System Development Charge Calculator Version 1.0



User's Manual

September 2006

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Developed with funding support from the Midwest Technical Assistance Center

The Environmental Finance Center at Boise State University has produced this Microsoft Excel based workbook designed to help small public water systems calculate system development charges. The System Development Charge Calculator can generate system development charges on an equivalent dwelling unit (EDU) basis or based on service meter size.

Water system officials have the options of using two conservative and transparent calculation methods — Growth Method or Equity Buy In Method (or both) — to determine how much new development should pay to connect to the existing water system. These calculations can lead to the implementation of a local policy that recognizes the principal that new growth should pay its fair share for connecting to the existing system.

The System Development Calculator uses water system inventory information developed from the EFC's CAPFinance model, our asset inventory and financial planning model.

Introduction

Small water systems that are experiencing pressures from an increase of residential, commercial, industrial and other potential users need the ability to determine what the cost impacts are from growth in the customer base. Calculating the impact of growth is important when deciding how the **costs of growth** on the existing water supply system are going to be paid. Deciding **who** is going to pay for those costs is a function of public policy as well as a function of public finance. Having access to a tool that produces the financial calculations relative to the costs of growth will help community leaders make better policy and water system financing decisions.

The **System Development Charge Calculator** answers several of the "how to pay" questions regarding the impact of growth on public water supply systems. The model produces information about connection expenses based on either meter size or equivalent residential unit. Users can choose either of two conservative methods for determining system development charges — the **growth related method** or the **equity buy in method**. Skilled users of the **Calculator** may choose to incorporate both techniques in fashioning specific charges relative to providing water services to growth areas.

The Environmental Finance Center at Boise State University is grateful for the programmatic and financial support of the Midwest Technical Assistance Center at the University of Illinois for making this new software tool possible.

All questions related to the use of the **System Development Charge Calculator** model and the background on how the methodologies were developed should be directed to Bill Jarocki at (208) 426-1567 or bjarock@boisestate.edu.



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A Cautionary Note:

To Users of the System Development Charge Calculator

Creating a software model that will be universally applicable to communities and the variety of public water systems throughout the Midwest is a difficult endeavor. Often specific restrictions on the use of system development charges have been established by state statute or regulations and by local government ordinances and/or resolution.

Remember that charges seeking to recover the cost impact of growth have a variety of names; impact fees, connection charges, capital cost fees, etc.

It is important to seek the advice of the user's legal counsel regarding the water system's authority to establish and impose system development charges prior to any final decisions in using the results of this software model.



Getting Started

The **System Development Charge Calculator** is a Microsoft Excel workbook, created in Microsoft XP. To help streamline the text of the User's Manual we'll refer to the workbook as the **SDC2**. Familiarity with Microsoft Excel is necessary to effectively use the **SDC Calculator**. The workbook uses macros to assist users in navigating through the various input and report screens.

Here are some important steps to take in preparing to use the SDC2:

Step 1.

First make a copy of the **SDC2** file. Give it a unique name — such as "SDC2 Blank." Anytime you use the "blank" workbook, save your work with a unique file name. That way you'll always have the "blank" file to return to if you wish to start anew.

Step 2.

When you first use the workbook you may be asked to **Enable Macros** in order to proceed. Click on the tab titles "<u>Enable Macros</u>." This will allow the user to proceed.

Security Warning		\mathbf{X}
"E: \SDC Calculator Version 1.0).xls" contains macros.	
Macros may contain viruses. I macros are legitimate, you mig	t is usually safe to disal ht lose some functiona	ble macros, but if the ality.
Disable Macros	Enab Macros	More Info

Step 3.

If you prefer to change the resolution of the workbook pages you are viewing, Use the \underline{V} iew menu tab in Excel, adjust the viewing area of the workbook by using the \underline{Z} oom function.

Step 4.

When finished, save the new file with an unique name for future reference (e.g. "Scenario 1").



Opening Screen

This is the opening page of the **SDC2** workbook. Once you've entered the current year there are some choices that you'll need to make as you proceed. The good news is that you can always go back to your saved "blank" file if you want to start over. Also, you can switch back and forth between your choices to see what each method would produce. One of these key decisions is choosing between



the **Growth Related** or **Equity Buy In** methods of calculating system development charges. On the next page you'll find a more complete explanation of both methods.



	Environmental Finance Center at Boise State University (208) 426-1567											
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	A B	C D E F	G H I J K L M									
1	SY	STEM DEVELOPMENT	T CHARGE CALCULATOR									
3 4 5		Please enter the current year:	2006									
6		The System Development Char	arge Calculator gives the user									
8		two choices for charging the co	ost of growth to the new users.									
9		Once these SDCs are establish	hed and paid, the new users be-									
11		come full participants in the onc	going fee for service system.									
13	Both c	Charge Gick on one of these calou	ppment									
14		charge. Cick on one of these calcu	ulation methods below to get started.									
16		Growth Related	Equity									
18	The Grow	th Related Method of calculating a System	The Equity Buy In Method of calculating a System									
19	capital im	ent Charge is based on the projected cost of provements directly related to accommodating	existing customers have built up equity in the existing									
21	growth.		capital facilities and that new customers need to be assessed a fee that will approximate the equity position of existing customers.									
22												
24	120											
25	Return	Click the "Return" button to return to the	Click this button to import CAPFinance data									
27	Growth	Related Methodology	Equity Buy In Methodology									
29	This me	thod of calculating system de-	This method is also conservative, but it									
30	velopme	ent charges is conservative and	is significantly different from the									
32	determi	nes an equivalent residential	"growth" method. The difference here									
33	unit or n	neter size equivalent charge for	is that additional growth compensates									
	the cost	of capital improvements di-	for existing users (and former users)									
	rectly as	ssociated with new growth ar-	who have contributed to the establish-									
	eas. Th	e SDC2 calculates the costs of	ment of facilities to which the new us-									
	system	capacity needed for the new	ers are going to connect. This method									
	develop	ment and allows any remaining	demands that a portion of the equity in									
	system	capacity to be reserved for ad-	the system be "purchased" by the new									
	ditional	users added <u>after</u> this new ser-	users when existing facility capacity will									
	vice are	a is added.	be shared with those new users. New									
			users will then have an equivalent eq-									
6			uity position in the water system.									

Growth Related Method





Growth Related Method Worksheet Part 1

Instructions for completing the worksheet can be found by clicking on this button. The **Growth Related Method** requires only one worksheet to be completed in order to generate the system development charge. For this User's Manual we have divided the worksheet into two sides in order to explain how it is to be completed.

NOTE: The user will enter information in the Blue and Green colored columns. The SDC Calculator produces data in the Yellow columns.



Go to the next page for information on how to complete the Growth Related Method worksheet.



Growth Related Method Worksheet Part 2

The **Growth Related Method** requires only one worksheet to be completed in order to generate the system development charge. For this User's Manual we have divided the worksheet into two sides in order to explain how it is to be completed.

NOTE: The user will enter information in the Blue and Green colored columns. The SDC Calculator produces data in the Yellow columns.

Tatel Unit Cart far Planned Grauth

(\$/qal/day)

The unit cost portion of capacity (for growth during the planning period) are totaled for all common-use capital improvements. This is the "Total Unit Cost for Planned Growth (\$/gal/day)".

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00	500,000	100,000	400,000	40.0%	0.2000		

Worksheet Columns — User Inputs:

In the column titled "Existing Customer Capacity (gallons/day)," input the portion of the capacity of the capital improvement that will be utilized by existing customers in gallons per day.

Inputs

Calculated

In the column titled "Excess Capacity (gallons/day)," input any portion of the capacity of the capital improvement that will serve future growth beyond the current planning period. The excess capacity will be available <u>after</u> the new customers are added.

The Following Calculations are Provided by the SDC Calculator:

Portion of the capacity for growth during the planning period in gallons per day ("Capacity Allocated to Growth During the Planning Period" column).

Percent of the total capacity allocated for growth in the current planning period ("% of Total Capacity Allocated for Growth During the Planning Period" column).

Unit cost of the portion of capacity for growth during the planning period ("Unit Cost of Capacity Allocated to Growth Occurring During Planning Period" column).



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Equity Buy In Method

Using Existing Asset Inventory Information

Calculator Version 1.0

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8				C	Equival	ent Re	sident	ial Unit	5	Equivalent Meter Units						
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10			Cu	ment use	ers averag	e day d	emand	gallons	/day).							
40		Both	1 calc	ulatior	metho	dolog	gies b	elow o	an be	e used to calculate the System Development						
13			0	Charge	. Click	on or	ne of t	these of	alcul	ation methods below to get started.						
15				G	rowth Rela	ated				Equity						
17			<u> </u>													
18		Equi	ty B	uy In	Metho	odol	ogy			The Equity Buy In Method of calculating a System						
20	•	This	meth	nod us	ses inf	orma	ation	abou	t	existing customers have built up equity in the existing						
21		existi	ina c	anital	asset	s de	velor	ned in	-	capital facilities and that new customers need to be						
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30	ł	these	e exi	stina :	assets	ma	/ be	neede	be	be imported from CAPFinance into the Equity Buy In						
31		hv th	ene	w aro	wth us	sers	wher	n thev		Method Worksheets and used to help calculate the						
32		oro a		to th			eton	י נווסץ ה		Equity Position of the asset.						
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35	•	To sa	ave y	ou co	onside	rable	time	e in	1.	or fitness for a particular purpose. As a result, this software and documentation are						
37		puttir	ng cu	irrent	asset	infor	mati	on in	e	or inability to use the software or documentation, even if advised of the possibility						
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Equity Buy In Method CAPFinance Data Migration: Step 1

Development

Charge Calculator Version 1.0



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Equity Buy In Method CAPFinance Data Migration: Step 2

SYSTEM DEVELOPMENT CHARGE CALCULATOR Please enter the current year 2006 Which method of equivalent units will be used? C Equivalent Residential Units Equivalent Meter Units **CAPFinance Dataset Import** 275,000 Current users average day demand (gallons/day): 1 Both calculation methodologies below oment After you select your dataset, Charge. Click on one of these Please select the dataset you wish to import from. Growth Related CAPFinance migrates the data The Growth Related Method of calculating a Syste (stei Development Charge is based on the projected cost capital improvements directly related to accommodal the SDC2 and confirms that existing d to be arowth ity positio the dataset import has been Return Click the "Return" button to return to the completed. selected calculation method main page into the Equity Buy in Method worksheets. If CAPFinance has been used to develop a system asset inventory, the relevant data for each asset car The next step will be to use the be imported from CAPFinance into the Equity Buy In Method Worksheets and used to help calculate the Equity Position of the asset. Equity Buy In Worksheets. Boise State University, the Environmental Finance Center, and the Authors (the "distributors") make no warranty or representation, either expressed or implied, with respect to this software or documentation, their quality, performance, merch ility, or fitness for a particular purpose. As a result, this software and docur ted "As Is", and you, the user, are assuming the entire risk as to their quality and performance. In no event will the distributors or their subcontractors be lia for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation, even if advised of the possibility H MainPg / Grow C D E F G H в SYSTEM DEVELOPMENT CHARGE CALCU ATOR 2006 4 5 Please enter the current year Which method of equivalent units will be used? 6 7 C Equivalent Residential Units Equivalent Meter Uni 8 2 275.000 10 Current users average day demand (gallons/day): Both calculation methodologies below can be used to calculat e System Development 13 14 Charge. Click on one of these calculation methods b ow to get started. 15 Growth Related Equity 16 Local a System 18 The Growth Related Method of calculating a System Development Charge is based on the projected cost of e concept that 19 Data Import of Example Complete quity in the existing capital improvements directly related to accommodating growth 21 omers need to be OK te the equity position 23 24 25 Return Click the "Return" button to return to the Click this button to import CAPFinance data 26 selected calculation method main page into the Equity Buy in Method worksheets 28 If CAPFinance has been used to develop a system 29 asset inventory, the relevant data for each asset car 30 be imported from CAPFinance into the Equity Buy In 31 Method Worksheets and used to help calculate the 32 Equity Position of the asset. 33 34 Boise State University, the Environmental Finance Center, and the Authors (the "distri ke no warranty or repres 35 respect to this software or documentation, their quality, performance, merchantability, or fitness for a particular purpose. As a result, this software and documentation are 36 presented "As is", and you, the user, are assuming the entire risk as to their quality and performance. In no event will the distributors or their subcontractors be liable 37 for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation, even if advised of the possibility > N MainPg / GrowthMenu / GrowthWS / EquityMenu / HydrantsEg / MetersEg / SurfWaIntakeEg / CollectImpoundEg / ResStandEg / Supp Go to the next pages for information System

Go to the next pages for information on how to complete the Equity Buy In Method worksheets.



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Equity Buy In Method Opening Menu Page

	A	B	С	D	E	F	(G	Н		J	K	L	M			
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2 3	-				E	quity	Buy Me	' In I enu	Metho	bd		This sc	roll bar a	allows	you		
4 5 6 7 8 3 10						Currer	CAPFinance asset ac- counts that contain infor- mation about the capital assets owned by the cus- tomers										
11 12 13 14 15 16 17 18 19 20 21 22 23 24	Main Menu Report			Click on th above to s that infrast using the l Click the "	ck on the drop down arrow in the Infrastructure Account selection box ove to select an infrastructure account to input cost data for the assets at infrastructure account to calculate the System Development Charge ing the Equity Buy In Method. ck the "Main Menu" button to go to the Main Menu.							tomers. Each asset category has its own worksheet. On each worksheet select the assets that new custom- ers will use. SDC2 will calculate the equity buy in costs of that asset to be paid by the new users.					
25 26 27 20 30 37 32	After tion a	sele bou	ecting t the	g the C water that wi	APFi syste	nance em's c	e dat capita	a filo al as	e that ssets, irowth	t cont you o	ains s can b	specific egin to s. The	inform select	1a-			

ing pages describe the "Equity Buy In Worksheet."

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At any time you can return to the "Main Menu" by selecting that button.

Once the worksheets are completed, you can proceed to the "Report" area by selecting the "Report" button.



34 |34 |3

Instructions for completing the worksheet can be found by clicking on this button.

The Equity Buy In Method requires one worksheet to be completed for each asset inventory category used in CAPFinance in order to generate the system development charge. For this User's Manual we have divided the worksheet into two sides in order to explain how it is to be completed. In this example we are using the HYDRANTS asset inventory found in CAPFinance.

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						L .			E	F F	G	н	Innute	
2	Hydrants	k to go to the Equity Buy In		-	To ente	er a checkm	ark in the Common]					Inputs Calculated CapFinance	
5		· · · · · · · · · · · · · · · · · · ·			letter "a	a".	a och ana type the					TOTAL EQUI	TY POSITION	3
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9	Foothills East			~	\$	25,000	\$.	\$	25,000	9	\$ 47,132	\$ 52,368	\$ 61,489	\$
10	Main Street									C 12	\$ 62,637	\$ 67,857	\$ 86,160	
11	West Subdivisi	on				2				16	\$ 80,000	\$ 20,000	\$ 43,657	
12	Foothills East					3				9	\$ 47,132	\$ 52,368	\$ 61,489	
13	Main Street									12	\$ 62,637	\$ 67,857	\$ 86,160	
14	West Subdivisi	on								16	\$ 80,000	\$ 20,000	\$ 43,657	
15	Foothills East									9	\$ 47,132	\$ 52,368	\$ 61,489	Γ
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Column Descriptions

CAPFinance asset information is preloaded into the SDC Calculator when you select your CAPFinance dataset.

Select the Capital Improvements in the first column that have excess capacity 2 and will be used by new developments. Although your CAPFinance dataset will be extensive (and spread over several Equity Buy In Worksheets) you may find that only a few existing assets will be needed for new development.

3

1

Outstanding Amount of Liabilities (Debt): input any outstanding liabilities (e.g., debt) for the selected assets. The SDC2 discounts outstanding debt from the existing value of the asset when calculating owners' equity in the system.

> Go to the next page for more information on how to complete the Equity Buy In Method worksheet.



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Instructions for completing the worksheet can be found by clicking on this button.

The Equity Buy In Method requires one worksheet to be completed for each asset inventory category used in CAPFinance in order to generate the system development charge. For this User's Manual we have divided the worksheet into two sides in order to explain how it is to be completed. In this example we are using the HYDRANTS asset inventory found in CAPFinance.

		A	В	С	D	E	F	G	Н		~
1	EQUITY BU	Y IN METHOD WORKSHEETS]							Inputs	
2	Hydrants		T							Calculated	
3	_			To enter a checkma	rk in the Common					CapFinance	
4	Equity Menu	k to go to the Equity Buy In Method Menu		Use column, select a	a cell and type the					K 1	
5	—	Eiter Max Common		letter "a".					TOTAL EQUI	TY POSITION	\$
6	Ins tructions	Assets									
7							-				_
				Outstanding				Accumulated	Current Value of	Current Value of	
			Common	Amount of	Contributions	Total Liabilities &	# of	Straight Line	Asset in	Asset in Current	E
		Capital Improvement	Use (\$)			Contributions Years Depreciation			Installation Year Year Dollar		
				(Liebt)		(\$)	installed	(\$)	Lollars (*)	(BOOK Value)	
8				(+)					(*)		-
9	Foothills East		× ,	\$ 25,000	\$.	\$ 5,000	6	* 7 47,132	2 52,368	\$ Q 61,489	\$
10	Main Street			3	4	J	12	\$ 62,637	67,857	\$ 86,160	
11	West Subdivision	1					16	\$ 80,000	\$ 20,000	\$ 43,657	
12	Foothills East						9	\$ 47,132	\$ 52,368	\$ 61,489	
13	Main Street						12	\$ 62,637	\$ 67,857	\$ 86,160	
14	West Subdivision	1					16	\$ 80,000	\$ 20,000	\$ 43,657	
15	Foothills East						9	\$ 47,132	\$ 52,368	\$ 61,489	
16	Main Street						12	\$ 62,637	\$ 67,857	\$ 86,160	
17	West Subdivision	1					16	\$ 80,000	\$ 20,000	\$ 43,657	L
18											
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21		- Leave - December (Leave									

Column Description

Contributions: Similar to Outstanding Amount of Liabilities (Debt) shown on 4 the previous page. Input the dollar value of capital contribution relative to this selected asset. The contributions will be not be included in the calculation of owners' equity. For example, grant dollars received for construction are contributions.

SDC2 Calculations

(5) Total Liabilities and Contributions: Sum of Columns 3 and 4.

(6) # of Years Installed: The difference between current year and the year in which the asset was established (from CAPFinance).

(7) Accumulated Straight Line Depreciation: Accumulated depreciation to date. Calculated based on 20 year depreciation schedule.

Go to the next page for more information on how to complete the Equity Buy In Method worksheet.



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Instructions for completing the worksheet can be found by clicking on this button.

The **Equity Buy In Method** requires one worksheet to be completed for each asset inventory category used in CAPFinance in order to generate the system development charge. For this User's Manual we have divided the worksheet into two sides in order to explain how it is to be completed. In this example we are using the HYDRANTS asset inventory found in CAPFinance.



today's asset value installation year dollar value.

(9) Current Value of Asset in Current Year Dollars: Calculates the current book value of the asset using current year dollars.

(10) Equity Position: Calculates the difference between Column (9) and Column (5). This is the owners' equity position that will be used to deter mine the "buy in" cost for new users of the system components used for new development.

Go to the next page for more information on how to complete the Equity Buy In Method worksheet.



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The **Equity Buy In Method** requires one worksheet to be completed for each asset inventory category used in CAPFinance in order to generate the system development charge. For this User's

Manual we have divided the worksheet into two sides in order to explain how it is to be completed. In this example we are using the HYDRANTS asset inventory found in CAPFinance.

The **Total Equity Position** is calculated by accumulating the owners' equity in each of the CAPFinance asset categories. This total is then used to calculate the ERU or meter equivalent system development charge based on the **Equity Buy In Methodology.**

Equity Menu k to go to the Equity Buy In Method Menu
Filter Non-Common
Filter Non-Common

QUITY BUY IN METHOD

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Calculated Capering TOTAL EQUITY POSITION

Inputs

7	Instructions Assets									
8	Capital Improvement	≢ of Years installed	Accumulated Straight Line Depreciation (\$)	Current ¥alue of Asset in Installation Year Dollars (\$)	Current ¥alue of Asset in Current Year Dollars (Book ¥alue) (\$)	Equity Position (\$)	Installation Year	Useful Life (yrs.)	Installation Cost (\$)	Inflation Rate (%)
9	Foothills East	9	\$ 47,132	\$ 52,368	\$ 61,489	\$ 36,489	1997	19	\$ 99,500	1.80%
10	Main Street	12	\$ 62,637	\$ 67,857	\$ 86,160		1994	25	\$ 130,494	2.01%
11	West Subdivision	16	\$ 80,000	\$ 20,000	\$ 43,657		1990	20	\$ 100,000	5.00%
12	Foothills East	9	\$ 47,132	\$ 52,368	\$ 61,489		1997	19	\$ 99,500	1.80%
13	Main Street	12	\$ 62,637	\$ 67,857	\$		1994	25	\$ 130,494	2.01%
14	West Subdivision	16	\$ 80,000	\$ 20,000	\$ 43,657		1990	20	\$ 100,000	5.00%
15	Foothills East	9	\$ 47,132	\$ 52,368	\$ 61,489		1997	19	\$ 99,500	1.80%
16	Main Street	12	\$ 62,637	\$ 67,857	\$ 86,160		1994	25	\$ 130,494	2.01%
17	West Subdivision	16	\$ 80,000	\$ 20,000	\$ 43,657		1990	20	\$ 100,000	5.00%
18										

Column Description

CAPFinance Imported Information (Purple Column Headings)

Installation Year: Year the asset was established.

Useful Life: Estimated years that the asset is expected to provide and acceptable level of service.

Installation Cost: The cost of establishing the capital asset.

Inflation Rate: The specific cost inflator for the asset based on industry performance.



SDC Charges Reports



SDC Charges Reports



SDC Charges Reports

Charges based on Equivalent Residential Units

	А	В	C	¢	E		F	G
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3		S	/stem	i Develo	oment Charge by E	quivalen	t Residenti	al Units
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9			Tota	I Equity Posi	tion	\$	390,106.95	
10							i.	
11			Cos	t per ERU		\$	390.11	
12			0		-			
13			Grov	vin weino	a			
14			0		sees day, damand (nal/day)		075 000	1
15			Cun	ent users ave	rage day demand (gai/day)		275,000	
17			Usa	ge per ERU (g	al/day/ERU)		275.00	
19			Tota	I Unit Cost fo	r Planned Growth (\$/gal/day)	S	0.20]
20			0			"	55.00	1
21	-		Cos	t per ERU		9	55.00]
23		Th	o Svet	om Dovelor	ment Charge based			
24		on	Fauiv	alent Resid	ential Units is shown in			Back
25		thi	s repor	t.			-	
27								
28		lf c	lata ha	s been ent	ered for both the			
30		gro	owth ar	nd equity bi	ly in methods, then			
31		CO	mparai	Die results v	will be displayed.			
32		Nc	tice th	at the SDC	charges using the			
34		Eq	uity Bu	iy In metho	d are greater.			
I	🕨 🕨 📈 Wat	Th	e SDC	2 uses the	number of equivalent	rGenEq 🖌 Lal	bOffEq 🖌 ToolsEq	/ TranPowEq / M
		reg	sidentia	al units ente	ered in the opening in-		Svst	em
		pu	t page	to perform	this calculation		Developm	ent
		1. 2.	1.35				Calcula	rge
						-	Versio	n 1.0

User Notes

All questions related to the use of the **System Development Charge Calculator** model and the background on how the methodologies were developed should be directed to Bill Jarocki at (208) 426-1567 or bjarock@boisestate.edu.

