

**SANTA ROSA COUNTY SCHOOL DISTRICT  
SCHOOL IMPACT FEE ANALYSIS  
SCOPE OF SERVICE  
October 15, 2018 – December 31, 2018**

Oct. 16<sup>th</sup>

**BUILDING LIVABLE COMMUNITIES, INC**

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. James C. Nicholas, PhD - - a recognized authority in the application of school impact fees in Florida - will serve in an advisory capacity.

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;
- A draft ordinance establishing a "School Impact Fee" program suitable for adoption by Santa Rosa County; and
- A draft interlocal agreement for the collection and administration of school impact fees.

**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: Report Template ready for insertion of current data**

### **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 (developed by DRMP using September 2018 student counts) with housing type data maintained by the property appraiser (current through August 2018). 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 2018-19 FIVE YEAR DISTRICT FACILITIES.**

BLCINC will import all relevant financial and school related data from the 2018-2019 Five Year District Facilities Plan effective October 1, 2018. 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 – in consultation with Dr. James Nicholas – 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: Draft Implementing Ordinance**

BLCINC will – in consultation Dr James Nicholas – provide a draft implementing ordinance reflecting best practices and customized for application in Santa Rosa County.

**Deliverable: Draft Implementing Ordinance**

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

Impact fees are collected at the time a 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, etc..

BLCINC – in consultation with Dr James Nicholas – provide a draft Interlocal agreement reflecting best practice and customized by application in Santa Rosa County.

#### **Deliverable: Draft Interlocal Agreement**

### **ASSIGNMENT 4: STRATEGY FOR SCHOOL IMPACT FEE PROGRAM**

With the tools and information provided in in Assignments 1, 2 and 3, certain decisions are required with regard to how the program will be structured. Most notably, the impact fee assessment itself must be determined (cannot exceed the maximum allowable). Secondly, is the impact fee to be applied uniformly districtwide or will geographic distinctions be incorporated.

BLCINC will

1. consult with the SRCSB and the local governments to develop this underlying strategy; and
2. Modify the implementing ordinance and interlocal agreement to reflect the desired strategy.

#### **Deliverable: Modified Implementing Ordinance Modified Interlocal Agreement**

### **ASSIGNMENT 5: 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**

|   |                  |
|---|------------------|
| <b>Assignment 1: Report</b>               | <b>\$ 8,500</b>  |
| <b>Assignment 2: Ordinance</b>            | <b>\$ 1,250</b>  |
| <b>Assignment 3: Interlocal Agreement</b> | <b>\$ 1,000</b>  |
| <b>Assignment 4: Strategy</b>             | <b>\$ 2,750</b>  |
| <b>Assignment 5: Presentation</b>         | <b>\$ 1,500</b>  |
| <b>Total</b>                              | <b>\$ 15,000</b> |