

**SANTA ROSA COUNTY SCHOOL DISTRICT  
SCHOOL PLANNING  
2017-2018 SCOPE OF SERVICE  
September 1, 2017 – December 31, 2018**

**BUILDING LIVABLE COMMUNITIES, INC**

During 2015, 2016 and the first half of 2017, Building Livable Communities, Inc (BLCINC) in collaboration with DRMP, Inc has assisted the Santa Rosa County School District to develop a systematic and reliable approach to school planning. During this period the following objectives have been accomplished.

- A GIS capability has been established and applied including protocols for periodic update including
  - School facility data
  - Student addresses
  - School districts / Educational Service Areas
  - Residential development data
  - Land Use data
  - Local government information
  - Transportation networking data
- A methodology for enrollment projections has been applied based on
  - COFTE
  - BEBR
  - Historical Development Trends
- The linking of residential development activity to school enrollment
  - Student Generation Multipliers
  - Development potential under comp plan / zoning
- The identification of existing capacity needs and the projection of future needs by geographic area
- The development of working relationships with local governments and the property appraiser
- Recommendations for policy and procedural modifications for improved coordination and cooperation regarding development activity and the impact on public schools

This scope of services – building on the accomplishments noted above – reflects a shift in focus to emphasize a standardized approach to school capacity management, an efficient balance of staff and consultant services and a robust interface with the local governments and the community. In particular, the consultant scope of work would include four primary assignments for the Consultant Team.

Implementation of the Interlocal Agreement  
Update and refinement of the Geodatabase  
Annual Assessment  
Residential Development Review

## **ASSIGNMENT 1: ILA IMPLEMENTATION**

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 31<sup>st</sup>. 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 1<sup>st</sup> 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).*

**TASK 1.1: PARTICIPATION IN MEETINGS.** BLCINC will participate in meetings required by the ILA and other meetings as may be required related to implementation of the ILA.

**TASK 1.1.1: STAFF WORKING GROUP WORKSHOP.** BLCINC will participate in a workshop with the SRCSD staff, Staff Working Group and others identified by the project manager as required by the ILA (March).

**TASK 1.1.2: OTHER MEETINGS, WORKSHOPS, HEARINGS.** BLCINC will participate in meetings, workshops and hearings as dictated by the work program and directed by the project manager

### **TASK 1.2: MODIFICATION OF THE INTERLOCAL AGREEMENT / COMPREHENSIVE PLANS**

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 2016, BLCINC reviewed the Interlocal Agreement and the comprehensive plan of the Santa Rosa County. Recommendations have been provided primarily to restore SRCSD review, comment and monitoring of rezoning, site plans and subdivision plans. A similar analysis of the comprehensive plans for Gulf Breeze, Milton and Jay will be provided under this scope.

**TASK 1.2.1: IMPORT/ REVIEW/AMENDMENT OF SANTA ROSA COUNTY COMPREHENSIVE PLAN**

BLCINC has previously conducted this review of the Santa Rosa County Comprehensive Plan with recommendations for amendment

**TASK 1.2.2: IMPORT/ REVIEW/AMENDMENT OF MILTON COMPREHENSIVE PLAN**

BLCINC will review the Milton Comprehensive Plan and provide recommendations for public school-related amendments.

**TASK 1.2.3: IMPORT/ REVIEW/AMENDMENT OF GULF BREEZE COMPREHENSIVE PLAN**

BLCINC will review the Gulf Breeze Comprehensive Plan and provide recommendations for public school-related amendments.

**TASK 1.2.4: IMPORT/ REVIEW/AMENDMENT OF JAY COMPREHENSIVE PLAN**

BLCINC will review the Jay Comprehensive Plan and provide recommendations for public school-related amendments.

**TASK 1.2.5: CONSULTATION / ASSISTANCE TO LOCAL GOVERNMENTS REGARDING ILA REVISIONS / COMPREHENSIVE PLAN AMENDMENTS.** BLCINC will provide consultation and assistance to the local governments regarding recommended modifications to the Interlocal Agreement and to the local government comprehensive plans and land development regulations. This assistance will include the provision of draft language, an interactive exchange of comment and review from the local governments and the incorporation of appropriate revisions prior to public review.

## **ASSIGNMENT 2: ANNUAL ASSESSMENT**

BLCINC would be responsible for production and update of an Annual Assessment. This deliverable would include an annual report accompanied by visual presentation materials (powerpoint) suitable for public officials and the general public.

The purpose of the Annual Assessment is to document the link between the residential growth of the community with the capacity of school facilities required to support that growth. The following components would be included:

- Development activity
  - Comp Plan / Rezoning Modifications
  - Site Plan / Subdivision activity
  - Residential building permit activity
  - Student Generation Multipliers
- Student Enrollment
  - Actual enrollment
  - Update and evaluation of enrollment projections
- Enrollment vs Capacity comparisons
  - Identify capacity needs indicated by enrollment projections

This scope anticipates that the Annual Report would be published and presented in January 2018 and reflect activity during 2017. This timing would incorporate the geodatabase update, the most recent COFTE and BEBR projections and the 2017-2018 Five Yr District Facilities Plan.

### **TASK 2.1: ESTABLISHMENT OF TRACKING AND ANALYTICAL TOOLS**

BLCINC will prepare EXCEL and GIS tools designed to facilitate the documentation and tracking of (1) school capacity and enrollment data and (2) development activity.

### **TASK 2.2: IMPORT AND TRACKING OF SCHOOL DATA**

The SRCSD staff will provide data related to school capacity and school enrollment. BLCINC will document and track this data for annual assessment purposes

#### **TASK 2.2.1: SCHOOL ENROLLMENT**

The SRCSD staff will update student enrollment by school on a monthly basis. BLCINC will document and track this data for annual assessment purposes.

#### **TASK 2.2.2: SCHOOL CAPACITY**

The SRCSD staff will advise BLCINC of school capacity changes from that reported in the Five Year District Facility Plan. BLCINC will document and track this data for annual assessment purposes

**TASK: 2.2.3: IMPORT AND ANALYSIS OF COFTE ENROLLMENT PROJECTIONS**

COFTE Enrollment Projections are published by the Florida Department of Education in June of each year. Upon publication, BLCINC will analyze these projections, advise the SRCSD of its findings and document the projections for annual assessment purposes

**TASK 2.3: IMPORT AND TRACKING OF DEVELOPMENT TRENDS**

BLCINC will coordinate with the local governments to facilitate the timely reporting and documentation and development activity

**TASK 2.3.1: ESTABLISHMENT OF REPORTING PROTOCOLS**

BLCINC will collaborate with the local governments to establish protocols for the timely reporting of development activity.

**TASK 2.3.2: IMPORT / ANALYSIS / TRACKING OF DEVELOPMENT TRENDS**

Using established protocols, BLCINC will import and document development data. BLCINC will ensure that imported development data is available for review and periodically provide the SRCSD with updates. BLCINC will advise the SRCSD of development events that may impact school enrollment.

**TASK 2.3.3: ANNUAL REPORT**

BLCINC will prepare an Annual Report in January 2018 summarizing school and development activity for 2017.

**TASK 2.3.4: PRESENTATION OF ANNUAL REPORT**

BLCINC will present the Annual Report following its publication.

### **ASSIGNMENT 3: UPDATE AND REFINEMENT OF "SCHOOL FACILITIES PLANNING GEODATABASE"**

The Geodatabase has been largely standardized lending itself to the annual update of key data. The following components should be updated on an annual basis.

- Student addresses (addresses provided by the SRCBS and geocoded by DRMP)
- Parcel data showing the number and type of dwelling units by parcel
- Address data for each dwelling units (standardized)
- Residential development activity from local governments

Standardization of format and agreement regarding a schedule of updates is a key objective

DRMP would be primarily responsible for updating and maintaining the Geodatabase

#### **TASK 2.1: PROTOCOL FOR GIS DATA MANAGEMENT**

BLCINC will collaborate with DRMP to refine the "School Facilities Planning Geodatabase" (SFPG) to achieve consistency of content, nomenclature and format and the timing and format of data transfer, update and maintenance. This task anticipates consultation with Santa Rosa County and other agencies regarding the format and transfer of pertinent data.

#### **TASK 2.2: PROTOCOL FOR DEVELOPMENT DATA TRANSFER**

BLCINC will collaborate with DRMP, local governments and the property appraiser to refine the protocols for the transfer of key GIS data.

**TASK 2.3: UPDATE OF THE "SCHOOL FACILITIES PLANNING GEODATABASE"**. BLCINC will collaborate with DRMP to update the SFPG

The SFPG will meet the following specifications:

- Utilizes ARC GIS technology
- At a minimum, includes the following GIS layers imported from public sources:
  - Most recent Santa Rosa County Property Appraiser files to include *parcels, parcel pin numbers, use code (puse), 911 address points, and building footprints*;
  - Most recent files from public sources to include county boundary, municipal boundaries, *extraterritorial boundaries, road centerlines, railroads, waterbodies and other natural features*;
  - School data to include *school location (type, capacity, enrollment), school attendance zones (elementary, middle & high), school concurrency service areas (elementary, middle & high)*;
  - Future Land Use Map(s) for Alachua County and all municipalities;
  - Zoning Map(s) for Alachua County and all municipalities;
- Includes a current point file for student addresses

- Residential development data (development orders, permits and certificates of occupancy) for past year for all jurisdictions;

#### **TASK 2.4: REDISTRICTING / SCHOOL SITING MODEL**

*BLCINC and DRMP will collaborate to develop a model using the existing geodatabase. The following components are anticipated.*

- *Key Data*
  - *School Facilities / Sites*
  - *School Zones (Elementary / Middle/ High)*
  - *Student geocoding (most current)*
  - *Residential Parcels / Number of dwelling units*
  - *Development activity (Site Plans / Subdivision / Permits)*
  - *Development potential of vacant lands*
  - *Transportation network*
- *Key Output*
  - Existing District Profiles
  - Existing / Active Residential by type
  - Existing / Active Residential by Distance
  - Existing / Active Residential by vehicle miles
  - Students / Student Equivalent
    - By Distance
    - By Vehicle Miles
  - Vacant Lands
    - Comp Plan – Vested
    - Rezoning - Vested
- *Model Results*
  - Residential Units / Student Equivalent
    - By Distance
    - By Vehicle Miles
    - Enroll / Capacity Relationship
  - Potential Residential Units / Student Equivalent
    - By Distance
    - By Vehicle Mile
    - Enroll / Capacity Relationship
  - Recalculate all output with district boundary adjustment

##### **TASK 2.4.1: REDISTRICTING / SCHOOL SITING MODEL DESIGN.**

BLCINC will collaborate with DRMP to develop a model design.

##### **TASK 2.4.2: IMPORT OF GIS DATA**

DRMP will import GIS data into a Geodatabase supporting the model.

##### **TASK 2.4.3: TEST APPLICATION**

BLCINC will collaborate with DRMP and the SCRSD staff to test the model design. The area or site to be used will be selected by the SCRSD staff.

**TASK 2.4.4: APPLICATION AS NEEDED**

The model will be applied as directed by the SRCSD staff. A separate scope and budget will be required for each application.

#### **ASSIGNMENT 4: PLAN REVIEW / DEVELOPMENT REVIEW**

A robust interaction with the Santa Rosa County, Milton, Gulf Breeze and Jay regarding the impact of development activity on public schools is desired. While the ability to link residential activity to capacity needs has been greatly improved through the previous work, the opportunity for the School Board to be at the table during the design of residential projects generally and the design of all projects that potentially impact the function and operation of schools is a critical next step. The policy and procedural structure for this interaction has been advanced but has not yet been fully implemented.

BLCINC is uniquely qualified to serve in a liaison function on behalf of the School Board and as an extension of the Assistant Superintendent for Administrative Services. This assignment would address the following areas of interest;

- Comprehensive Plan Amendments
  - Residential Units / Student Equivalents
  - Impact on Capacity
  - Capacity enhancement Agreements
- Rezoning
  - Residential Units / Student Equivalents
  - Impact on Capacity
  - Capacity Enhancement Agreements
  - Site Plan / Subdivision Design (If PD)
  - Functional / Operational Impacts (If PD)
- Site Plan / Subdivision Review
  - Residential Units / Student Equivalents
  - Impact on Capacity
  - Proportionate Share Agreements
  - Direct Impacts
    - Circulation
    - Safe Routes
    - Stormwater
    - Bus Operation
    - Safety / Security
    - Compatibility
- Residential Permit Tracking
  - Continuous monitoring of residential building / occupancy permits

#### **TASK 4.1: REGULATORY PROCEDURES / RECOMMEND SCHOOL-RELATED ADJUSTMENTS**

Each local government has established procedures for the review of comprehensive plan amendments, rezoning, subdivisions, site plans and other development approvals. Effective review and comment regarding school-related issues requires an understanding of these procedures.

BLCINC will assist the local governments with the development of procedures, informational materials and forms that facilitate the SRCSD review of comprehensive plan amendments, rezoning, site plans and subdivision plans.

**TASK 4.1.1: SANTA ROSA COUNTY REGULATORY PROCEDURES**

BLCINC will review the regulatory procedures of Santa Rosa County and provide recommendations for timely and efficient review by the SRCSD.

**TASK 4.1.2: MILTON REGULATORY PROCEDURES**

BLCINC will review the regulatory procedures of the City of Milton and provide recommendations for timely and efficient review by the SRCSD.

**TASK 4.1.3: GULF BREEZE REGULATORY PROCEDURES**

BLCINC will review the regulatory procedures of the City of Gulf Breeze and provide recommendations for timely and efficient review by the SRCSD.

**TASK 4.2: SCHOOL RELATED REGULATIONS**

The land development regulations of each local government have important implications for public schools. These regulations require examination to identify school-related provisions and to evaluate their appropriateness. Based on the evaluation, recommendations would be made regarding modifications and / or the development of supplemental standards.

**TASK 4.2.1: SANTA ROSA COUNTY SCHOOL-RELATED REGULATIONS / STANDARDS**

BLCINC will review the land development regulations of Santa Rosa County to identify school-related provisions and to evaluate their appropriateness. Recommendations may include modifications and / or the addition of supplemental standards.

**TASK 4.2.2: MILTON SCHOOL-RELATED REGULATIONS / STANDARDS**

BLCINC will review the land development regulations of the City of Milton to identify school-related provisions and to evaluate their appropriateness. Recommendations may include modifications and / or the addition of supplemental standards.

**TASK 4.2.2: GULF BREEZE SCHOOL-RELATED REGULATIONS / STANDARDS**

BLCINC will review the land development regulations of the City of Gulf Breeze to identify school-related provisions and to evaluate their appropriateness. Recommendations may include modifications and / or the addition of supplemental standards.

### **TASK 4.3: SCHOOL CAPACITY / ENROLLMENT DATA FOR DEVELOPMENT REVIEW**

Current related data is essential for the effective and efficient review of development proposals.

#### **TASK 4.3.1: STUDENT GENERATION MULTIPLIERS**

BLCINC will ensure that the most recent Student Generation Multipliers (SGM) are available to each local government.

#### **TASK 4.3.2: CAPACITY ENROLLMENT PROFILES FOR ESAs / ATTENDANCE ZONES**

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 each ESA and attendance zone.

Using the available data, BLCINC will prepare profiles of the ESAs and attendance zone and categorize each into elementary, middle and high school levels.

### **TASK 4.4: COMPREHENSIVE PLAN / REZONING REVIEW**

The adopted ILA provides for the review of comprehensive plan amendments by the SRCSD. The modified ILA will expand this review to rezoning

#### **TASK 4.4.1: REVIEW CRITERIA AND PROCEDURES.**

BLCINC will prepare criteria and procedures for Plan Review consistent with the modified ILA.

#### **TASK 4.4.2: PLAN REVIEW SUPPORT**

BLCINC will review comp plan amendments and rezoning submitted by the local governments during the duration of this agreement. BLCINC will report the results of each Plan Review to the Project Manager

### **TASK 4.5 SITE PLAN / SUBDIVISION REVIEW**

The modified ILA provides for the review of site plans and subdivisions for school-related impact and for capacity / enrollment tracking and projection.

#### **TASK 4.5.1: REVIEW CRITERIA AND PROCEDURES.**

BLCINC will prepare criteria and procedures for Site Plan / Subdivision review consistent with the modified ILA.

#### **TASK 4.5.2: SITE PLAN / SUBDIVISION REVIEW SUPPORT**

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

## Budget & Payment Schedule

Assignment 1: ILA Implementation	\$ 4,000
Assignment 2: Annual Assessment	\$ 12,500
Assignment 3: Geodatabase Update	\$ 5,000
Assignment 4: Development Review	\$ 18,500
Total	\$ 40,000

## Projected Payment Schedule

ASSIGNMENT	2017		2018			
	3 <sup>RD</sup> QTR	4 <sup>TH</sup> QTR	1 <sup>ST</sup> QTR	2 <sup>ND</sup> QTR	3 <sup>RD</sup> QTR	4 <sup>TH</sup> QTR
ILA IMPLEMENTATION	\$3,000	\$0	\$1,000			
ANNUAL ASSESSMENT		\$3,000	\$5,000	\$1,500	\$1,500	\$1,500
GEODATABASE UPDATE		\$2,000	\$3,000			
DEVELOPMENT REVIEW	\$7,000	\$3,000	\$4,000	\$1,500	\$1,500	\$1,500
TOTAL	\$10,000	\$8,000	\$13,000	\$3,000	\$3,000	\$3,000