1.50	7	2.10
495	Recreational Community Center	1,000 sf	28.82	27.25	1.06	14.41	9	1.64	22.57	1.50	7	1.81
<b>INSTITUTIONAL:</b>												
520	Elementary School (Private)	student	2.27	22.50	0.10	1.14	9	1.11	1.17	2.00	5	0.10
522	Middle School (Private)	student	2.10	23.41	0.09	1.05	9	1.11	1.08	2.00	5	0.09
525	High School (Private)	student	1.94	21.95	0.09	0.97	9	1.11	0.99	2.00	5	0.08
540	University/Junior College (7,500 or fewer students) (Private)	student	2.00	11.75	0.17	1.00	9	1.11	0.94	2.00	5	0.10
550	University/Junior College (more than 7,500 students) (Private)	student	1.50	11.75	0.13	0.75	9	1.11	0.70	2.00	5	0.08
560	Church	1,000 sf	7.60	20.64	0.37	3.80	9	2.16	7.84	1.00	7	0.47
565	Day Care Center	1,000 sf	49.63	21.38	2.32	24.82	9	2.16	51.29	0.15	5	0.85
590	Library	1,000 sf	72.05	55.64	1.29	36.03	9	1.08	37.62	1.00	7	2.05
<b>MEDICAL:</b>												
610	Hospital	1,000 sf	10.77	3.77	2.86	5.39	9	1.44	4.90	1.00	7	1.28
640	Animal Hospital/Veterinary Clinic	1,000 sf	24.20	12.69	1.91	12.10	9	1.44	15.51	1.00	7	1.36
<b>OFFICE:</b>												
710	Office	1,000 sf	10.84	3.33	3.26	5.42	9	1.09	2.65	1.00	5	0.95
720	Medical Office/Clinic	1,000 sf	23.83	8.71	2.74	11.92	9	1.44	14.42	1.00	5	1.16
770	Business Park	1,000 sf	12.65	4.04	3.13	6.33	9	1.09	3.77	0.75	5	0.92
<b>RETAIL:</b>												
822	Retail 6,000 sf gla or less	1,000 sf gla	54.45	17.42	3.13	27.23	9	1.52	38.26	0.50	7	1.97
822	Retail 6,001 to 40,000 sf gla	1,000 sf gla	54.45	17.42	3.13	27.23	9	1.52	38.26	0.50	7	1.97
821	Retail 40,001 to 150,000 sf gla	1,000 sf gla	67.52	17.42	3.88	33.76	9	1.52	47.44	0.65	7	2.74
820	Retail greater than 150,000 sf gla	1,000 sf gla	37.01	17.42	2.12	18.51	9	1.52	26.02	1.00	7	1.88
840/841	New/Used Auto Sales	1,000 sf	24.58	11.84	2.08	12.29	9	1.52	16.60	1.00	7	1.47
850	Supermarket	1,000 sf	94.48	43.86	2.15	47.24	9	1.52	69.65	0.50	7	2.26
862	Home Improvement Superstore	1,000 sf	30.74	n/a	2.50	15.37	9	1.52	20.86	1.00	7	1.81
880/881	Pharmacy/Drug Store with or w/o Drive-Thru	1,000 sf	103.86	69.17	1.50	51.93	9	1.52	77.43	0.35	7	1.69
890	Furniture Store	1,000 sf	6.30	10.93	0.58	3.15	9	1.52	4.21	0.50	7	0.31
<b>SERVICES:</b>												
911	Bank/Savings Walk-In	1,000 sf	57.94	32.73	1.77	28.97	9	1.52	42.26	0.35	6	1.10
912	Bank/Savings Drive-In	1,000 sf	103.73	32.73	3.17	51.87	9	1.52	75.67	0.15	6	1.42



**Table A-12 (Continued)**  
**Functional Residents per Unit for Non-Residential Land Uses**

ITE LUC <sup>(1)</sup>	Land Use	Impact Unit	Trips Per Unit <sup>(2)</sup>	Trips Per Employee <sup>(3)</sup>	Employees Per Unit <sup>(4)</sup>	One-Way Factor @ 50% <sup>(5)</sup>	Worker Hours <sup>(6)</sup>	Occupants Per Trip <sup>(7)</sup>	Visitors <sup>(8)</sup>	Visitor Hours Per Trip <sup>(9)</sup>	Days Per Week <sup>(10)</sup>	Functional Residents per Unit <sup>(11)</sup>
<b>SERVICES:</b>												
931	Restaurant	1,000 sf	86.03	17.90	4.81	43.02	9	2.30	94.14	1.00	7	5.73
n/a	Small Local Restaurant	1,000 sf	86.03	17.90	4.81	43.02	9	2.30	94.14	1.00	6	4.91
941	Quick Lube	service bay	40.00	16.00	2.50	20.00	9	1.52	27.90	0.50	7	1.52
942	Automobile Care Center	1,000 sf	28.19	14.30	1.97	14.10	9	1.52	19.46	1.00	7	1.55
944	Gas Station w/Convenience Store <2,000 sq ft	fuel pos.	172.01	275.78	0.62	86.01	9	1.52	130.12	0.20	7	1.32
945	Gas Station w/Convenience Store 2,000 to 5,499 sq ft	fuel pos.	264.38	241.21	1.10	132.19	9	1.52	199.83	0.20	7	2.08
	Gas Station w/Convenience Store 5,500+ sq ft	fuel pos.	345.75	241.21	1.43	172.88	9	1.52	261.35	0.20	7	2.71
947	Self-Service Car Wash	service bay	43.94	N/A	0.50	21.97	9	1.52	32.89	0.50	7	0.87
948	Automated Car Wash	car tunnel	775.00	n/a	9.55	387.50	9	1.52	579.45	0.25	7	9.62
<b>INDUSTRIAL:</b>												
110	General Light Industrial	1,000 sf	4.87	3.10	1.57	2.44	9	1.08	1.07	1.00	5	0.45
140	Manufacturing	1,000 sf	4.75	2.51	1.89	2.38	9	1.08	0.68	1.00	5	0.53
150	Warehousing	1,000 sf	1.71	5.05	0.34	0.86	9	1.08	0.59	0.75	5	0.10
151	Mini-Warehouse	1,000 sf	1.46	61.90	0.02	0.73	9	1.08	0.77	0.75	7	0.03
154	High-Cube Transload and Short-Term Warehouse	1,000 sf	1.40	2.77	0.51	0.70	9	1.08	0.25	0.75	5	0.14

Sources:

- 1) Land use code found in the Institute of Transportation Engineers (ITE) Trip Generation Handbook, 11th Edition
- 2) Land uses and trip generation rates consistent with those included in the 2025 Transportation Impact Fee Update Study
- 3) Trips per employee from ITE Trip Generation Handbook, 11th Edition, when available
- 4) Trips per unit (Item 2) divided by trips per person (usually employee). When trips per person are not available, the employees per unit is estimated
- 5) Trips per unit (Item 2) multiplied by 50 percent
- 6) Estimated
- 7) 2022 National Household Travel Survey (FHWA 2022) for all land uses except for educational land uses (elementary, middle, high, and universities). Educational land uses use 2001 National Household Travel Survey (FHWA 2001).
- 8) [(One-way Trips/Unit X Occupants/Trip) - Employees]
- 9) Estimated
- 10) Estimated
- 11) [(Workers X Hours/Day X Days/Week) + (Visitors X Hours/Visit X Days/Week)]/(24 Hours x 7 Days)

**Table A-13  
Weighted Seasonal Population Projections (Countywide)**

Year	Permanent Population <sup>(1)</sup>	Seasonal Population <sup>(2)</sup>	Total Weighted Season Population <sup>(3)</sup>
2000	258,916	11,131	270,047
2001	263,702	11,355	275,057
2002	270,120	11,631	281,751
2003	278,279	11,983	290,262
2004	288,494	12,422	300,916
2005	300,288	12,930	313,218
2006	312,558	13,459	326,017
2007	322,610	13,891	336,501
2008	328,356	14,139	342,495
2009	330,507	14,232	344,739
2010	331,303	14,583	345,886
2011	333,269	14,631	347,900
2012	335,911	14,747	350,658
2013	339,061	14,885	353,946
2014	342,457	15,034	357,491
2015	346,869	15,228	362,097
2016	351,844	15,446	367,290
2017	356,450	15,648	372,098
2018	361,891	15,887	377,778
2019	368,608	16,182	384,790
2020	375,908	15,569	391,477
2021	381,176	15,773	396,949
2022	391,983	16,221	408,204
2023	403,966	16,716	420,682
2024	419,510	17,360	436,870
<b>2025</b>	<b>417,100</b>	<b>17,260</b>	<b>434,360</b>
2026	422,814	17,496	440,310
2027	428,607	17,736	446,343
2028	434,479	17,979	452,458
2029	440,431	18,225	458,656
2030	446,400	18,472	464,872
2031	451,221	18,672	469,893
2032	456,094	18,873	474,967
2033	461,020	19,078	480,098
2034	465,999	19,283	485,282
2035	471,100	19,495	490,595
2036	475,151	19,662	494,813
2037	479,237	19,831	499,068
2038	483,358	20,001	503,359
2039	487,515	20,173	507,688
2040	491,700	20,347	512,047

- 1) Source: 2000 through 2024 is the U.S. Census and the Bureau of Economic and Business Research (BEBR). For 2025 through 2040 BEBR, Volume 57, Bulletin 198, January 2024 (Medium-Level Projections). Interim years were interpolated.
- 2) Seasonal population is sum of the seasonal/occasional/recreational population and hotel/motel visitors. Seasonal residents are weighed by 0.42 to account for a portion of the year (assume 5 months; 5 months divided by 12 months = 0.42). Hotel/motel visitation is estimated based on data from Ocala/Marion County Visitor and Convention Bureau.
- 3) Sum of permanent population (Item 1) and seasonal population (Item 2)

**Table A-14**  
**Weighted Seasonal Population Projections (Fire Rescue Service Area)**

Year	Permanent Population <sup>(1)</sup>	Seasonal Population <sup>(2)</sup>	Total Weighted Season Population <sup>(3)</sup>
2000	212,973	9,629	222,602
2001	217,515	9,823	227,338
2002	223,834	10,108	233,942
2003	231,756	10,466	242,222
2004	241,902	10,925	252,827
2005	251,601	11,362	262,963
2006	261,119	11,792	272,911
2007	268,775	12,137	280,912
2008	274,070	12,377	286,447
2009	275,897	12,459	288,356
2010	274,988	12,914	287,902
2011	276,464	12,950	289,414
2012	278,369	13,039	291,408
2013	280,980	13,162	294,142
2014	284,111	13,308	297,419
2015	287,545	13,469	301,014
2016	291,071	13,634	304,705
2017	295,555	13,844	309,399
2018	300,493	14,075	314,568
2019	302,593	14,174	316,767
2020	312,317	13,658	325,975
2021	316,933	13,913	330,846
2022	327,032	14,357	341,389
2023	337,598	14,821	352,419
2024	349,954	15,363	365,317
<b>2025</b>	<b>347,569</b>	<b>15,258</b>	<b>362,827</b>
2026	352,331	15,467	367,798
2027	357,158	15,679	372,837
2028	362,051	15,894	377,945
2029	367,011	16,111	383,122
2030	371,985	16,330	388,315
2031	376,002	16,506	392,508
2032	380,063	16,685	396,748
2033	384,168	16,865	401,033
2034	388,317	17,047	405,364
2035	392,568	17,234	409,802
2036	395,943	17,382	413,325
2037	399,348	17,532	416,880
2038	402,782	17,683	420,465
2039	406,246	17,834	424,080
2040	409,734	17,987	427,721

- 1) Source: 2000 through 2024 is the U.S. Census and the Bureau of Economic and Business Research (BEBR). For 2025 through 2040 BEBR, Volume 57, Bulletin 198, January 2024 (Medium-Level Projections) adjusted by the average ratio (2020-2024) of the fire rescue service area to countywide population. Interim years were interpolated.
- 2) Seasonal population is sum of the seasonal/occasional/recreational population and hotel/motel visitors. Seasonal residents are weighed by 0.42 to account for a portion of the year (assume 5 months; 5 months divided by 12 months = 0.42). Hotel/motel visitation is estimated based on data from Ocala/Marion County Visitor and Convention Bureau.
- 3) Sum of permanent population (Item 1) and seasonal population (Item 2)

**Appendix B**  
**Building and Land Value Analysis**  
**Supplemental Information**

## Appendix B: Building and Land Value Analysis

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This appendix provides a summary of building and land value estimates for fire rescue and EMS facilities.

### ***Building Values***

In determining the appropriate unit cost for building construction, the following analyses were conducted:

- Cost increases since the last study;
- Recent construction and/or cost estimates for future facilities;
- Insurance values of existing facilities;
- Data from other jurisdictions; and
- Discussions with the County.

The 2005 study used an estimated building value of \$175 per square foot. Indexing this value to current dollars based on the Engineering News Records (ENR) Building Cost Index results in \$350 per square foot.

The County recently built one station and has plans to build/rebuild three other stations within the next five years. The construction cost is estimated to range from \$430 to \$650 per square foot.

Insurance values of existing buildings averaged \$155 per square foot for career stations, \$95 per square foot for volunteer stations, and \$150 per square foot for office space. It should be noted that insurance values are considered conservative estimates because insurance companies exclude the value of the foundation and other more permanent parts of the structure that would not have to be rebuilt if the structure was damaged.

Benesch obtained cost information from several jurisdictions to supplement the local data. The bids and estimates received between 2021 and 2024 ranged from \$300 to \$550 per square foot, averaging approximately \$440 per square foot.

Given this information, an average value of \$500 per square foot was used for career stations, \$300 per square foot for volunteer stations, and \$375 per square foot for office space and the main operations building.

### ***Land Values***

To determine land values, the following data/information was evaluated:

- Recent land purchases and appraisals/estimates for upcoming purchases for the related infrastructure;
- Land value of current inventory as reported by the Marion County Property Appraiser (MCPA);
- Vacant land sales between 2018 and 2023 by size and by land use;
- Value of vacant land by size and by land use; and
- Discussions with the County.

The County recently purchased a 3.17-acre site for \$40,400 per acre. The purchase price was less than the appraised value as the County agreed to reconstruct a portion of NE 146<sup>th</sup> Place. The County also recently purchased a site for \$62,000 per acre. Discussions with the County indicate that future land purchases are estimated to vary from \$60,000 per acre to \$150,000 per acre.

The value of current parcels as reported by the Property Appraiser averages \$27,100 per acre with a range of \$3,400 per acre to \$435,600 per acre. Property Appraiser land value estimates for governmental entities tend to be on the low end since these properties are not subject to property tax and the values are not always updated to reflect the market conditions.

Vacant land sales of similarly sized parcels (from 0.5 acres to 5 acres) countywide between 2018 and 2023 averaged \$45,100 per acre with a median value of \$23,700 per acre. These prices are higher for commercial properties, with an average of \$163,800 per acre and a median value of \$80,700 per acre. Within the fire rescue service area, vacant land sales for all land uses averaged \$39,400 per acre with a median value of \$22,800 per acre. For commercial properties within the fire rescue service area, vacant land sales averaged \$127,800 per acre with a median of \$66,700 per acre.

Similarly, the value of vacant land estimated by the Property Appraiser countywide averaged \$28,900 per acre with a median value of \$19,900 per acre for all vacant properties. For

commercial properties, the average value is estimated at \$95,800 per acre with a median value of \$65,300 per acre. Within the fire rescue service area, vacant land values averaged \$26,200 per acre for all properties and \$80,300 per acre for commercial properties.

Given this information, an average land value of \$65,000 per acre is determined to be a reasonable estimate for fire rescue and EMS impact fee calculation purposes.



# Marion County

## Board of County Commissioners Workshop

### Agenda Item

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**File No.:** 2025-18468

**Agenda Date:** 3/13/2025

**Agenda No.:** 3.

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**SUBJECT:**  
Fort King Discussion

**INITIATOR:**  
Craig Curry, County Commissioner

**DEPARTMENT:**  
District 1

**DESCRIPTION/BACKGROUND:**  
Craig Curry, County Commissioner, discussion regarding Fort King Park and the Fort King Foundation.

**BUDGET/IMPACT:**  
None.

**RECOMMENDED ACTION:**  
For discussion.





# Marion County

## Board of County Commissioners Workshop

### Agenda Item

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**File No.:** 2025-18470

**Agenda Date:** 3/13/2025

**Agenda No.:** 4.

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**SUBJECT:**

**Other Topics for Discussion from Board / Council Members**

**INITIATOR:**

**Mounir Bouyounes, P.E., County  
Administrator**

**DEPARTMENT:**

**Administration**

**DESCRIPTION/BACKGROUND:**

Other topics for discussion from Board / Council Members.

**BUDGET/IMPACT:**

None.

**RECOMMENDED ACTION:**

For discussion.