

**SANTA ROSA COUNTY SCHOOL DISTRICT
SCHOOL IMPACT FEE ANALYSIS
SCOPE OF SERVICE**

**December 2, 2019 –
January 31, 2020**

The Santa Rosa County School Board (SRCSB) desires to consider the use of **School Impact Fees** to supplement the capital funds available to provide school capacity to accommodate residential growth. Building Livable Communities, Inc (BLCINC) is retained to provide advice and consultation to the SRCSB, local governments and the community regarding school impact fees and to develop the studies, ordinances and agreements required to apply and administer a school impact fee program.

The scope of services will result in the development of the studies, ordinances and agreements required to establish and administer a "School Impact Fee" program for Santa Rosa County. Specifically, BLCINC will provide:

- A "School Impact Fee Analysis" to establish the "a maximum allowable impact fee" that may be imposed based upon established legal, financial and administrative norms and best practices;
- Review of a draft ordinance establishing a "School Impact Fee" program suitable for adoption by Santa Rosa County;
- Review of a draft interlocal agreement for the collection and administration of school impact fees; and
- Consultation with SRCSB, SRCSB staff and consultants, and local government officials and agencies including participation in public hearings and meetings related to adoption of the impact fee program.

ASSIGNMENT 1: SCHOOL IMPACT FEE ANALYSIS

School impact fees are one time assessments paid by new residences to *offset* the demand created for school capacity. Such fees cannot exceed the proportionate share of the cost of new school construction attributed to each residence. Consequently, a "rational nexus" must be established between the new residence being constructed and the resulting demand for new school capacity. The calculations must reflect the most current and best estimates of the cost associated with school construction. The "School Impact Fee Analysis" is intended to establish a "maximum allowable fee" that can be imposed in consideration of the cost data and the student generation characteristics of varying housing types. The fee imposed may not exceed the "maximum allowable fee" established by the study.

TASK 1. 1: DEVELOPMENT / UPDATE OF THE REPORT TEMPLATE

BLCINC will initially provide a report template specifically designed for school impact fees and customized for application in Santa Rosa County.

Deliverable : Impact Fee Study

TASK 1.2: STUDENT GENERATION VALIDATION / IMPORT OF DATA

BLCINC will validate the student generation characteristics (Student Generation Multipliers) for each housing type. This validation will match the geocoded student addresses with housing type data maintained by the property appraiser. Housing types will be categorized in accordance to their use classification established by the Property Appraiser.

TASK 1.3: IMPORT OF CURRENT FINANCIAL DATA FROM THE 2019-20 FIVE YEAR DISTRICT FACILITIES.

BLCINC will import all relevant financial and school related data from the 2019-2020 Five Year District Facilities Plan. This plan contains both summaries and details of revenues available for new school construction and how these funds are allocated during the five year planning period.

TASK 1.4: IMPORT OF SCHOOL FACILITY COST DATA

The SRCSB staff will be responsible for providing cost and other relevant data required for the school impact fee study not otherwise provided by the Five Year District Facilities Plan.

BLCINC will import data provided by the SRCSB staff into the report template as appropriate.

Task 1.5: Final Maximum Allowable Fee Report

Based on the receipt and import of the data requirements noted in Tasks 1.1. through 1.4 above, BLCINC prepare a final report establishing the maximum allowable school impact fee for each housing type.

Deliverable: School Impact Fee Analysis for Santa Rosa County

ASSIGNMENT 2: DRAFT OF SCHOOL IMPACT FEE IMPLEMENTING ORDINANCE

The **School Impact Fee Program** must be established by ordinance of Santa Rosa County and apply to all residential development within the County (including incorporated areas).

Task 2.1: Review of Draft Implementing Ordinance

BLCINC will provide consultation regarding a draft implementing ordinance prepared by SRCSB legal counsel.

Deliverable: Consultation Regarding Draft Implementing Ordinance

ASSIGNMENT 3: DRAFT INTERLOCAL AGREEMENT FOR ADMINISTRATION OF THE SCHOOL IMPACT FEE PROGRAM

Impact fees are collected at the time a building permit or certificate of occupancy is issued for a new residential structure. Consequently, the local government issuing the certificate of occupancy collects the impact fee on behalf of the School Board. The Interlocal Agreement defines this process including procedures, administrative fees, the handling of funds and other administrative matters.

BLCINC will provide draft Interlocal agreement

Deliverable: Review and Comment of Draft Interlocal Agreement

ASSIGNMENT 4: DELIVERY / PRESENTATION OF THE SCHOOL IMPACT FEE PROGRAM

At the direction of the SRCSB staff, BLCINC will present the "School Impact Fee Program" to the School Board, local governments and public.

Budget & Payment Schedule

Assignment 1: Report	\$ 9,500
Assignment 2: Ordinance (Consultation)	\$ 2,000
Assignment 3: Interlocal Agreement	\$ 500
Assignment 4: Meetings / Presentation	\$ 3,000
Total	\$ 15,000