

SANTA ROSA COUNTY SCHOOL DISTRICT SCHOOL CAPACITY ENHANCEMENT STRATEGY SCOPE OF SERVICES

BUILDING LIVABLE COMMUNITIES, INC

THE CHALLENGE

Santa Rosa County Schools are at a crossroads. Like school districts throughout Florida, the demand for new school capacity subsided during the economic recession that began in 2008. Now that residential growth has returned, the demand for new school capacity is rapidly escalating but without the tools and resources that were put in place under mandated school concurrency.

The Santa Rosa County School District (SRCSD) has opened a dialogue with Santa Rosa County and the cities of Milton, Gulf Breeze and Jay regarding policies, strategies and programs to ensure that public school capacity is in place when required by the demands of new residential development.

SRCSD desires professional assistance to develop, in cooperation with local government, the tools and resources necessary to meet school capacity needs while supporting the robust economic growth of Santa Rosa County.

DESIRED OUTCOME

Building Livable Communities, Inc in cooperation with the University of Florida has developed GIS-based analytical tools for application in Santa Rosa County. These tools are specifically designed for school capacity planning and provide a foundation for the formulation of a *School Capacity Enhancement Strategy*.

The assignments and tasks embodied in this scope of services are designed to prepare the SRCSD and the local governments to adopt and implement an effective *School Capacity Enhancement Strategy* will help to improve the accuracy of the *2017-18 Five Year Educational Plant Survey*. The desired outcomes of this effort include:

- Continued implementation of the *Interlocal Agreement for Public School Facility Planning (ILA)*;
- Review and update of local government comprehensive plans and the ILA;
- A reliable 5 to 10 year projection of the public school capacity required to support new residential development;
- A reliable projection of the land and facility cost to meet anticipated demand;

- An evaluation of fiscal resources available to meet school capacity needs; and
- The evaluation and implementation of policies, strategies and tools required to implement a responsible capacity enhancement program.

ASSIGNMENT 1: REVIEW AND EVALUATION OF THE INTERLOCAL AGREEMENT AND PUBLIC SCHOOL FACILITIES ELEMENTS

The Community Planning Act of 2011 removed the mandate for school concurrency and the Public School Facilities Element. These provisions are now optional. The Interlocal Agreement remains a requirement. In response to the Community Planning Act, the Santa Rosa County process eliminated the school concurrency provisions.

In view of the current comprehensive plan update now underway in Santa Rosa County and the evidence that high growth rates are returning, these amendments should be reexamined from the SRCSD perspective.

Task 1.1: Evaluation of the Santa Rosa County Comprehensive Plan.

BLCINC will evaluate the Santa Rosa Comprehensive Plan with regard to its treatment of public schools and provide recommendations for modification if appropriate. Emphasis will be placed on the Santa Rosa County Comprehensive Plan with the understanding that recommendations will be applicable to municipalities as well.

Task 1.2: Evaluation of the *Interlocal Agreement for Public School Facility Planning*.

BLCINC will evaluate the Interlocal Agreement from a “best practice” perspective and provide recommendations for modification if appropriate.

Deliverables: Comp Plan / ILA Report with Recommendations

ASSIGNMENT 2: CAPACITY NEEDS ANALYSIS

Each Educational Service Area (ESA) has a different development profile and demographic dynamic. GIS permits a comprehensive and interactive of valuation of these characteristics for ESA. This assignment envisions the preparation of a development and growth profile for each ESA that will support SRCSD decisions regarding school capacity and potential enrollment demands. It is the intent of this assignment to provide an enhanced link between school planning decisions and the comprehensive planning and growth programs of the local governments.

Task 2.1: Develop profiles for ESAs

Based on the listing and available data, BLCINC will prepare profiles of the ESAs and categorize each into elementary, middle and high school levels. Additionally, the Geodatabase will be organized to facilitate the development of profiles by attendance zone.

Task 2.2: Update school capacity data.

BLCINC will import school capacity data from the 2015-2016 F.I.S.H. (Florida Inventory of School Houses).

Task 2.3: Import development activity data

BLCINC will import development activity data from Santa Rosa County and the municipalities. These data will include historical data (15 years), recent building permit data (1-2 years) and "pipeline" activity indicating ongoing and pending development.

Task 2.4: Project 5-10 Year residential development by ESA

Utilizing data currently included in the Geodatabase and updated information assembled in Task 1.3 above, BLCINC will develop 5 year and 10 year projections of residential development activity. Student Generation Multipliers (SGM) will be applied to generate corresponding student enrollment projections by ESA and by school level. These projections will be compared to COFTE projections to obtain "best estimates" of student enrollment during the 5 year and 10 year projection periods.

Task 2.5: Project capacity required to meet 5-10 Year demand

BLCINC will compare public school capacity with projected enrollment to project elementary, middle and high capacity needs by ESA.

Task 2.6: Identify optimal locations for required capacity.

BLCINC will examine historical and projected residential development patterns to identify optimal locations for new elementary, middle and high capacity within each ESA. These locations will be "generalized" (not site-specific). The analysis will be site-specific if the SRCSD identifies such sites.

Task 2.7: Preliminary Capacity Needs Report

BLCINC will prepare a "Preliminary Capacity Needs Study" documenting the findings of Tasks 1.1 through 1.6.

Task 2.8: Workshop

BLCINC will conduct a workshop regarding capacity needs with the SRCSD staff and the staff working group.

Deliverables:

- **Preliminary Capacity Needs Report**
- **Workshop**

ASSIGNMENT 3: EVALUATE FISCAL RESOURCES

An examination of fiscal resources for school capacity will occur concurrently with the projection of capacity needs identified in Assignment 2. This analysis will include all existing and potential funding sources including school impact fees. The funding report described in this assignment will be sufficient to support the imposition of impact fees if such action is deemed appropriate.

Task 3.1: Import of Fiscal Data

BLCINC will import all available fiscal data pertaining to public school capacity. The 2015-2016 Five Year District Facilities Plan will be the primary source of fiscal data supplemented by additional data provided by the SRCSD as appropriate.

Task 3.2: Demographic Parameters.

BLCINC will assemble and document historical school age population and enrollment trends. The SRCSD is the primary source of these data.

Task 3.3: Student Occupancy

BLCINC will document "student occupancy" by dwelling type. SGM previously developed will be the primary source of these data.

Task 3.4 Facility Costs

Facility costs must be developed based on actual experience at a precision suitable to support impact fees, BLCINC will assist the SRCSD to determine facility cost on a per student station basis. These costs will include permanent facilities, land and buses. Supplemental information will be obtained from the Florida Department of Education.

Task 3.5: Student Stations & Land Area

BLCINC will apply the cost data developed in Task 2.4 above to capacity needs identified in Assignment 1 to determine the costs of required 5 year and 10 year capacity enhancements.

Task 3.6: Funding

BLCINC, in cooperation with the SRCSD staff, will identify all state and local funding sources available for public school capacity including projections of funding levels during the 5 year and 10 year projection periods.

Task 3.7: Impact Cost

BLCINC will document the net cost of providing a student station in Santa Rosa County and project this cost for the 5 year and 10 year planning periods. The net cost per dwelling unit will be derived by applying SGM for single family and multi family dwelling types.

Task 3.8: Comparisons

For comparison purposes, BLCINC will provide a table showing current school impact fees within Florida.

Task 2.9: School Funding Report

BLCINC will prepare a "Preliminary School Funding Report". This report is intended to serve as a companion to the capacity needs identified in Assignment 1.

Deliverables:

- **Preliminary School Funding Report**

ASSIGNMENT 4: FIVE YEAR PLANT SURVEY / CONSULTATION WITH FDOE

The Santa Rosa County School District is required by the FDOE to prepare its Five Year Plant Survey in 2017. This survey provides the basis for state funding and will be critical to justify state funding to meet capacity needs.

Consultation with FDOE is recommended regarding funding and the methodologies for projection of student enrollment

Task 4.1: Workshop with FDOE regarding projection methodologies and findings

BLCINC will organize and conduct a workshop including representatives from FDOE and Santa Rosa County to discuss the implications of student enrollment projections on the *Capacity Enhancement Strategy* and the Five Year Plant Survey scheduled for 2017.

Task 4.2: Documentation of the FDOE workshop and recommendations.

BLCINC will document the findings of the FDOE / Santa Rosa County workshop and provide recommendations pertaining to the Capacity Enhancement Strategy

Deliverables:

- **Workshop with FDOE / SRCSD Staff**

ASSIGNMENT 5: CAPACITY ENHANCEMENT STRATEGY

Based on (1) the capacity needs analysis, (2) the school funding evaluation and consultation with FDOE, a Capacity Enhancement Strategy will be formulated and considered for adoption when creating the *2017-18 Five Year Educational Plant Survey Plan*.

Task 5.1: Formulate 5-10 Year Capacity Enhancement Strategy

Based on (1) the capacity needs analysis, (2) the school funding evaluation and consultation with FDOE, BLCINC will draft a 5-10 Year Capacity Enhancement Strategy. This strategy will identify the number of student stations and their general location to meet the 5 year and 10 year demand. The strategy will also identify funding to meet the projected demand.

Task 5.2: Workshop with SRCSD staff / Staff Working Group

BLCINC will conduct a workshop with the SRCSD staff, staff working group and others identified by the project manager to review the *Capacity Enhancement Strategy*. BLCINC will modify the document to reflect the results of the staff workshop.

Task 5.3: Presentation of Capacity Enhancement Strategy to Local Governments

BLCINC will present the "*Capacity Enhancement Strategy*" to a joint meeting of the School Board and representatives of the local governments. The SRCSD will be responsible for organizing and hosting this joint meeting.

Task 5.3: Prepare final Capacity Enhancement Report

Based on the results of the staff workshop and the joint meeting of the School Board and local governments, BLCINC will prepare a final *Capacity Enhancement Report*.

Task 5.4: 2016-2017 Five Year District Facilities Plan

BLCINC will provide consultation to the SRCSD regarding integration of the Capacity Enhancement Strategy into the *2017-18 Five Year Educational Plant Survey*.

ASSIGNMENT 6: SCHOOL CAPACITY MANAGEMENT

The *Interlocal agreement for Public School Facility Planning* provides as follows:

- *ILA Section 1 requires the development and application of student enrollment [projections on both a districtwide and "Educational Service Area" basis.*
- *ILA Section 2.1 requires the coordinating and sharing of information specifically (1) the annual preparation of the Five Year District Facilities Work Plan and the transmittal of this plan to local governments by August 31st. ILA Section 2.2 requires submittal of the draft Five Year Plant Survey [due in 2017] to local governments for review.*
- *ILA Section 2.3 requires that local governments report growth and development trends by February 1st of each year.*
- *ILA Section 2.5 and ILA Section 3 require the implementation of a school capacity tracking system.*
 - *ILA Section 3.5 establishes the "Staff Working Group" and places responsibility on the SRCSD to coordinate and convene an annual meeting (March).*
 - *ILA Section 3.6 establishes a process for determining school capacity for proposed residential development projects and provides for proportionate share mitigation.*

Task 6.1: Update of Geodatabase

BLCINC will collaborate with the SRCSD staff and Santa Rosa County to update the Geodatabase at 2 established intervals during each year.

Task 6.2: Participation in Meetings. BLCINC will participate in meetings required by the ILA and other meetings as may be required related to school capacity planning.

Task 6.3: 2017-18 Five Year Educational Plant Survey

BLCINC will assist the SRCSD with the development of the *2017-18 Five Year Educational Plant Survey* with emphasis on those elements required to support school capacity planning.

- **Enrollment Projections / Reconcile to COFTE** - BLCINC will assist the SRCSD to update enrollment projections and reconcile these projections with COFTE;
- **Capacity Enrollment Tables** - BLCINC will update the capacity / enrollment data (2016-17 to 2020-21) required to generate Capacity / Enrollment Tables for high, middle and elementary levels. These tables will be based on data provided by the SRCSD staff.
- **Capital Improvement Element for Local Governments** - Based on the 2016-2017 Five Year District Facilities Plan, BLCINC will prepare tables and other materials for incorporation by the local governments for the required annual update of their Capital Improvement Elements.

Task 6.4: Review of Development Proposals.

During the term of this agreement, BLCINC will assist the SRCSD with the review of development proposals. This task will include the review and evaluation of applications, the preparation of reports related to such specific applications, and participation in the development review process of the local governments pertaining to development applications.

Timeline

Assignment	2015	2016			
	4th Qtr	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Evaluate CP/ILA					
Needs Analysis					
Funding Analysis					
Plant Survey / FDOE					
Capacity Enhancement Strategy					
Capacity Management					

Budget & Payment Schedule

Assignment 1: Comp Plan / ILA Review	\$ 6,000
Assignment 2: Needs Analysis	\$ 8,400
Assignment 3: Funding Analysis	\$ 6,800
Assignment 4: FDOE / 5 Yr Plant Survey	\$ 2,800
Assignment 5: Capacity Enhancement Strategy	\$ 6,400
Assignment 6: Capacity Management	\$ 6,400
Total	\$36,800

Projected Payment Schedule

Assignment	2015	2016			
	4th Qtr	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Evaluate CP/ILA	\$6,000				
Needs Analysis		\$8,400			
Funding Analysis		\$6,800			
Plant Survey / FDOE			\$2,800		
Capacity Enhancement Strategy				\$6,400	
Capacity Management		\$1,400	\$2,000	\$2,000	\$1,000
Total	\$6,000	\$16,600	\$4,800	\$8,400	\$1,000