

**SANTA ROSA COUNTY SCHOOL DISTRICT
SCHOOL PLANNING
2019-2020 SCOPE OF SERVICE
July 11, 2019 – June 30, 2020**

BUILDING LIVABLE COMMUNITIES, INC

During 2015, 2016, 2017, 2018 and the first half of 2019, 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 – emphasizes 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 31st. ILA Section 2.2 requires submittal of the draft Five Year Plant Survey 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.*

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 workshops with the SRCSD staff, Staff Working Group and others identified by the project manager as required by the ILA.

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: IMPLEMENTATION OF THE INTERLOCAL AGREEMENT

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.

TASK 1.2.1: CONSULTATION / ASSISTANCE TO LOCAL GOVERNMENTS REGARDING ILA REVISIONS / COMPREHENSIVE PLAN AMENDMENTS / LAND DEVELOPMENT REGULATIONS. 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 will 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 (provided by the SRCSB staff)
 - 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 presented during the first quarter of 2020 (date to be determined) and reflect activity during 2019. This timing would incorporate the geodatabase update, the most recent COFTE and BEBR projections and the 2019-2020 Five Yr District Facilities Plan.

TASK 2.1: UPDATE OF TRACKING AND ANALYTICAL TOOLS

BLCINC will update EXCEL and GIS tools designed to facilitate the documentation and tracking of (1) school capacity and enrollment data and (2) development activity. An extensive work task was undertaken in June of 2019 to enhance the organization and content of the Geodatabase to support a more robust analysis of residential development.

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 and development review 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 and development review

TASK 2.2.2: SCHOOL CAPACITY

The SRCSD staff will advise BLCINC of school capacity changes from that reported in the 2018-2019 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 2.3.2: 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.

TASK 2.3.3: CALCULATION/ MAINTENANCE OF "PROPORTIONATE SHARE" DATA FOR NEW AND PROJECTED RESIDENTIAL DEVELOPMENT.

In 2019, BLCINC completed a "Public Educational Facility Funding Analysis" that established the "Proportionate Share" of housing types for the capital cost of required capacity. This data was based upon financial information contained in the 2018-2019 Five Year District Facilities Plan.

Annual updates of "Proportionate Share" data is desired for planning and development review purposes. BLCINC has developed an EXCEL spreadsheet designed to receive data from the 2019-2020 Five Year District Facilities Plan and recalculate "proportionate share". This data will be incorporated into the profiles and supporting data.

TASK 2.3.4: ANNUAL ASSESSMENT

BLCINC will prepare an Annual Assessment in January 2020 summarizing school and development activity for 2019.

TASK 2.3.5: PRESENTATION OF ANNUAL ASSESSMENT

BLCINC will present the Annual Assessment to the SRCSB during the first quarter of 2020

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 SRCSB 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

TASK 3.1: UPDATE OF THE "SCHOOL FACILITIES PLANNING GEODATABASE". BLCINC will coordinate with DRMP for update and maintenance of 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), and address points*;
 - 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 for all jurisdictions

The SFPG was fully updated and enhanced in June 2019.

TASK 3.2: UPDATE AND MAINTAIN THE SFPG DURING THE 2019-2020 PLANNING PERIOD.

As new or amended information is received during the duration of this contract, BLCINC will update the SFPG to reflect the most current conditions.

TASK 3.3: GIS ORIENTATION FOR SRCSD STAFF

The SRCSB is seeking to expand internal staff capacity for school capacity planning. This enhancement would include the addition of professional staff and the in house use of GIS technology.

BLCINC will facilitate the transfer / sharing of GIS technology for application by the SRCSB staff and provide orientation and training regarding the use of the tools and data.

Upon the purchase and installation of the required software, BLCINC will provide the Geodatabase and related data for uploading. BLCINC will in addition provide an introduction and orientation for SRCSD staff in the operation and application of the software and its application

ASSIGNMENT 4: PLAN REVIEW / DEVELOPMENT REVIEW

A proactive interaction with Santa Rosa County, Milton, Gulf Breeze and Jay regarding the impact of development activity on public schools is desired. 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 an essential component.

BLCINC will provide 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 / 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.

TASK 4.1.1: Coordinate Regulatory Procedures with Local Governments. 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 4.2: SCHOOL CAPACITY / ENROLLMENT DATA FOR DEVELOPMENT REVIEW

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

TASK 4.2.1: STUDENT GENERATION MULTIPLIERS

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

TASK 4.2.2: CAPACITY ENROLLMENT PROFILES FOR ESAs / ATTENDANCE ZONES / PRIMARY SERVICE AREAS

Each Educational Service Area (ESA) and each school attendance zone has a unique development profile. In addition, a primary service area has been identified (GIS analysis) based upon travel distance (2 miles for elementary, 4 miles for middle and 5 miles for high).

Using the available GIS and other data, BLCINC will document profiles of the ESAs, attendance zones and primary service area and categorize each into elementary, middle and high school levels. These profiles will serve as supporting data for develop

TASK 4.3: COMPREHENSIVE PLAN / REZONING / SITE PLAN REVIEW

The adopted ILA provides for the review of comprehensive plan amendments by the SRCSD. This review is expanded to include rezonings and subdivision/ site plan review by agreement

TASK 4.3.1: PLAN 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.

BLCINC will maintain a record of all Plan Review activities.

Budget & Payment Schedule

Basic Services

Assignment 1: ILA Implementation	\$ 6,000
Assignment 2: Annual Assessment	\$ 12,500
Assignment 3: Geodatabase Update	\$ 8,000
Assignment 4: Development Review Mgmt.	\$ <u>8,500</u>
Total	\$ 35,000

Plan Review as Needed

Assignment 4: Plan Reviews	\$ 5,000
\$ 500 per review	

Projected Payment Schedule

Assignment	2019		2020	
BASIC SERVICES				
ILA IMPLEMENTATION	\$3,000	\$1,000	\$1,000	\$1,000
ANNUAL ASSESSMENT	\$6,000	\$4,000	\$2,500	
GEODATABASE UPDATE	\$7,000	\$1,000		
PLAN REVIEW MGMT	\$5,500	\$1,000	\$1,000	\$1,000
TOTAL BASIC SERVICES	\$21,500	\$7,000	\$4,500	\$2,000
PLAN REVIEW (PER REVIEW)	\$1,000	\$1,500	\$1,500	\$1,000
TOTAL	\$22,500	\$8,500	\$6,000	\$3,000