

**ORDINANCE NO. 2008-058**

AN ORDINANCE OF THE COUNTY OF SARASOTA, FLORIDA, PROVIDING FOR FINDINGS; PROVIDING FOR THE AMENDMENT (2008-01-C) OF THE SARASOTA COUNTY COMPREHENSIVE PLAN AS ADOPTED BY SARASOTA COUNTY ORDINANCE NO. 89-18, AS AMENDED; PROVIDING FOR FINDINGS; PROVIDING FOR DEFINITIONS; PROVIDING FOR THE ADOPTION OF AMENDMENT 2008-01-C TO THE SARASOTA COUNTY COMPREHENSIVE PLAN BY AMENDING THE PRIMARY COMPONENTS OF THE PUBLIC BUILDINGS AND RELATED FACILITIES CHAPTER PURSUANT TO CHAPTER 2005-98 LAWS OF FLORIDA BY CREATING A NEW CHAPTER 12: PUBLIC SCHOOL FACILITIES; REVISING THE CAPITAL IMPROVEMENTS CHAPTER AND THE INTERGOVERNMENTAL COORDINATION CHAPTER BY AMENDING GOALS, OBJECTIVES, AND POLICIES; AND AMENDING OTHER SUCH PORTIONS OF THE PLAN AND OTHER SUPPORTIVE MATERIAL AS DEEMED NECESSARY IN ORDER TO MAINTAIN INTERNAL CONSISTENCY; PROVIDING FOR INTERPRETATION; PROVIDING FOR EFFECT ON OTHER ORDINANCES AND REGULATIONS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

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BOARD RECORDS  
FILED FOR RECORD

BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF SARASOTA COUNTY, FLORIDA:

Section 1. Findings. The Board of County Commissioners hereby makes the following findings:

(a) Pursuant to Article VIII, Section 1(g) of the Constitution of the State of Florida, the Sarasota County Home Rule Charter, and the Local Government Comprehensive Planning and Land Development Regulation Act, Chapter 163, Part II, Florida Statutes, as amended, (the Act), Sarasota County is authorized and required to adopt a comprehensive plan.

(b) Sarasota County Ordinance No. 76-51, as amended, designated the Sarasota County Planning Commission as the Local Planning Agency and provided for the preparation and recommendation of a comprehensive plan and amendments thereto by the Sarasota County Planning Commission and the adoption of a comprehensive plan and amendments thereto by the Board of County Commissioners in accordance with the provisions of the Act.

(c) The Sarasota County Planning Commission, acting as the Local Planning Agency for Sarasota County, held a duly advertised public hearing on July 19, 2007 and recommended approval of proposed Comprehensive Plan Amendment 2008-01-C, and recommended approval of the amendment to the Board of County Commissioners of Sarasota County.

(d) The Board of County Commissioners of Sarasota County held a duly advertised public hearing on October 9, 2007 to receive public comment on the proposed amendment to *The Sarasota County Comprehensive Plan*.

(e) Following the public hearing, the Board of County Commissioners of Sarasota County approved the transmittal of the proposed amendment (2008-01-C) to state, regional and local agencies for review and comment on January 10, 2008.

(f) Said proposed amendment as approved for transmittal by the Board of County Commissioners of Sarasota County, together with supporting documentation, was transmitted to the Florida Department of Community Affairs and the various agencies and governments as appropriate for review and comment in accordance with the provisions of the Act and Rule 9J-11.006.

(g) The Florida Department of Community Affairs reviewed the proposed plan amendment (2008-01-C) for consistency with Chapter 163, Florida Statutes and Rule 9J-5, Florida Administrative Code and in its report dated March 14, 2008, raised one objection to the proposed amendment.

(h) The Board of County Commissioners of Sarasota County held a duly advertised adoption public hearing on April 23, 2008, to receive public comment on the proposed amendment to *The Sarasota County Comprehensive Plan*.

Section 2. Definitions. For the purpose of this Ordinance, the following definitions shall apply:

(a) "Act" means the Local Government Comprehensive Planning and Land Development Regulation Act, Chapter 163, Part II, Florida Statutes, as amended.

(b) *The Sarasota County Comprehensive Plan* means the document adopted by the Board of County Commissioners and filed with the Clerk of said Board pursuant to Sarasota County Ordinance No. 89-18, as amended.

(c) "Board" means the Board of County Commissioners of Sarasota County, Florida.

Section 3. Adoption of Amendment 2008-01-C to *The Sarasota County Comprehensive Plan*. The Board of County Commissioners of Sarasota County hereby adopts Amendment 2008-01-C to *The Sarasota County Comprehensive Plan* pursuant to and in compliance with the Local Government Comprehensive Planning and Land Development Regulation Act, Chapter 163, Part II, Florida Statutes.

(a) 2008-01-C amends the primary components of the Public Buildings and Related Facilities Chapter pursuant to Chapter 2005-98 Laws of Florida by creating a new Chapter 12: Public School Facilities; revising the Capital Improvements Chapter and the Intergovernmental Coordination Chapter by amending goals, objectives, and policies; and amending other such portions of the plan and other supportive material as deemed necessary in order to maintain internal consistency.

(b) The amendment in its entirety is provided in Exhibit "A" attached hereto and made a part thereof.

Section 4. Interpretation.

(a) In the event of any inconsistency between the provisions of the amendment provided for herein and other provisions of *The Sarasota County Comprehensive Plan*, the provisions of this amendment shall supersede and control over any other such inconsistent provision.

(b) The language and provisions of this ordinance and *The Sarasota County*

*Comprehensive Plan* shall be construed in pari materia with Chapter 163, Part II, Florida Statutes, and Chapter 9J-5, Florida Administrative Code.

(c) Except where specifically indicated to the contrary, where any provision of this Ordinance refers to or incorporates another provision, ordinance, statute, code, regulation, or other authority, it refers to the most current version of the other provision, ordinance, statute, code, regulation, or other authority, including any subsequent amendments thereto or renumbering thereof.

Section 5. Effect on Other Ordinances and Regulations. Where this ordinance conflicts with another County ordinance, the provisions of this ordinance shall prevail to the extent of such conflict except as otherwise provided herein.

Section 6. Severability. It is declared to be the intent of the Board that if any provision of this ordinance is for any reason finally held invalid or unconstitutional by any court of competent jurisdiction, such provision shall be deemed a separate, distinct and independent provision and such holding shall not affect the validity of the remaining provisions.

Section 7. Effective Date. The effective date of this plan amendment shall be the date a final order is issued by the Department of Community Affairs or Administration Commission finding the amendment in compliance in accordance with Section 163.3184(1)(b), Florida Statutes, whichever is applicable. No development orders, development permits, or land uses dependent on this amendment may be issued or commence before it has become effective. If a final order of noncompliance is issued by the Administration Commission, this amendment may nevertheless be made effective by adoption of a resolution affirming its effective status, a copy of which resolution shall be sent to the Florida Department of Community Affairs, Division of Community Planning, Plan Processing Team.

PASSED AND DULY ADOPTED BY THE BOARD OF COUNTY COMMISSIONERS OF SARASOTA COUNTY, FLORIDA, this 13 day of May, 2008.

BOARD OF COUNTY COMMISSIONERS  
OF SARASOTA COUNTY, FLORIDA

By:

  
Shannon Staub, Chair

ATTEST:

KAREN E. RUSHING, Clerk of the  
Circuit Court and Ex-Officio Clerk  
of the Board of County Commissioners  
of Sarasota County, Florida

By:

  
Deputy Clerk

## EXHIBIT A

### Chapter 5-12

### Public Schools Facilities

#### **Introduction**

Schools can act as an anchor in the community. They are a symbol of a neighborhood's stability and ~~serve~~ attract families in ~~to~~ the community. They transmit knowledge to new generations, advance knowledge, display the achievements of society, plus bring neighbors together for PTA meetings, school plays, and soccer games. They offer their classrooms and media centers to residents for adult education classes, community and club meetings. They are key determinants of the quality of life and are valued symbols of community identity and achievement. The entire community benefits from schools. Moreover, the community is often evaluated on the basis of the quality of its schools. The planning process that guides decision-making on school size, location, and programs should, therefore, be coordinated with the process that guides all community development.

Planning for school facilities is one of the responsibilities of the local School Board. In the past, it was often a separate process from local government planning. The proper functioning and the best distribution of schools are possible only when school planning is coordinated with the larger process of community planning for growth and change. Recognizing this fact, Sarasota County Government, in cooperation and coordination with the School Board of Sarasota County (School Board), ~~has sought to~~ incorporated public schools in the framework of the Comprehensive Plan in the 1996 EAR based amendment of the comprehensive plan by including schools in the Public Buildings and Related Facilities Chapter. This was further refined in the 2006 EAR based amendment of the comprehensive plan. ~~Currently there is no specific regulatory mandate that all public school Levels of Service be met prior to the issuance of a development order and permit, pursuant to the provisions of Rule 9J-5.0055(1)(a).~~ Based on recent legislation, school concurrency requirements are now required by Florida Statutes, Sections 163.3177(6)(h), 163.3177 (12), 163.31777, and 163.3180(13) will be established and phased in by December 2008. Sarasota County ~~will~~ established a school concurrency structure through partnership with the School Board and local municipalities. ~~The State has recognized Sarasota's County ability to pilot such a regulatory structure during this interim period.~~

The following sections present the standards with which the School Board evaluates school facilities; an inventory of existing facilities and planned future facilities; an evaluation of the school system based on these standards and determination of need; an analysis of funding; an analysis of coordination between school planning and local land use planning; and Objectives and Policies for such coordination.

## Guidelines for the Development of Schools

The Educational Facilities Plant Survey, a school district's official list of approved projects, is required by the State at least every five years. Sarasota County School's latest survey was ~~done in 1999 and extended last year until September~~ completed in 2005. ~~During the summer of 2005, the School Board will approve the survey currently underway. The information in the following sections rely on the 1999 survey for official data and agreed upon projected items for the near future have been added.~~

According to the State Requirements for Educational Facilities (SREF) Educational Facilities Survey, a school site should be adequate to address existing needs based on school programs and enrollment and to allow economical future expansion and development. The choice of sites for new schools is of critical importance in the overall development of a school facilities program. New sites should be located to minimize transportation and infrastructure costs and should be sized so that they provide adequate space for school buildings, stormwater retention, off street parking, queuing for parent and bus loading and unloading, and playground areas.

~~The Educational Facilities Survey~~ SREF presents minimum space requirements based on program needs, pursuant to Rule A-2.032, Florida Administrative Code, Size of Space, and Occupant Design Capacity Criteria. The minimum space requirements include student capacity, student stations, gross square footage of buildings, and facilities' utilization. Student capacity is the maximum number of students a school facility is designed to accommodate. A student station is the area necessary for a student to engage in learning activities, and varies with particular types of activities. It is a measure of the use of space in schools.

According to SREF State criteria, student capacity in elementary schools can be equated to the number of student stations, since elementary school students are assigned to one classroom throughout the day. In secondary schools (middle and high), however, students move from classroom to classroom depending on their subjects. Scheduling then becomes a factor in calculating capacity as well as the number of students and student stations. Therefore, utilization factors have been established in determining capacity.

According to SREF the Educational Facilities Survey, the optimum size of elementary schools is 600-800 students. It is educationally and economically desirable for an elementary school to be large enough to justify a full time principal, a librarian, and instructional and clerical services. The optimum size for middle schools is 1,000-1,200 students, and for high schools, it's 1,800-2,000 students.

The School Board has indicated that the operation and administration of larger schools is more economically feasible than smaller schools, so long as the educational standards are maintained. Therefore, in order to guide its facilities planning efforts, the School Board has adopted the following minimum space requirements, which are higher than those suggested ~~recommended~~ by the State:

**Elementary Schools (Grades Pre-K - 5)**

Student Capacity	<u>1,040 970</u> (State: 600 - 800)
Student Stations	<u>1,040 970</u> (State: 600 - 800)
Gross sq. ft.	<u>137,866</u>
Utilization	<u>100%</u>
<u>Program Capacity</u>	<u>863</u>

**Middle Schools (Grades 6-8)**

Student Capacity	<u>1,080 4398</u> (State: 900 - 1,080)
Student Stations	<u>1,200 1553</u> (State: 1,000 - 1,200)
Gross sq. ft.	<u>234,334</u>
Utilization	<u>90%</u>
<u>Program Capacity</u>	<u>1,026</u>

**High Schools (Grades 9-12)**

Student Capacity	<u>2,818 2214</u> (State: 1,620 -1,800)
Student Stations	<u>2,966 2331</u> (State: 1,800 -2,000)
Gross sq. ft.	<u>361,465</u>
Utilization	<u>95%</u>
<u>Program Capacity</u>	<u>2,536</u>

Sarasota County School District reports capacity to the Department of Education using the standards of the Florida Inventory of School Houses (FISH). FISH capacity is reported in two ways, including: satisfactory student stations for permanent facilities and relocatables (portables) and FISH capacity for permanent and relocatables adjusted by utilization. Sarasota County uses FISH capacity for reporting purposes to the Department of Education.

However, for the purposes of implementing school concurrency the Sarasota County School Board has directed District staff to use program capacity as an alternative method for measuring the capacity of schools. This capacity measure is a more exact means of reflecting the actual use of a school's space taking into account special needs students and special programs to determine the capacity of its schools. In some instances, specialized programs may be recognized as full-time classroom uses and, therefore, may add capacity to FISH. In other instances, program capacity may reduce FISH capacity. If these factors are not considered when discussing capacity, the result may be a mistaken impression that classrooms are being under- or over-utilized.

## **Inventory and Analysis**

In Sarasota County, elementary schools include pre-kindergarten through fifth grade (PK-5), middle schools include grades 6-8, combination elementary and middle schools include grades K-8, and high schools, grades 9-12. As of ~~2004~~ 2007, Sarasota County had ~~twenty-one~~ elementary schools, ~~seven~~ six middle schools, one combined elementary and middle school, five high schools, ~~six~~ eight special education purpose schools ~~eight and nine~~ charter schools; ~~and six~~ alternative schools. Figure ~~5-5~~ 12-1 presents the location of existing and planned School Board facilities. Currently, there are two schools planned in North Port in the next five years. The special education schools provide various other educational programs. For instance, Oak Park

specializes in the education of emotionally, physically and developmentally challenged students, while Pine View specializes in the education of gifted students. Other ancillary school related facilities such as school administration, technical training, and construction services are also depicted in Figure 5-5 12-1.

The ~~2007-08~~2004-05 student enrollment in Sarasota County's elementary, middle, high, and ~~non-traditional public~~ and special purpose schools was 40,12141,116 students. Student enrollment is projected to reach ~~40,913~~ 50,650 students in the ~~2011-12~~2009-10 school year, an overall increase of %23%. Table 5-6 12-1 illustrates the current and projected enrollment. The "~~Non-Traditional Special Purpose Schools~~" category includes special education, ~~and~~ alternative schools ~~and charter schools~~. In 2007, the school district reported a FISH capacity of the Sarasota County school system of 54,362.

**TABLE 12-1: CURRENT AND PROJECTED PUBLIC SCHOOL ENROLLMENT, SARASOTA COUNTY SCHOOLS, 2005-2010**

School Level	2004-05 Students	Projected 2009-10 Students	Change 2005-2010
Elementary (PK-5)	16,454	19,427	18%
Middle (6-8)	7,385	8,716	18%
High (9-12)	11,066	13,603	23%
Non-Traditional Schools	6,211	8,904	43%
<b>TOTAL</b>	<b>41,116</b>	<b>50,650</b>	<b>23%</b>

NOTE: Source: Sarasota County School Board, Long Range Planning, 2004

Concurrency Service Areas that coincide with the attendance zones of high, middle and elementary schools are also proposed. Because student assignment for special schools and charter schools is not limited by conventional attendance zone boundaries, their available capacity will be allocated district-wide or by other methods as appropriate to each special purpose school. To ensure that adequate school capacity is available level of service (LOS) standards based on program capacity are proposed for adoption as follows:

**TABLE 12-1: CURRENT AND PROJECTED PUBLIC SCHOOL ENROLLMENT,  
SARASOTA COUNTY SCHOOLS, 2007-2012**

<u>School Level</u>	<u>2007-08 Students</u>	<u>Projected 2011- 12 Students</u>	<u>Change 2007- 2012</u>
<u>Elementary (PK-5)</u>	<u>17,195</u>	<u>17,821</u>	<u>4%</u>
<u>Middle (6-8)</u>	<u>7,690</u>	<u>8,484</u>	<u>9%</u>
<u>High (9-12)</u>	<u>11,502</u>	<u>9,653</u>	<u>(19)%</u>
<u>Special Purpose Schools</u>	<u>3,734</u>	<u>4,951</u>	<u>25%</u>
<b>TOTAL</b>	<b>40,121</b>	<b>40,913</b>	<b>2%</b>

NOTE: Source: Sarasota County School Board, Long Range Planning; 2007

<u>CONCURRENCY SERVICE AREA</u>	<u>TYPE OF SCHOOL</u>	<u>LEVEL OF SERVICE STANDARDS</u>	
		<u>INITIAL</u>	<u>5 YEAR</u>
<u>Student Attendance Zone</u>	<u>Elementary</u>	<u>115%</u>	<u>±10-105% of permanent program capacity</u>
	<u>Middle</u>	<u>100±10%</u>	<u>±95-100% of permanent program capacity</u>
	<u>High</u>	<u>±10-105%</u>	<u>100% of permanent program capacity</u>
<u>District-wide</u>	<u>Special purpose</u>	<u>±95-100%</u>	<u>±95-100% of total program capacity</u>

~~Of the two new schools that were approved in the current 1999 Educational Facilities Survey, Cranberry Elementary opened in 2004 and Tatum Ridge Elementary will open in 2005. Not currently approved in the Educational Facilities Survey, but funded in the five year Capital Outlay Budget, are a fourth elementary and a second middle school in North Port.~~

~~The 1999 Survey approved major renovations at McIntosh Middle, Phillippi Shores Elementary, Venice Elementary, Wilkinson Elementary, Riverview High, Sarasota High, and Venice High. Those projects are completed or in the process of being completed. The 1999 Survey also approved the replacements of Phillippi Shores Elementary, Venice Elementary, and Wilkinson Elementary Schools, all of which are currently underway in 2005. The 1999 Survey also included classroom additions at Brentwood, Gocio, and Southside Elementary Schools and North Port High School.~~

Of the new schools that were approved in the current 2005 Educational Facilities Plant Survey, Lamarque Elementary opened in 2006, North Port's second middle school is under construction and will open in 2008, a North County Technical High School will open in 2008, and a South County Technical High School and North Port's fifth elementary school that will open in 2009.

The 2005 Survey approved major renovations at Garden Elementary, Gocio Elementary, Lakeview Elementary, Southside Elementary, Sarasota High, Pine View, and Venice High. Southside Elementary's project is complete. The 2005 Survey also approved the replacements of Riverview High and Venice High. Sarasota High and Pine View renovations are scheduled in 2009, Riverview High in 2010 and Bay Haven renovations in 2011. Start-up funds are included for Booker High and Venice High rebuilds and for a new special purpose school Oak Park South.

The ten year program includes major renovations at Garden, Gocio and Lakeview elementary schools and completion funds for Booker High and Venice High rebuilds and for new special purpose school, Oak Park South. The ten year program also includes additions to Ashton, Booker and Fruitville elementary schools. The ten year program also includes four new elementary and one new middle school.

The School Board has a Tentative Facilities Work Program FY05-07-08 through FY11-12 that includes capital projects to address new growth and renovations and improvements, as listed in Table 5-7 12-2.

**Table 12-2: Planned Public School Facilities**

**TABLE 5-7 12-2 PLANNED PUBLIC SCHOOL FACILITIES,  
SARASOTA COUNTY 2007/08-2011/12 2005-2010**

<b>Fiscal Year</b>	<b>Facility Name</b>	<b>Planned Activity</b>
		<b>New Capacity for Growth</b>
<del>2005</del>	<del>Tatum Ridge Elementary</del>	<del>New School</del>
<del>2005-06</del>	<del>North Port Lamarque Elementary</del>	<del>New School #4</del>
<del>2008-09</del> <del>2005-07</del>	North Port Middle <u>"EE"</u>	New School
<del>2009-10</del> <del>2006-09</del>	North Port Elementary <u>"I"</u>	New School #5
<del>2010-11</del> <del>2008-09</del>	Oak Park South* Start up Funds	New ESE School
<del>2010</del> <del>2008-09</del>	<u>North County Technical High School "BBB"</u>	New School
2009-10	South County Technical High School	New School

<del>2007-11</del> <del>2005-10</del>	Land Purchases	Land for New Schools
		<b>Renovations and Improvements</b>
<del>2005-06</del>	<del>Ashton Elementary</del>	<del>HVAC and Remodel</del>
<del>2007-08</del>	<del>Booker High</del>	<del>Renovations</del>
<del>2009-10</del>	<del>Garden Elementary</del>	<del>Classroom Wing</del>
<del>2005-07</del>	<del>Glenallen Elementary</del>	<del>Cafeteria, Art, and Music Rooms</del>
<del>2007-08</del>	<del>Gocio Elementary</del>	<del>Classroom Wing</del>
<del>2008-09</del>	<del>Lakeview Elementary</del>	<del>Cafeteria, Art, and Music Rooms</del>
<del>2005-07</del>	<del>North Port High</del>	<del>Classroom Wings</del>
<del>2007-11</del> <del>2005-10</del>	Portables and Relocatables	Through District As Needed
<del>2010-11</del> <del>2008-10</del>	Pine View	Renovations
<del>2010-11</del> <del>2005-08</del>	Riverview High	Rebuild
<del>2009-10</del> <del>2005</del>	Sarasota High	Renovation Improvement
<del>2011-12</del>	<del>Bay Haven</del>	<del>Renovations</del>
<del>2005-07</del>	<del>Southside Elementary</del>	<del>Additions Cafetorium</del>
<del>2005-07</del>	<del>Technical High and Sarasota Tech Inst</del>	<del>Renovations</del>
<del>2007-11</del> <del>2005-10</del>	Various Projects	<del>Various Wings and Other Small Projects</del>

Source: The School Board of Sarasota County, Capital Projects Plan, FY0507 - FY4012.

### **Funding**

**The five-year period extending from 2007-08 through 2011-12 anticipates the expenditure of \$634 million of which \$390 million (62%) is allocated to increase program capacity in the public**

school system. This expenditure is programmed to add 3,649 in program capacity. An additional 9,368 in program capacity is programmed for construction by 2017. The majority of this capacity will be in permanent facilities. The Five-Year Capital Facilities Plan also allocates \$212 million to the renovation of existing schools and general capital upgrades, including maintenance of the educational facilities.

The District has also projected its needs for the ten and twenty-year time period. Over the ten-year period, the District anticipates an additional \$804 million in expenditures for capacity enhancements. Over the twenty-year period from 2007-08 through 2026-27, the District projects a total expenditure of approximately \$1.4 billion for capacity enhancements. This expenditure is programmed to add 19,978 in program capacity. Ultimately, the ability of the Sarasota County School District to meet the capacity demands of the growing population depends upon the availability of funding for capital improvements and the effective allocation of these funds.

Sarasota County Public Schools receive capital outlay revenues from a variety of sources as identified in ~~Figure 12-1~~ Table 12-3 and 12-3A. The Capital Investment Tax (2 mil) is the most significant of the capital revenue sources. The District may allocate these funds only on capital projects contained in the DOE-approved School Plant Survey and the revenues tend to increase with both population growth and increasing property values. As noted, the CIT revenue is projected to rise from about \$119 million dollars annually to about \$144 million by 2011-12. About \$658 million is projected to be raised over the coming five years with about 67% of these funds (\$444 million) available for capacity enhancement.

The Infrastructure Sales Tax represents the second most significant revenue for school capacity needs. In June 1989, Sarasota County voters approved a referendum enacting a one-cent sales discretionary tax called the "Infrastructure Surtax", to be levied by Sarasota County for the purpose of construction, reconstruction or improvement of public facilities, pursuant to Chapter 212.055, Florida Statutes. The Infrastructure Surtax became effective in September, 1989, and sunset in 1999. It was subsequently approved by the voters to continue for an additional ten years until 2009. Sarasota County Ordinance ~~2007-08789-40, as amended~~, re-authorizes the Infrastructure Surtax for 15 more years and provides a general description of the County infrastructure projects to be funded with the surtax proceeds.

Twenty-five percent of the proceeds of this one-cent addition to the sales tax are distributed to the School district to be used for increases in the capacity of existing schools and the construction of new schools. In the period 1989-1996, the School Board received \$48.8 million dollars from Infrastructure Surtax funds, which was used for various improvements to existing facilities, the construction of new facilities, and the purchase of sites for future facilities. This source generates about \$16.9 million currently and is expected to produce about \$19 million annually by 2011-12. The \$90 million produced by this revenue over the next five years is available for capacity enhancement.

In 2004, the School Board adopted a resolution that requested the County to adopt an Educational Facility Impact Fee. County Ordinance No. 2004-028, which went into effect on May 1, 2004, requires new residential uses to contribute their fair share of the cost of capital improvements and additions to the educational system to accommodate growth. Impact fees currently generate about \$6.4 million annually. This revenue is expected to produce about \$32 million over the five year period. It should be noted that impact fee revenues must be spent on

new capacity and are dependent on the pace of growth.

Public Education Capital Outlay (PECO) funds provided by the Department of Education are based on demonstrated capacity need. Over the five-year period, about \$12 million is expected from this source for expanded capacity. Other revenue sources include: the Capital Outlay and Debt Service (CO&DS) Trust Fund and a one-time appropriation for Classroom for Kids and funds under the Effort Index Grant. Over the next five years, the district projects net revenues available for capacity to be approximately \$444 million.

~~In addition to the Infrastructure Surtax, the School Board receives revenues from impact fees, property tax, State resources, and other miscellaneous sources. The possible sources include: Capital Outlay and Debt Service (CO&DS) Trust Fund; Capital Outlay Bond Issue (COBI); Cooperative Funding of Vocational Education Facilities; Emergency Loans; General Obligation (G.O.) Bond Issue; Joint Use Facilities (Between two or more boards); Lease Revenue Bonds (LRB's); Public Education Capital Outlay (PECO); Race Track Revenue Bonds; Sidewalk and Bicycle Trails; Tax/Revenue Anticipation Notes (TRANS); and school impact fees.~~

Table 12-3 and Table 12-3A: provides a projection of revenues for an additional five-year period for the long term concurrency management program. These projections assume that the conditions and assumptions underlying the 2007-08 to 2011-12 projections will continue and indicate that ample resources should be available to meet the capital needs for schools projected by this study.

~~Figure 5-7-12-2 illustrates the projected capital revenues to finance capital needs of the School District from 2007-2004 through 2012-2010. Figure 5-7-12-3 illustrates the proposed expenditures for 2007-2004-08-05 through 2016-2014-17-15, with the largest amount (\$966,220,124, or 47.9%) allocated for new construction. Table 5-8-12-2 is the projected capital budget for 2007-08-2004-05 through 2016-17-2014-15.~~

**Table 5-8 12-3: Projected Capital Budget 2007-08 through 2016-17**

Account Description	2004-04 Amended Budget	2005-06 Projected Budget	2006-07 Projected Budget	2007-08 Projected Budget	2008-09 Projected Budget	2009-10 Projected Budget	2010-11 Projected Budget	2011-12 Projected Budget	2012-13 Projected Budget	2013-14 Projected Budget	2014-15 Projected Budget
CO & DS Distributed	161,868	165,105	168,407	171,775	175,211	178,715	182,289	185,935	189,654	193,447	197,316
Capital Outlay Bond Issue	1,212,142	2,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Impact Fees	2,000,000	6,800,000	7,140,000	7,497,000	7,871,850	8,265,443	8,430,751	8,599,366	8,771,354	8,946,781	9,125,716
Classrooms for Kids State Bond	2,228,236										
Race Track Fund Transfer	70,000										
Interest Income	1,285,686	1,286,280	1,287,087	1,287,809	1,288,495	1,289,199	1,296,919	1,404,298	1,412,827	1,421,039	1,429,409
Local Capital 2 Mills	74,948,120	84,096,659	94,188,258	103,607,084	113,967,792	127,642,927	142,961,198	160,116,542	179,240,527	200,850,190	224,952,212
Local Sales Tax	14,087,121	15,886,248	16,829,529	17,840,901	18,920,895	20,056,149	21,259,517	22,535,089	23,887,194	25,320,425	26,839,651
Other (Fuel Tax Refund etc)	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Public Education (PECO)	3,589,025	3,421,460	3,562,627	3,697,810	3,622,854	3,551,277	3,480,349	3,410,742	3,342,527	3,275,677	3,210,163
Loan Proceeds Certificates of Participation	40,248,090	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>\$150,021,229</b>	<b>\$112,865,025</b>	<b>\$124,385,000</b>	<b>\$135,211,277</b>	<b>\$147,048,090</b>	<b>\$162,184,811</b>	<b>\$178,811,023</b>	<b>\$197,252,247</b>	<b>\$218,024,090</b>	<b>\$241,107,559</b>	<b>\$266,854,446</b>

**Table 5-8 12-3: Projected Capital Budget 2007-08 through 2011-12**

<i>Revenue Source</i>	<i>2007-2008 Adopted Budget</i>	<i>2008-2009 Projected</i>	<i>2009-2010 Projected</i>	<i>2010-2011 Projected</i>	<i>2011-2012 Projected</i>	<i>5 Year Total Projected</i>
<b>Capital Investment Tax (2 mil)</b>	<b>\$ 119,101,977</b>	<b>\$ 125,057,076</b>	<b>\$ 131,309,930</b>	<b>\$ 137,875,426</b>	<b>\$ 144,769,197</b>	<b>\$ 658,113,606</b>
<i>less equipment &amp; maintenance purchases</i>	<u>67,006,620</u>	<u>73,363,246</u>	<u>50,971,622</u>	<u>42,073,635</u>	<u>86,812,444</u>	<u>320,227,567</u>
<i>less equipment &amp; maintenance transfers</i>	<u>1,428,157</u>	<u>885,612</u>	<u>921,036</u>	<u>957,877</u>	<u>996,192</u>	<u>5,188,874</u>
<i>less debt service payments</i>	<u>15,725,217</u>	<u>15,641,274</u>	<u>15,649,462</u>	<u>6,081,355</u>	<u>6,085,425</u>	<u>59,182,733</u>
<b>Net Available for Capacity</b>	<b>\$ 34,941,983</b>	<b>\$ 35,166,944</b>	<b>\$ 63,767,810</b>	<b>\$ 88,762,559</b>	<b>\$ 50,875,136</b>	<b>\$ 273,514,432</b>
<i>PECO New Construction</i>	<u>4,206,005</u>	<u>1,227,682</u>	<u>1,909,483</u>	<u>2,200,780</u>	<u>2,518,923</u>	<u>12,062,873</u>
<i>CO &amp; DS Maximum Proceeds</i>	<u>1,277,339</u>	<u>1,277,339</u>	<u>1,277,339</u>	<u>1,277,339</u>	<u>1,277,339</u>	<u>6,386,695</u>
<i>Infrastructure Sales Tax</i>	<u>16,950,000</u>	<u>17,458,500</u>	<u>17,982,255</u>	<u>18,521,723</u>	<u>19,077,375</u>	<u>89,989,853</u>
<i>Classrooms for Kids</i>	<u>9,461,716</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>9,461,716</u>
<i>Impact Fees</i>	<u>6,400,000</u>	<u>6,400,000</u>	<u>6,400,000</u>	<u>6,400,000</u>	<u>6,400,000</u>	<u>32,000,000</u>
<i>Special Act Bonds -Fuel Tax Refund</i>	<u>100,000</u>	<u>100,000</u>	<u>100,000</u>	<u>100,000</u>	<u>100,000</u>	<u>500,000</u>
<i>Interest, Including Profit on Investments</i>	<u>4,034,714</u>	<u>4,034,876</u>	<u>4,039,120</u>	<u>4,043,450</u>	<u>4,047,866</u>	<u>20,200,026</u>
<b>Net Available for Capacity</b>	<b>\$ 77,371,757</b>	<b>\$ 65,665,341</b>	<b>\$ 95,476,007</b>	<b>\$ 121,305,851</b>	<b>\$ 84,296,639</b>	<b>\$ 444,115,595</b>

Source: School Board of Sarasota County, 5 year District Facilities Work Plan

**Table 5-8 12-3A: Projected Capital Budget 2012-13 through 2016-17**

<b>Revenue Source</b>	<b>2012-2013 Projected</b>	<b>2013-2014 Projected</b>	<b>2014-2015 Projected</b>	<b>2015-2016 Projected</b>	<b>2016-2017 Projected</b>	<b>5 Year Total Projected</b>
<b>Capital Investment Tax (2 mil)</b>	<b>\$ 152,007,658</b>	<b>\$ 159,608,041</b>	<b>\$ 167,588,443</b>	<b>\$ 175,967,865</b>	<b>\$ 184,766,258</b>	<b>\$ 839,938,265</b>
<i>less equipment &amp; maintenance purchases</i>	<u>33,299,818</u>	<u>38,401,760</u>	<u>39,273,800</u>	<u>36,704,077</u>	<u>36,048,598</u>	<u>183,728,053</u>
<i>less equipment &amp; maintenance transfers</i>	<u>1,026,078</u>	<u>1,056,860</u>	<u>1,088,566</u>	<u>1,121,223</u>	<u>1,154,860</u>	<u>5,447,587</u>
<i>less debt service payments</i>	<u>6,081,750</u>	<u>6,082,550</u>	<u>6,084,750</u>	<u>-</u>	<u>-</u>	<u>18,249,050</u>
<b>Net Available for Capacity</b>	<b>\$ 111,600,012</b>	<b>\$ 114,066,871</b>	<b>\$ 121,141,327</b>	<b>\$ 138,142,565</b>	<b>\$ 147,562,800</b>	<b>\$ 632,513,575</b>
<i>PECO New Construction</i>	<u>527,526</u>	<u>4,923,087</u>	<u>2,443,196</u>	<u>2,359,078</u>	<u>2,272,437</u>	<u>12,525,324</u>
<i>CO &amp; DS Maximum Proceeds</i>	<u>1,229,708</u>	<u>1,234,302</u>	<u>1,238,988</u>	<u>1,243,767</u>	<u>1,248,642</u>	<u>6,195,407</u>
<i>Infrastructure Sales Tax</i>	<u>21,693,598</u>	<u>22,069,797</u>	<u>22,440,495</u>	<u>22,804,096</u>	<u>23,159,213</u>	<u>112,167,199</u>
<i>Impact Fees</i>	<u>6,400,000</u>	<u>6,400,000</u>	<u>6,400,000</u>	<u>6,400,000</u>	<u>6,400,000</u>	<u>32,000,000</u>
<i>Special Act Bonds -Fuel Tax Refund</i>	<u>100,000</u>	<u>100,000</u>	<u>100,000</u>	<u>100,000</u>	<u>100,000</u>	<u>500,000</u>
<i>Interest, Including Profit on Investments</i>	<u>4,100,000</u>	<u>4,100,000</u>	<u>4,100,000</u>	<u>4,100,000</u>	<u>4,100,000</u>	<u>20,500,000</u>
<b>Net Available for Capacity</b>	<b>\$ 145,650,844</b>	<b>\$ 152,894,057</b>	<b>\$ 157,864,006</b>	<b>\$ 175,149,506</b>	<b>\$ 184,843,092</b>	<b>\$ 816,401,505</b>

Source: School Board of Sarasota County, 5 year District Facilities Work Plan

## **Coordinated Public School Facilities Planning**

School planning is about providing adequate facilities, support network and services to educate Florida's residents. In 2002, Governor Jeb Bush identified school planning as a critical issue facing Florida's communities and ordered new legislation that required a comprehensive focus on school planning by requiring coordination of information.

The new regulations required local governments and school boards to enter into interlocal agreements that address school siting, enrollment forecasting, school capacity, infrastructure, collocation and joint use of civic and school facilities, sharing of development and school construction information, and dispute resolution and oversight.

In 2003, Sarasota County, the Town of Longboat Key, the City of North Port, the City of Sarasota, the City of Venice, and the School Board adopted the Interlocal Agreement for Public School Facility Planning. The process to adopt and implement the interlocal agreement has improved the working relationships between the County, School District and Municipalities and has led to a better understanding of each other's issues and concerns.

The result has been better understanding and cooperative decision making for school projects, collaborative initiatives to purchase lands and utilize existing County- and School Board-owned lands, better coordination of neighborhood compatibility and infrastructure with school projects, and improved data sharing. Coordinated planning efforts are leading to improved timing of sidewalk projects, improved traffic flow surrounding schools, improved buffers with school neighbors, and improved sensitivity for historical structures.

Along with the coordination prompted by the interlocal agreement, Section 163.3174, Florida Statutes, requires the local planning agency, which in Sarasota County is the Planning Commission, include a representative of the school district as a nonvoting member. This membership, along with the school board's review of development approval plans, keeps the School Board up-to-date on land use decisions that could affect future student populations.

Section 163.3177(6) (a), Florida Statutes, requires that the Future Land Use element of the Comprehensive Plan clearly identify the land use categories in which public schools are an allowable use. When delineating the land use categories where public schools are an allowable use, a local government is required to include in the categories sufficient land proximate to residential development to meet the projected needs for schools in coordination with public school boards and may establish differing criteria for schools of different type or size. Each local government shall include lands contiguous to existing school sites, to the maximum extent possible, within the land use categories in which public schools are an allowable use. School population projections and school site selection criteria are both addressed through the interlocal agreement which requires coordination between the County, School Board and municipalities and the comprehensive plan.

It is generally accepted that elementary schools should be located within residential neighborhoods. Middle and high schools, however, have a greater impact on the neighborhoods due to their increased size, traffic, sports events, and student movement. These schools are better suited to be located at the periphery of neighborhoods to serve a larger area and on larger roadways, such as collector and arterial roads.

Schools are also an integral part of Villages in the Sarasota 2050 Plan with elementary schools

required in each Village. While middle and high schools are allowed in Villages, there may be other locations proximate to the Village or other population concentrations to accommodate students generated from the area. The preferred location for schools in the Rural area is as close to existing infrastructure and population areas as possible. Schools operated by the School Board of Sarasota County are allowed ~~in any Future Land Use designation~~ pursuant to Future Land Use Policy 3.5.3, and 3.5.4., provided they are rezoned to the Government Use (GU) zoning district. Schools located in districts other than the GU zoning district are guided by the use table found in the Sarasota County Zoning Ordinance.

In 2004, the School Board adopted a resolution that requested the County to adopt an impact fee. County Ordinance No. 2004-028, which went into effect on May 1, 2004, requires new residential uses to contribute their fair share of the cost of capital improvements and additions to the educational system to accommodate growth. The impact fee, collected by the County and the municipalities and distributed to the School Board, is payable at the time of the Certificate of Occupancy. The current rate in 2005 is \$2,032 for single-family, \$474 for multi-family and \$138 for mobile home dwelling units.

The impact fee ordinance includes exemptions for principle residential uses that qualify as affordable housing, as specified in the latest Sarasota County Assistance Plan for the Housing Partnership Program, or as housing for older persons. The School Board and the Office of Housing and Community Development entered into an interlocal agreement to process the affordable housing exemptions. The School Board uses non-impact fee revenues to pay the impact fee that is waived from the affordable housing exemption.

The improved coordination and the additional revenues from the impact fee help to address the needs for adequate school facilities for the County's existing and future population, but do not fully meet the financial needs of the School Board. Additionally, the class size amendment and the Pre-Kindergarten initiative, which were approved by Florida voters in 2002, were not adequately funded by the State. The class size amendment is still being debated by the governor's office. This amendment would change how facility needs are calculated. Rather than evaluating capacity at the district level, it will be evaluated at the school level, and in three years, at the classroom level. Unless the amendment is repealed or modified, the School Board's facility needs would grow tremendously as the class size requirements would drill down from the district level to the school level and eventually to the class level. Furthermore, the volunteer universal Pre-K initiative may further strain the facility needs of the school district.

The 2005 Florida Legislature adopted requirements (referred to as school concurrency) that strengthen the relationship between land use planning and development, and planning for public schools to ensure availability of school capacity. In 2006, Sarasota County was selected by the Florida Department of Community Affairs as a "pilot community". Sarasota County, the School Board, the Cities of Sarasota, Venice, North Port, and the Town of Longboat Key worked to prepare a draft interlocal agreement, a public school facilities' element, and amendments to intergovernmental coordination and capital improvement elements.

These draft documents were used to assist the pilot communities as well as serve as examples for other areas of Florida. As a part of the process, elected officials from each of the governing bodies have participated in three convocations in order to provide direction and reach consensus on the draft documents. The County, the School Board, the Cities and Town have adopted a joint Amended Interlocal Agreement for School Facility Planning, as well as coordinated the process

for adoption of the Public School Facilities Chapter, and amendments to the Intergovernmental Coordination and Capital Improvements Chapters to ensure all local government comprehensive plan elements within the County are consistent with each other.

In addition, the data and analysis (Appendix F) supports the amendments for Sarasota County required to implement school concurrency. The study evaluates the school system and its relationship to development and growth from both a county-wide perspective and a finer grain look at schools within sectors and communities. The findings and conclusions support the goals, objectives and policies of the comprehensive plan including the establishment of levels of service standards and the delineation of concurrency service areas.

### Concerns for Schools

The preceding sections suggest the following concerns:

- Sarasota County Schools' existing facilities struggle to meet the demands of rapid growth and lower class sizes, while at the same time keeping pace with the replacement of aging facilities and the needs for technology upgrades.
- The existing school impact fees, combined with other local and state revenues, do not meet the school district's facility needs.

### Opportunities for Schools

The preceding discussions suggest the following opportunities:

- The School Board has planned future school facilities from 2005 through 2010 which will increase the 2010 school facilities system capacity (as measured in numbers of student stations).
- Sarasota County, the municipalities, and the School Board have established and improved formal coordination and could expand long range and immediate efforts in collaboration, shared uses, and information sharing.
- Sarasota County, the municipalities, and the School Board have implemented a public school facilities impact fee to be utilized for growth.

### Intent

Sarasota County, in coordination with the Sarasota County School District, has taken a long range perspective towards the provision of public schools. A number of schools and facilities have been developed in the decade. In confronting the future, Sarasota County includes public schools planning in the framework of the Comprehensive Plan. With effective planning, the provision of schools can be synchronized with the needs of the growing population. Benefits from the coordination of public schools can be maximized and allocated in areas of greatest need, while maximizing the potential of collocating these facilities with other public buildings and infrastructure.

In general, the Public Schools Facilities Chapter sets forth a program to serve the needs of residents, coordinates residential development with adequate school capacity, and encourages coordination and cooperation in planning efforts of various agencies and elected bodies within Sarasota County.

Public schools need appropriate funding for their construction and maintenance. Whenever and

wherever possible, interagency coordination and cooperation is encouraged in order to provide the necessary supporting infrastructure to accomplish these tasks. Consistent with this general overview, specific actions are proposed to meet future needs. The policies outline the major precepts of the Plan, while the Capital Improvements Chapter is also in alignment with the School District's Five-Year Capital Facilities Plan which identifies a schedule of capital outlay projects necessary to maintain educational facilities of the district. The Plan will aid in providing high quality Public schools for the foreseeable future.

**Public School Goal 31**

Collaborate and coordinate with the School Board of Sarasota County (School Board) to provide and maintain a high quality public education system which meets the needs of Sarasota County's existing and future population.

**Public Objective 3.1. Non-Regulatory Level of Service**

~~The County shall coordinate with the Sarasota County School Board to ensure that the Sarasota County Public School system meets the educational needs of present and future populations, as determined by the County's non-regulatory levels of service. Such Levels of Service are intended to coordinate the capital improvements programming for schools with land use decisions.~~

**Public Policy 3.1.1.**

~~The space needs of school facilities will be determined based on the following guidelines as updated by the School Board:~~

	<b>Student Stations</b>	<b>Capacity (Students)</b>	<b>Utilization Factor</b>
Elementary School	970	970	100%
Junior School	1,550	1,395	90%
High School	2,332	2,215	95%
Special School	=====	=====	100%
<i>(RU 33, Ord. 97-064, July 8, 1997)</i>	-	-	-

**Public School Objective 3.2.1.1: Coordination and Consistency**

The County shall implement and maintain mechanisms designed to more closely coordinate with the School Board in order to provide consistency between the County's comprehensive plan and public school facilities programs, such as:

- Greater efficiency for the School Board and the County by the placement of schools to take advantage of existing and planned roads, water, sewer, parks, and drainage systems;
- Improved student access and safety by coordinating the construction of new and expanded schools with road and sidewalk construction programs;

- The location and design of schools with parks, ball fields, libraries, and other community facilities to take advantage of shared use opportunities; and,
- The expansion and rehabilitation of existing schools so as to support neighborhoods.

**Public School Policy 3.2.1 1.1.1**

Manage the timing of new development to coordinate with adequate school capacity. Where existing and planned capacity will not be available to serve students from the property seeking a plan amendment for residential development, the County may use the lack of school capacity as a basis for denial.

**Public School Policy 3.2.2 1.1.2**

In cooperation with the School Board and the municipalities, Sarasota County will implement the Amended Interlocal Agreement for Public School Facility Planning for the County of Sarasota, Florida, between Sarasota County, all legislative bodies of the municipalities, including the Town of Longboat Key, the City of North Port, the City of Sarasota, and the City of Venice, and the School Board, adopted by the Sarasota County Board of County Commissioners April 8, 2003 on May 31, 2007, (effective July 2003), as it may be amended. The Amended Interlocal Agreement for Public School Facility Planning, as required by Sections 1013.33 and 163.31777, Florida Statutes, includes procedures for:

- Joint meetings;
- Student enrollment and population projections;
- Coordinating and sharing of information;
- School site analysis;
- Supporting infrastructure;
- Comprehensive plan amendments, rezonings, and development approvals;
- Education Plant Survey and Five-Year District Facilities Work program;
- Co-location and shared use;
- Implementation of school concurrency;
- Level of service standards;
- Concurrency service areas;
- Proportionate-Share Mitigation;
- Oversight process; and,
- Resolution of Disputes.

**Public School Policy 3.2.3 1.1.3**

The County shall include a representative of the school district, appointed by the School Board, as a nonvoting member of the local planning agency, as required by Section 163.3174, Florida Statutes.

**Public School Objective 3.3 1.2.: School Siting Criteria and Infrastructure**

Enhance community and neighborhood design through effective school facility design and siting standards.

**Public School Policy 3.3.1 1.2.1**

Sarasota County will continue to coordinate with the School Board to assure that proposed public school facility sites are consistent with the land use categories and policies of the Sarasota County Comprehensive Plan, pursuant to the Amended Interlocal Agreement for Public School Facility Planning.

**Public School Policy 3.3.2.1.2.2**

Consistent with Future Land Use Policy 3.5.1., and Public Policy 3.3.2, which addresses the location of institutional facilities, public schools will be an allowable use within the Urban Service Area, as designated on the Future Land Use Map, in the following land use designations: Low, Moderate, Medium, and High Density Residential; Office/Multi-family Residential Area ~~and Corridor~~; and Town and Village Centers, subject to the relevant Town and Village Center Plans.

**Public School Policy 3.3.3 1.2.3**

All public schools shall provide bicycle and pedestrian access consistent with Objective 1.4. and Policy 1.4.9. of the Transportation Plan and Section 1006.23, Florida Statutes. Bicycle access to public schools should be incorporated in the county-wide bicycle plan, as it is developed consistent with Policy 1.3.3. of the Recreation and Open Space Plan and Policy 1.4.1. of the Transportation Plan. Adequate parking at public schools will be provided consistent to applicable Land Development Regulations.

**Public School Policy 3.3.4 1.2.4**

Sarasota County will have the lead responsibility for providing sidewalks along the frontage of pre-existing development within the two mile distance, in order to ensure continuous pedestrian access to public schools. Priority will be given to cases of hazardous walking conditions, as identified by the Sarasota County School Board, pursuant to Section 1006.23, Florida Statutes. Specific provisions for constructing such facilities will be included in the Capital Budget adopted each fiscal year.

**Public School Policy 1.2.5**

In coordination with the School Board, the County will evaluate school crossing zones to consider safe crossing of children along major roadways. The County will prioritize existing developed and subdivided areas for sidewalk improvements, such as schools with a high number of pedestrian and bicycle injuries or fatalities, schools requiring courtesy busing for hazardous walking conditions, schools with significant walking populations, but poor pedestrian and bicycle access, and needed safety improvements. The County will coordinate with the MPO Long Range Transportation Plans to ensure funding for safe access to schools, including: development of sidewalk inventories and list of priority projects coordinated with the School Board recommendations are addressed.

**Public School Policy 1.2.6**

The County will require new development at the time of construction plan (final subdivision or site plan) to provide for safe walking conditions consistent with Florida's safe ways to school program:

1. New developments adjacent to school properties shall be required to provide a right-of-way and a direct safe access path for pedestrian travel to existing and planned school sites, and shall connect to the neighborhood's existing pedestrian network;
2. For new development and redevelopment within 2 miles of an existing or planned school, the County shall require complete, unobstructed and continuous sidewalks along the corridor that directly serves the school, or qualifies as an acceptable designated walk or bicycle route to the school.

**Public School Policy 3.3.5 1.2.7**

The School Board and County will jointly determine the need for and timing of on-site and off-site improvements necessary to support each new school or the proposed renovation or expansion of an existing school, and will enter into a written agreement as to the timing, location, and the party or parties responsible for constructing, operating and maintaining the required improvements, pursuant to Section 6 of the Amended Interlocal Agreement for Public School Facility Planning.

**Public School Policy 3.3.6 1.2.8**

The County and the School Board will work to find opportunities to collaborate on public transit and school bus routes to better serve citizens and students.

**Public School Objective 3.4 1.3: Funding**

Support supplemental and alternative sources for school capital funding.

**Public School Policy 3.4.1 1.3.1**

Sarasota County will continue to collect the Educational System Impact Fees for the School Board that requires future growth to contribute its fair share of the cost of required capital improvements and additions for educational facilities.

**Public School Policy 3.4.2 1.3.2**

With the School Board, the County shall review and recommend amendments, as necessary, to the Educational System Impact Fees ordinance, consistent with applicable laws.

**Public School Objective 3.5 1.4: Sustainability**

Encourage sustainable design and development for educational facilities.

**Public School Policy 3.5.1 1.4.1**

Coordinate with the School Board to continue to permit the shared-use and co-location of school sites and County facilities with similar facility needs, according to the Amended Interlocal

Agreement for Public School Facility Planning for the County of Sarasota, Florida, as it may be amended. Coordinate in the location, phasing, and design of future school sites to enhance the potential of schools as recreation areas, pursuant to Policy 1.5.3. of the Parks and Recreation Plan.

**Public School Policy 3.5.2 1.4.2**

Encourage the School Board to use sustainable design and performance standards, such as using energy efficient and recycled materials, to reduce lifetime costs.

**Public School Policy 3.5.3 1.4.3**

Consistent with Environment Chapter Policy 5.2.5., continue to coordinate efforts to build new school facilities, and facility rehabilitation and expansions to be designed to provide emergency shelters. Sarasota County will continue to fulfill the requirements of Section 1013.372, Florida Statutes, such that as appropriate new educational facilities will serve as public shelters for emergency management purposes.

**School Objective 1.5: Ensure Adequate School Capacity**

Sarasota County will evaluate the adequacy of school capacity when it considers future land use changes, rezonings, and construction plans (final subdivision and site plans) for residential development. This will be accomplished recognizing the School Board's statutory and constitutional responsibility to provide a uniform system of free and adequate public schools, and the County's authority for land use, including the authority to approve or deny petitions for future land use, rezoning, and construction plans (final subdivision and site plans) for residential development that generate students and impact the Sarasota County school system.

**School Policy 1.5.1**

The County will consider the School Board's comments and findings on the availability of adequate school capacity when considering proposed comprehensive plan amendments and other land use decisions as provided for in Section 163.3177(6) (a), Florida Statutes.

**School Policy 1.5.2**

Future land use changes, rezonings, and construction plans (final subdivision and site plans) for residential development may be approved in areas with adequate school capacity. Where capacity will not be available to serve students from the property seeking a land use change, the applicant will coordinate with the School Board to ensure adequate capacity is planned and funded. Where feasible, in conjunction with the plan amendment or zoning change, early dedications of school sites shall be encouraged. To ensure adequate capacity is planned and funded, the School Board's long range facilities' plans over the five-year, ten-year and twenty-year planning periods shall be amended to reflect the needs created by the land use plan amendment.

**School Policy 1.5.3**

Consistent with Section 7.4 of the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended, in reviewing petitions for future land use, rezoning, and

construction plans (final subdivision and site plans) for residential development which may affect student enrollment or school facilities, the County will consider the following issues:

- a) Provision of school sites and facilities within planned neighborhoods.
- b) Insuring the compatibility of land uses adjacent to existing schools and reserved school sites.
- c) The co-location of parks, recreation and community facilities with school sites.
- d) The linkage of schools, parks, libraries and other public facilities with bikeways, trails, and sidewalks.
- e) Insuring the development of traffic circulation plans to serve schools and the surrounding neighborhood.
- f) Providing off-site signalization, signage, access improvements and sidewalks to serve all schools.
- g) The inclusion of school bus stops and turnarounds in new developments.
- h) Encouraging the private sector to identify and implement creative solutions to developing adequate school facilities in residential developments.
- i) School Board staff comments and findings of available school capacity for comprehensive plan amendments and other land-use decisions.
- j) Available school capacity or planned improvements to increase school capacity.
- k) Whether the proposed location is consistent with any local government's school design and planning policies.

### **School Objective 1.6: Implement Public School Concurrency**

The County shall evaluate future land use changes, rezonings, and construction plans (final subdivision and site plans) for residential development to ensure adequate school capacity is available consistent with adopted level of service standards for public school concurrency.

#### **School Policy 1.6.1**

Consistent with the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended, the School Board and County agree to the following standards for school concurrency in Sarasota County:

#### **School Sub-Policy 1.6.1.1: Level of Service Standards**

Consistent with the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended, school concurrency requirements shall be effective for all applications for construction plans (final subdivision or site plans) accepted on or after October 1, 2008. School concurrency under these LOS standards shall be as follows, however, within designated concurrency service areas for identified backlogged facilities, interim standards shall apply. The interim level of service standard within these designated areas shall apply over the period covered by the 10-year schedule of improvements (See Appendix F Table PSF 23: Interim Level of Service Standards). The level-of service standards are initially set as follows:

**DISTRICT-WIDE**

<b><u>TYPE OF SCHOOL</u></b>	<b><u>ADOPTED LEVEL OF SERVICE</u></b>
<u>Special Purpose</u>	<u>100% of total program capacity (including relocatables)</u>

**BY STUDENT ATTENDANCE ZONE**

<b><u>TYPE OF SCHOOL</u></b>	<b><u>ADOPTED LEVEL OF SERVICE</u></b>
<u>Elementary Schools</u>	<u>Initial: 115% of permanent program capacity</u> <u>By 2012: elementary schools, with the exception of backlogged facilities, will achieve a level of service standard of 105% of permanent program capacity</u> <u>By 2017: all elementary schools will achieve a level of service standard of 105% of permanent program capacity.</u>
<u>Middle Schools</u>	<u>Initial: 100% of permanent program capacity</u> <u>By 2012: middle schools, with the exception of backlogged facilities, will achieve a level of service standard of 100% of permanent program capacity</u> <u>By 2017: all middle schools will achieve a level of service standard of 100% of permanent program capacity.</u>
<u>High Schools</u>	<u>Initial: 105% of permanent program capacity</u> <u>By 2012: high schools will achieve a level of service standard of 100% of permanent program capacity</u>

The adopted Public School Facilities Element has designated concurrency service areas for backlogged facilities and establishes interim level of service standards for these facilities (refer to Appendix F Table PSF 23). Within these designated areas, the interim standards for backlogged facilities will be improved to the adopted level of service standards within the ten-year period (by 2016-17) covered by the long term concurrency management program and Ten-Year Capital Facilities Plan.

Potential amendments to the level of service standards shall be considered at least annually at the staff working group meeting to take place no later than April 1 of each year. If there is a consensus to amend any level of service standard, it shall be accomplished by the execution of an amendment to the interlocal agreement by

all parties and the adoption of amendments to the County's and each City's comprehensive plan. The amended level of service standard shall not be effective until all plan amendments are effective and the amended interlocal agreement is fully executed.

No level of service standard shall be amended without a showing that the amended level of service standard is financially feasible, supported by adequate data and analysis, and can be achieved and maintained over the five years of the Five-Year Capital Facilities Plan. After the first five years of the Five-Year Capital Facilities Plan, level of service standards shall be maintained within each year of subsequent Five-Year Capital Facilities Plans. For backlogged facilities, level of service standards will be achieved within the initial period covered by the Ten-Year Capital Facilities Plan.

After the initial adoption of the Public School Facilities Element designating concurrency service areas for backlogged facilities, a plan amendment will be required to add any school facility to the listing of backlogged facilities. Backlogged facilities may be removed from the listing and shall no longer be considered backlogged when capacity improvements sufficient to achieve the adopted level of service standards are added to the financially feasible Five-Year Capital Facilities Plan. These previously designated backlogged facilities shall, thereafter, meet the adopted level of service standards for that school type as established herein.

#### **School Sub-Policy 1.6.1.2: Concurrency Service Areas**

- a) Consistent with Subsection 4.2(c), of the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended, the concurrency service area shall be coterminous with the applicable student attendance zone for elementary, middle and high schools. The most recent student attendance zones are shown on PSF Maps 4, 5 and 6 of the supporting data and analysis. The concurrency service areas for special purpose schools are district-wide. For the purpose of implementing a long term concurrency management system, PSF Maps 12 and 15 of the supporting data and analysis depict the concurrency service areas where backlogged facilities exist.
- b) Potential amendments to the concurrency service areas, other than periodic adjustments to student attendance zones, shall be considered annually at the staff working group meeting to take place each year no later than April 1. If there is agreement to amend the concurrency service area to establish boundaries other than those that are coterminous with student attendance zones, it shall be accomplished by the execution of an amendment to the Interlocal Agreement by all parties and amendment to the County's and each municipal comprehensive plan. The amended concurrency service area shall not be effective until the amended Interlocal Agreement for Public School Facility Planning is fully executed and comprehensive plan amendments are in effect. No concurrency service area shall be amended without showing

that the amended concurrency service area boundaries are financially feasible.

- c)** Concurrency service areas shall be established and subsequently modified to maximize available school capacity and make efficient use of new and existing public schools in accordance with level of service standards taking into account transportation costs, limiting maximum student travel times, the effect of court-approved desegregation plans, achieving social-economic, racial and cultural diversity objectives, and other relevant factors as determined by the School Board's policy on maximization of capacity. Other considerations for amending concurrency service areas may include safe access (including factors such as the presence of sidewalks, bicycle paths, turn lanes and signalization, general walkability), diversity and geographic or man-made constraints to travel. The types of adjustments to school operations that will be considered in the County shall be determined by the School Board's policies on maximization of capacity.
- d)** Concurrency service areas shall be designed so that the adopted level of service will be able to be achieved and maintained within the five years or applicable 10 years of the capital facilities plan, and so that the five-year or applicable 10-year schedule of capital improvements is financially feasible. Plan amendments are required for changes to the concurrency service area other than modifications to student attendance zones.

### **School Sub-Policy 1.6.1.3: Student Generation Rates**

As provided in Section 4.2(f) of the Amended Interlocal Agreement for Public School Facility Planning, the costs per student station and student generation rates are to be established annually by the school district in the adopted Five-Year Capital Facilities Plan. The student generation rates, used to determine the impact of a particular development application on public schools, shall be reviewed and updated at least every 2 years in accordance with professionally accepted methodologies.

### **School Sub-Policy 1.6.1.4: School Capacity and Enrollment**

The uniform methodology for determining if a particular school is over capacity, based on the adopted level of service standards, and shall be determined by the School Board. The School Board hereby selects permanent program capacity as the methodology to determine the capacity of elementary, middle and high schools. Relocatables (portables) are not considered permanent capacity. For special purpose schools, the methodology to determine capacity shall be based on total program capacity (includes portables). Consistent with Section 3.1 of the Amended Interlocal Agreement for Public School Facility Planning, school enrollment shall be based on the annual enrollment of each individual school, based on actual counts reported to the Department of Education in October of each year. The School Board will determine whether adequate capacity exists for a proposed development, based on the level of service standards and concurrency service areas according to the standards set in Section 4.2 (a) of the amended Interlocal Agreement For Public School Facility Planning.

### **School Sub-Policy 1.6.1.5: Concurrency Availability Standard**

- a) The County shall amend the concurrency management systems in its concurrency regulations to require that all new residential developments be reviewed for school concurrency at the time of construction plans (final subdivision or site plan), using the coordination processes specified in Section 7 of the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended. The County may choose to provide an informational assessment of school concurrency at the time of preliminary plan, but the test of concurrency shall be at construction plans (final subdivision or site plans) or its functional equivalent.
- b) The County shall not deny construction plans (final subdivision or site plans) for residential development for the failure to achieve and maintain the adopted level of service for public school capacity where:
  - i) adequate school capacity will be in place or under actual construction within three years after the issuance of the construction plans (final subdivision or site plan) or functional equivalent within the concurrency service area, or a contiguous concurrency service area and the impacts of development can be shifted to the area without disruption to the educational programs or conflict with school board policy on the students' travel time to school; or
  - ii) the developer executes a legally binding commitment to provide mitigation proportionate to the demand for public school facilities to be created by the actual development of the property subject to the construction plans (final subdivision or site plans), as provided in Section 4.2(f) in the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended.
- c) In evaluating construction plans (final subdivision or site plans) for concurrency, any relevant programmed improvements in the current year or years two or three of the five-year schedule of improvements shall be considered available capacity for the project and factored into the level of service analysis. Any relevant programmed improvements in years four or five of the five-year schedule of improvements shall not be considered available capacity for the project unless funding for the improvement is assured through School Board funding to accelerate the project, through proportionate share mitigation, or some other means of assuring adequate capacity will be available within three years. The School Board may use relocatable classrooms to provide temporary capacity while funded schools or school expansions are being constructed.
- d) This Policy shall not be construed to limit the authority of the County to deny the construction plans (final subdivision or site plans) for residential development for reasons other than failure to achieve and maintain the adopted level of service for public school capacity.

- e) Consistent with Subsection 4.2(f) of the Amended Interlocal Agreement for Public School Facility Planning, as it may be amended, in the event that there is not sufficient capacity in the affected concurrency service area, based on the adopted level of service standards to address the impacts of a proposed development and the availability standards for school concurrency cannot be met, the following shall apply:
  - i) The project shall provide capacity enhancement(s) sufficient to meet its impact through proportionate share mitigation; or,
  - ii) The project shall be delayed to a date when the level of service can be assured through capital enhancement(s) or planned capacity increases; or,
  - iii) A condition of approval of the construction plans (final subdivision or site plans) shall be that the project's impact shall be phased and phases delayed shall be delayed to a date when capacity enhancement and level of service can be assured; or,
  - iv) The project shall not be approved.

#### **School Policy 1.6.2 Proportionate Share Mitigation**

Options for providing proportionate share mitigation for any approval of residential dwelling units that triggers a failure of level of service for public school capacity shall include the following:

- i) contribution of, or payment for, acquisition of new or expanded school sites;
- ii) construction or expansion of, or payment for, permanent school district facilities;
- iii) mitigation banking within designated areas, based on the construction of a public school facility, in exchange for the right to sell capacity credits. Capacity credits shall be sold only to developments within the same concurrency service area or a contiguous concurrency service area; and,
- iv) Educational Facility Benefit Districts.

Mitigation shall be directed to projects in the School District's Five-Year Capital Facilities Plan that the School Board agrees will satisfy the demand created by that development approval, and shall be assured by a legally binding development agreement between the School Board, the County, and the applicant executed prior to the issuance of the construction plans (final subdivision or site plans).

If the School Board agrees to the mitigation, the School Board must commit in the agreement to placing the improvement required for mitigation into its Five-Year Capital Facilities Plan. This development agreement shall include the developer's commitment to continuing renewal of the development agreement until the mitigation is completed as determined by the School Board.