

# CHAPTER 11, PUBLIC SCHOOL FACILITIES ELEMENT

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## **EXECUTIVE SUMMARY**

Public schools are a cornerstone to the well-being and future of a community. Generally, new residential development occurring within the community is the primary contributor to student population growth and has the most significant impact on the public school system. Because of this relationship between residential development and the provision of public schools, coordination between local governments and the school district is critical to ensuring that future student growth needs are addressed and can be accommodated within the public school system.

Recognizing the importance of planning for public schools, the 2005 Florida Legislature enacted legislation amending Sections 163.3180 and 163.3177(12), Florida Statutes (F.S.), mandating the implementation of public school concurrency supported by data and analysis. The data, inventory and analysis contained herein details the methods that have been employed to support the Charlotte County School Concurrency program and ensure that public school capacity needs are met.

Within Charlotte County, the participants in school concurrency are Charlotte County, the City of Punta Gorda, and the School District of Charlotte County. Once school concurrency has been implemented in Charlotte County, the review process will require that the public school facilities necessary to maintain the adopted level of service for schools are in place prior to or concurrent with the student impact from new residential development.

The Goals, Objectives, and Policies section is adopted by ordinance. This section addresses the correction of existing school capacity deficiencies, establishes a level of service standard for schools, identifies the financial feasibility of the School District's Capital Plan, coordinates the location of planned public school facilities with the plans for supporting infrastructure, and coordinates location of public school facilities relative to the location of other public facilities such as parks, libraries and community centers to the extent possible.

## **I. INTRODUCTION**

### **A. Purpose**

The purpose of the data, inventory and analysis is to present and explain the information used to plan for public schools and establish school concurrency in Charlotte County. This data and related analysis will be used to plan school facilities, anticipate growth, and identify revenue requirements and sources. It verifies that a financially feasible school concurrency program, which will achieve and maintain an adopted level of service for schools in Charlotte County, can be established.

The data and analysis necessary to adopt a public school concurrency program is consistent with the amended Interlocal Agreement for Public School Facility Planning (Attachment A), Subsection 9J-5.025(2), Florida Administrative Code (F.A.C.) and Chapters 163 and 1013, F.S.

The data, inventory and analysis along with the goals, objectives and policies establish the basis for coordination between the school board and local governments for public school planning, and the review and approval of residential development to ensure that school capacity at the adopted level of service standard is available prior to or concurrent with the student impact associated with residential development.

### **B. Relationship to the Comprehensive Plan**

The goals, objectives and policies identified in the *Public School Facilities Element* share a connection with several other elements of the Comprehensive Plan, including:

The *Future Land Use Element* provides the overall growth management strategies by defining the direction and intensity of future growth and development. This element influences the location of both future residential development and future public school facilities consistent with the future land use map.

The *Intergovernmental Coordination Element* provides opportunities to improve collaboration and coordination with other agencies, including the School Board. This collaboration includes the future location of public schools, the infrastructure improvements necessary to accommodate schools and the school concurrency process.

The *Capital Improvements Element* will reflect the School Board's financially feasible strategy for the delivery of public schools necessary to achieve and maintain the adopted level of service for schools. The establishment of a level of service for schools serves as a primary role in growth management and will help shape the future demand for public schools. In addition, the *Capital Improvements Element* establishes the five-year budget plan for infrastructure improvements including necessary improvements to support public schools.

## **II. LEGISLATION**

### **A. Federal Regulations**

Local governments coordinate with the School District on a variety of issues, and understand that the School Board is subject to federal regulations. Because of the Tenth Amendment, this role is limited and most education policy is decided at the state and local levels.

### **B. State Regulations**

Within the State of Florida, there are separate constitutional roles for local governments and school boards. Local governments have regulatory authority over the use and development of land. School boards have the authority to finance, construct and operate public schools and are mandated to provide a uniform system of free public education. In recent years, the Florida Legislature has expanded regulations to increase the coordination of land use planning with school facility planning, and made school concurrency a requirement.

#### *Chapter 163, Florida Statutes*

Chapter 163 of the Florida Statutes contains the State's Local Government Comprehensive Plan and Land Development Regulation Act. The Act provides local governments with the authority to plan for future development and growth and to adopt and amend a comprehensive plan. Section 163.3177(h), FS. describes the provisions required within the Intergovernmental Coordination Element of the local comprehensive plan. The updated sections 163.31777 and 163.3180 (13) F.S require local governments and School Boards to update the interlocal agreement for Public School Facility Planning and established provisions for School Concurrency.

#### *Chapter 1013, Florida Statutes*

Chapter 1013 of the Florida Statute's contains the State's Educational Facilities Act. The chapter authorizes state and local officials to cooperate in establishing and maintaining educational plants that will provide for public educational facilities throughout the state.

#### *Rule 9J-5.025, Florida Administrative Code (FAC)*

Rule 9J-5 of the FAC provides the standards and the criteria for local government comprehensive plans. 9J-5.025 FAC requires each local government to adopt a public school facilities element which meets the minimum criteria of this section. Public school concurrency is intended to ensure that the capacity of schools is sufficient to support development at the adopted level of service standard. These minimum criteria are intended to assure coordination between local governments and the school board in planning and permitting development and in building and adding capacity to schools so that school capacity at the adopted level of service standard is available at the time of the impacts of development.

## **C. Local Regulations**

### *Interlocal Agreements*

Intergovernmental agreements allow governments to cooperate with one another in the performance of tasks, thereby reducing a duplication of services and possibly increasing cost efficiency. In 2003, the City, County and School Board executed the “Interlocal Agreement for Public School Facility Planning” in an effort to better coordinate such things as utility locations and school facility planning. As stated above, this agreement is now being updated to include the required provisions for school concurrency.

### III. INVENTORY AND ANALYSIS

#### A. Charlotte County Information (Population / Trends)

##### Population Projections

Charlotte County is located next to the Gulf of Mexico on the southwestern coast of Florida. The County is approximately 694 square miles, and contains 129 square miles of water bodies. It is bordered by Sarasota and DeSoto Counties to the north, Highlands County to the northeast, Glades County to the east, Hendry County to the southeast, and Lee County to the south. According to the 2000 U.S. Census the total population was 141,627. Of the 141,627 persons, 22,186 were students (Pre-K through 12) enrolled in school.

**Table 11.1: Charlotte County Population**

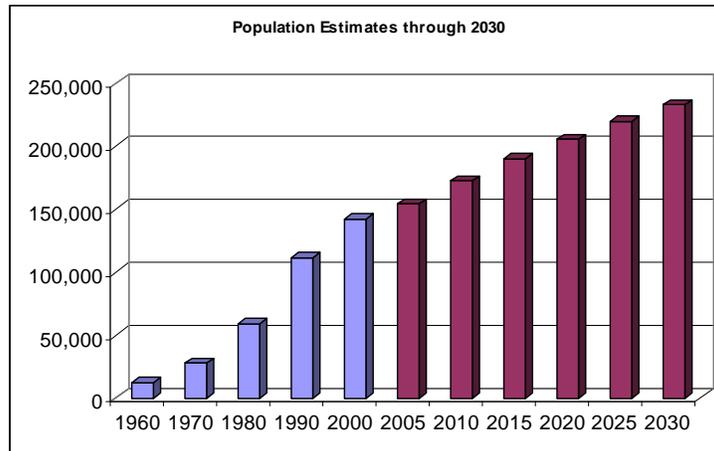
Year	Population	% Change
1980	58,460*	112%
1990	110,975*	90%
2000	141,627**	28%
2005	154,033	9%

Source: \*Population Division – US Census Bureau 3/27/95

\*\*US Census Bureau - 2000 US Census Demographic Profile

Historic population data were collected for the entire County in 10 year increments dating back to 1980. Table 11.1 above identifies that the overall population of the County has been steadily increasing through the year 2005. Graph 11.1 below shows the steady population growth since 1960 and the projected growth through 2030.

**Graph 11.1: Population Estimates**



Source: Charlotte County Comprehensive Plan, Future Land Use Element

Although the population is expected to continually increase, the rates at which it will grow are projected to slow.

Charlotte County is divided into four districts: West County, Mid County, South County, and East County. The City of Punta Gorda is located in South County, and Mid County is home to almost 50% of Charlotte’s population. Most of the development within the County has occurred along potable water lines, and the intensity of residential development is low. However, there remain 145,000 vacant parcels of previously platted land.

The development in West County has occurred primarily along the western half of the Cape Haze peninsula. The existing land uses in Mid County are similar to those in West County, and 76 percent of West County parcels remain undeveloped. The commercial nodes of activity for this part of the County are S.R 776 and C.R 775.

South County, although home to the City of Punta Gorda, also contains the rural communities Cleveland and Solana. The southern third of South County is rural and agricultural, while areas around Punta Gorda are urbanized.

Future growth will likely be concentrated in the southern and western areas of Charlotte County. This is further supported by recent development activity along Charlotte Harbor and the Gulf Coast. Table 11.2 shows the population projection by jurisdiction through 2020. The population projections in the Charlotte County Comprehensive Plan were generated by The University of Florida Bureau of Economic and Business research (BEBR) medium. These projections were increased by 22 percent to reflect the influx of seasonal visitors. The distribution of population was based on historical trends and residential certificates of occupancy collected and tracked by Charlotte County’s Land Information Department. According to the Growth Management Department, this information provides the latest development trends in the County.

**Table 11.2 Charlotte County / Municipal Future Population Projections**

Jurisdiction	2000	2006	2010		2015		2020	
			Low <sup>1</sup>	High <sup>1</sup>	Low <sup>1</sup>	High <sup>1</sup>	Low <sup>1</sup>	High <sup>1</sup>
<b>Punta Gorda</b>	14,344	16,952	19,895	24,848	20,646	28,796	21,141	32,929
<b>Unincorporated County<sup>3</sup></b>	127,283	139,817	193,239	188,286	211,886	203,736	230,179	218,891
<b>County Total</b>	141,627	160,315	213,134 <sup>2</sup>		232,532 <sup>2</sup>		251,320 <sup>2</sup>	

Source: University of Florida Bureau of Economic and Business Research

<sup>1</sup>Estimates obtained from Charlotte County Comprehensive Plan

<sup>2</sup>Population estimates obtained from BEBR medium projections and include an increase of 22% to reflect the seasonal population.

<sup>3</sup>Estimated obtained by subtracting out the low and high population estimate for Punta Gorda.

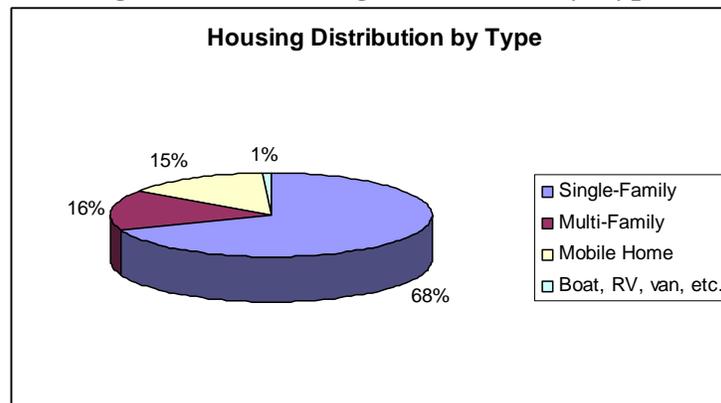
## Seasonal Population

During the winter months many counties and cities in the State of Florida experience an increase in population due to the migration of seasonal residents. Charlotte County and its municipalities are no exception. The County increases the BEBR future population projections by 22 percent to account for this influx of residents. Seasonal residents do not have a significant impact on the school age population because the seasonal population does not usually include families with children.

## Housing

According to the 2000 U.S. Census, there were a total of 96,060 housing units within the County, including 71,026 occupied units and 25,034 vacant units. Based on a total population of 141,627, the average household size is 2.14 persons per household. The distribution percentage for the four housing categories is shown below in Figure 11.1.

**Figure 11.1: Housing Distribution by Type**



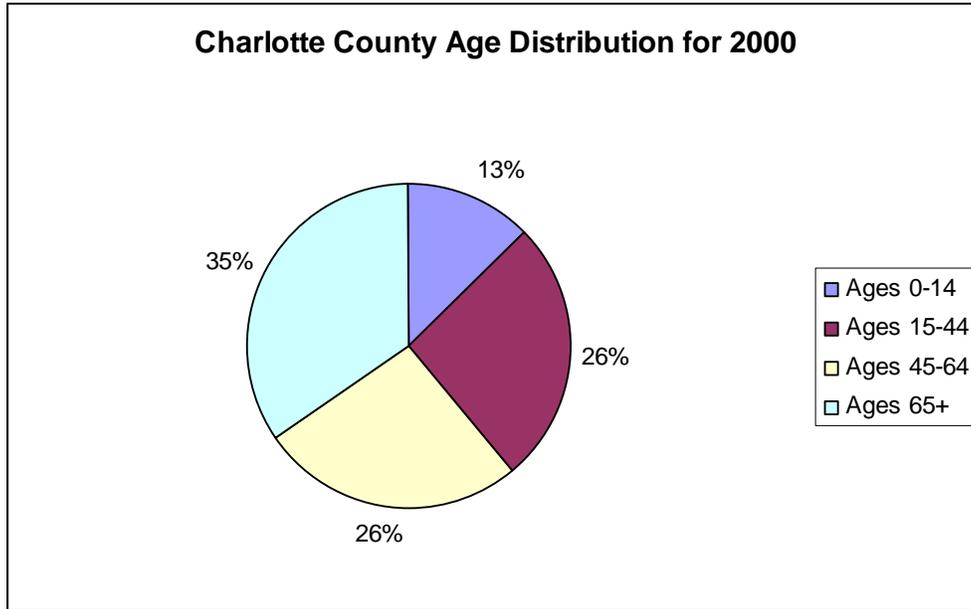
Source: US Census Bureau - 2000 US Census Demographic Profile

## Residential Development - Growth Areas

Most of the commercial and residential activities of Charlotte County are centered in the City of Punta Gorda, the only incorporated area. The County has almost doubled its population per decade in the last 50 years. The average population density for the County is 204.2 persons per square mile. However, Charlotte County continues to sustain a large population of elderly and retired persons. In 2000, more than half of the population was over 54 and approximately 34% of the population was over 65 years of age. Much of the County's platted subdivisions are marketed as retirement communities.

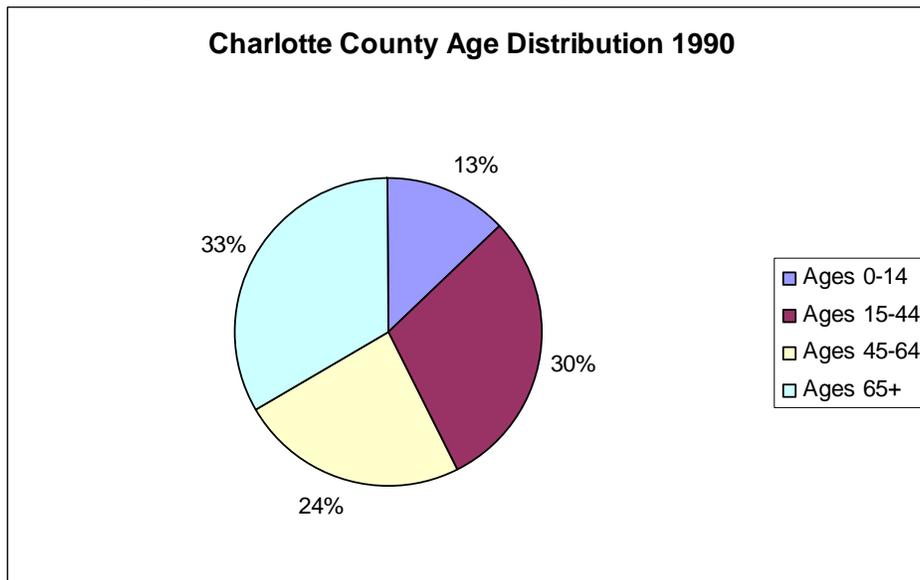
According to BEBR, around 35 percent of the Charlotte County 2000 population is 65 years of age or older. Another 26 percent of the County's 2000 population is between the ages of 45 and 65. Together these two cohorts account for 61 percent of the County's 2000 population. In 1990, these two cohorts accounted for 57 percent of the Charlotte County population. The age distribution indicates that the County remains a destination for retirees and those people who are approaching retirement age. Figure 11.2 and Figure 11.3 illustrate these age distributions.

**Figure 11.2: Charlotte County Age Distribution for 2000**



Source: University of Florida Bureau of Economic and Business Research

**Figure 11.3: Charlotte County Age Distribution 1990**



Source: University of Florida Bureau of Economic and Business Research

According to the Charlotte County Comprehensive Plan, in each of the County planning districts, the 65 and older age bracket accounts for more than 30 percent of the district population. In Mid-County, persons aged 65 and over make up 31 percent of the population while in West, South, and East County the same bracket accounts for almost 40 percent of the population. Please see Figure 11.4 for the population density within Charlotte County and the extent of the Urban Service Areas in the Western portion of the county.

Approximately 14,467 residential dwelling units received permits in Charlotte County between 2003 and 2007, with the majority of the permits (72%) being issued to detached single-family homes. Table 11.3 below provides a breakdown of County permits by year and unit type and Figure 11.5 indicates the associated dwelling unit locations.

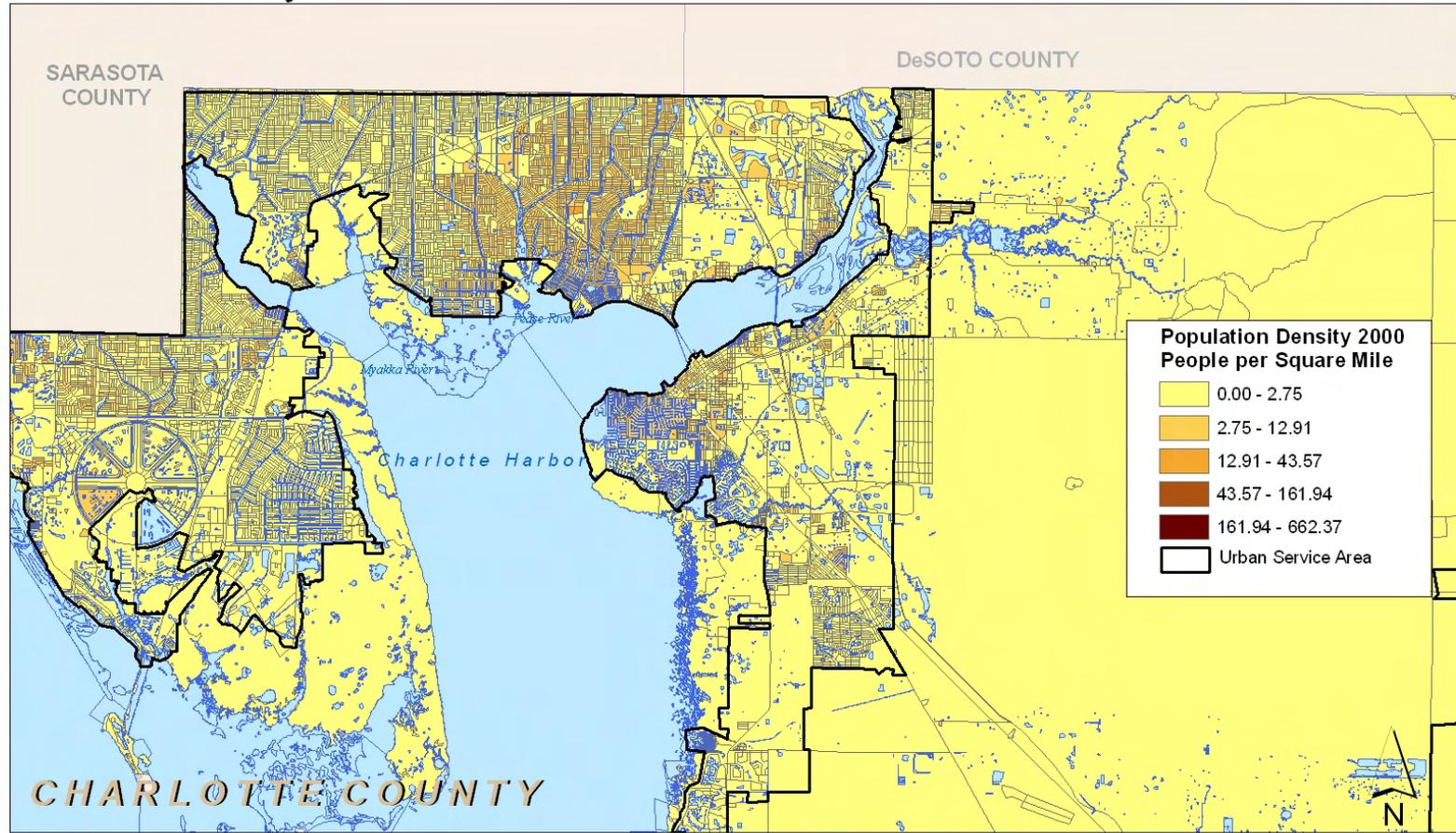
**Table 11.3 – Charlotte County Residential Permits 2003-2007**

<b>2003-2007 Charlotte County Residential Permitting</b>				
<b>Year</b>	<b>Detached Single Family</b>	<b>Duplex</b>	<b>Multi-family (3 or more units)</b>	<b>Mobile Homes</b>
2003	1,785	40	49	189
2004	2,182	24	115	1,237
2005	2,756	67	135	1,661
2006	2,710	51	150	119
2007	915	32	58	107
<b>Totals</b>	<b>10,433</b>	<b>214</b>	<b>507</b>	<b>3,313</b>

Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008

Figure 11.4 Population Density and Urban Service Areas

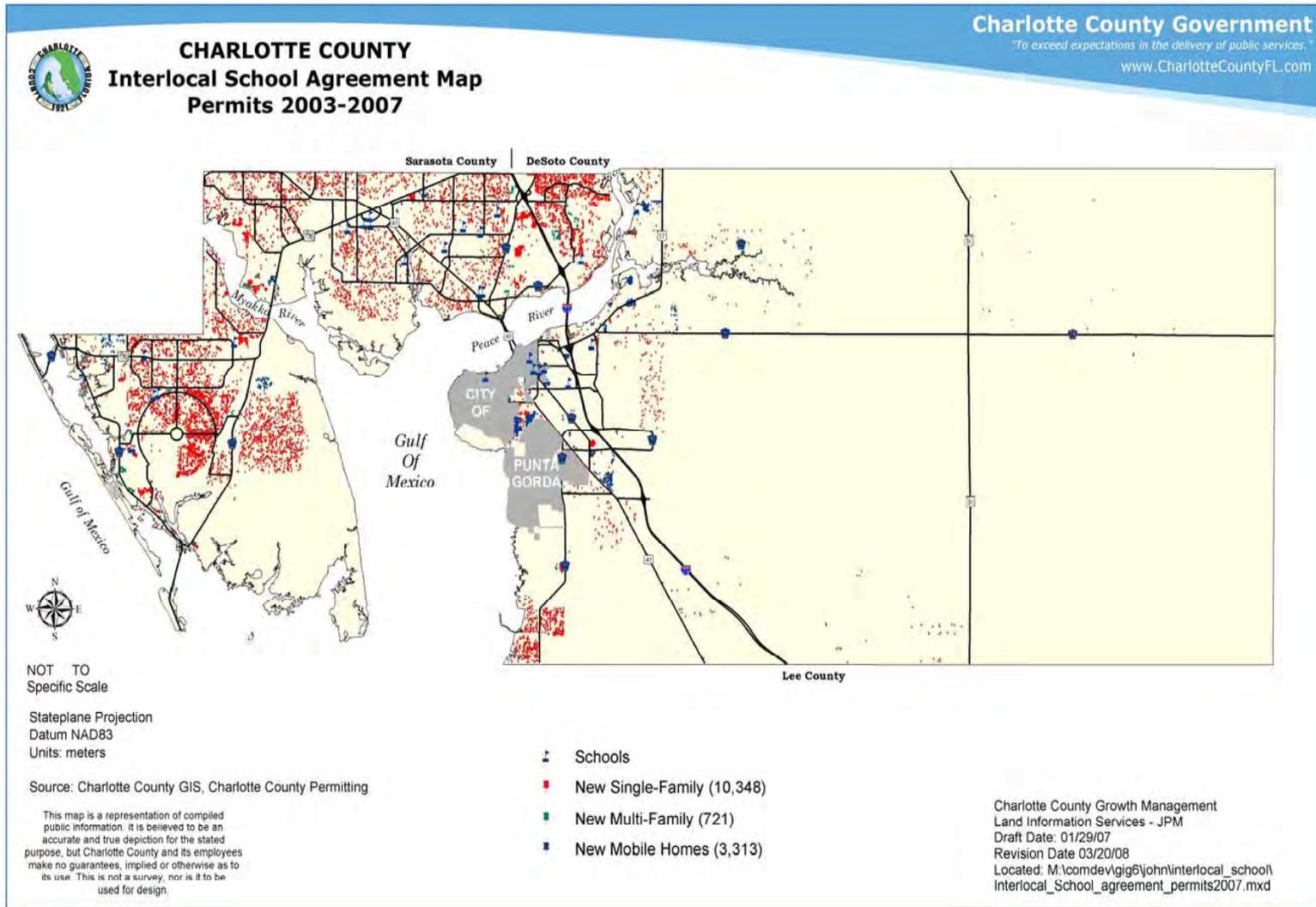
Population Density by Census Block  
Urban Service Areas  
Charlotte County



Source: US Census Bureau, 2000

144204000

Figure 11.5 2003-2007 Residential Permit / Dwelling Unit Locations



Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008

In addition to the residential permits issued by the County, the City of Punta Gorda issued 379 detached single-family residential permits between 2004 and 2007. Table 11.4 below provides a breakdown of City permits by year and Figure 11.6 indicates the locations of the 37 dwelling units.

**Table 11.4**  
**City of Punta Gorda**  
**Single Family Permit Activity**

<b>Year</b>	<b>Detached Single Family</b>
2004	124
2005	100
2006	118
2007	37
<b>Total</b>	<b>379</b>

*Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008*

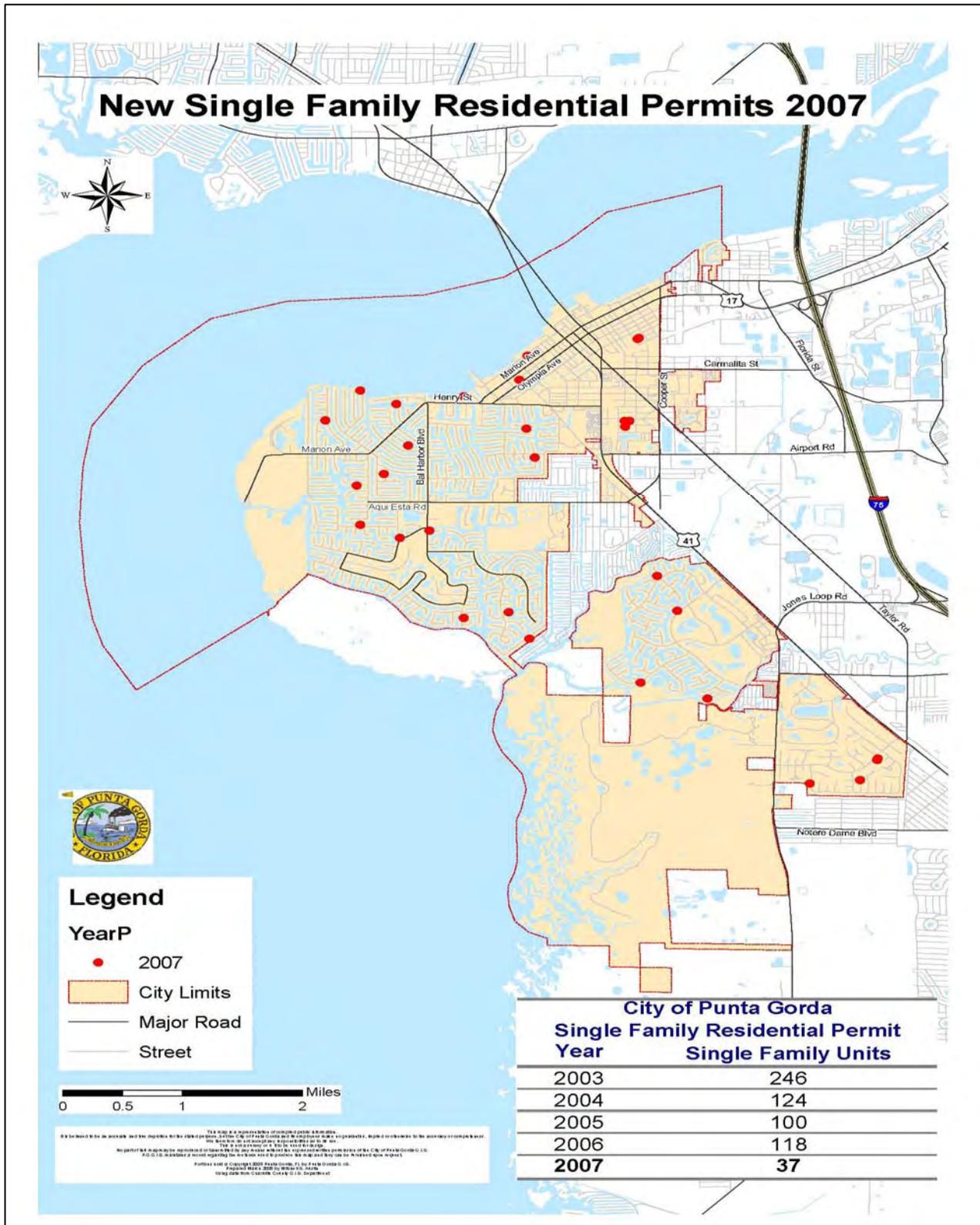
Future residential development is most likely to occur in the Urban Service Overlay District, both within the Infill and Suburban Areas. In the urbanized area 59 percent of the land is vacant and only 41 percent is developed. Table 11.5 below presents a summary of the residential units approved in Charlotte County. The specific location of the DRC Approvals has been identified on Figure 11.7 for the City of Punta Gorda and Figure 11.8 for Unincorporated Charlotte County.

**Table 11.5**  
**2005-2007 Summary of DRC**  
**Approved Lots/Units in Charlotte County**

<b>2005 – 2007 Summary</b>			
	<b>2005</b>	<b>2006</b>	<b>2007</b>
<b>County</b>	2,499	1,958	3,897
<b>City</b>	386	144*	353*
<b>TOTAL</b>	2,885	2,102	4,250

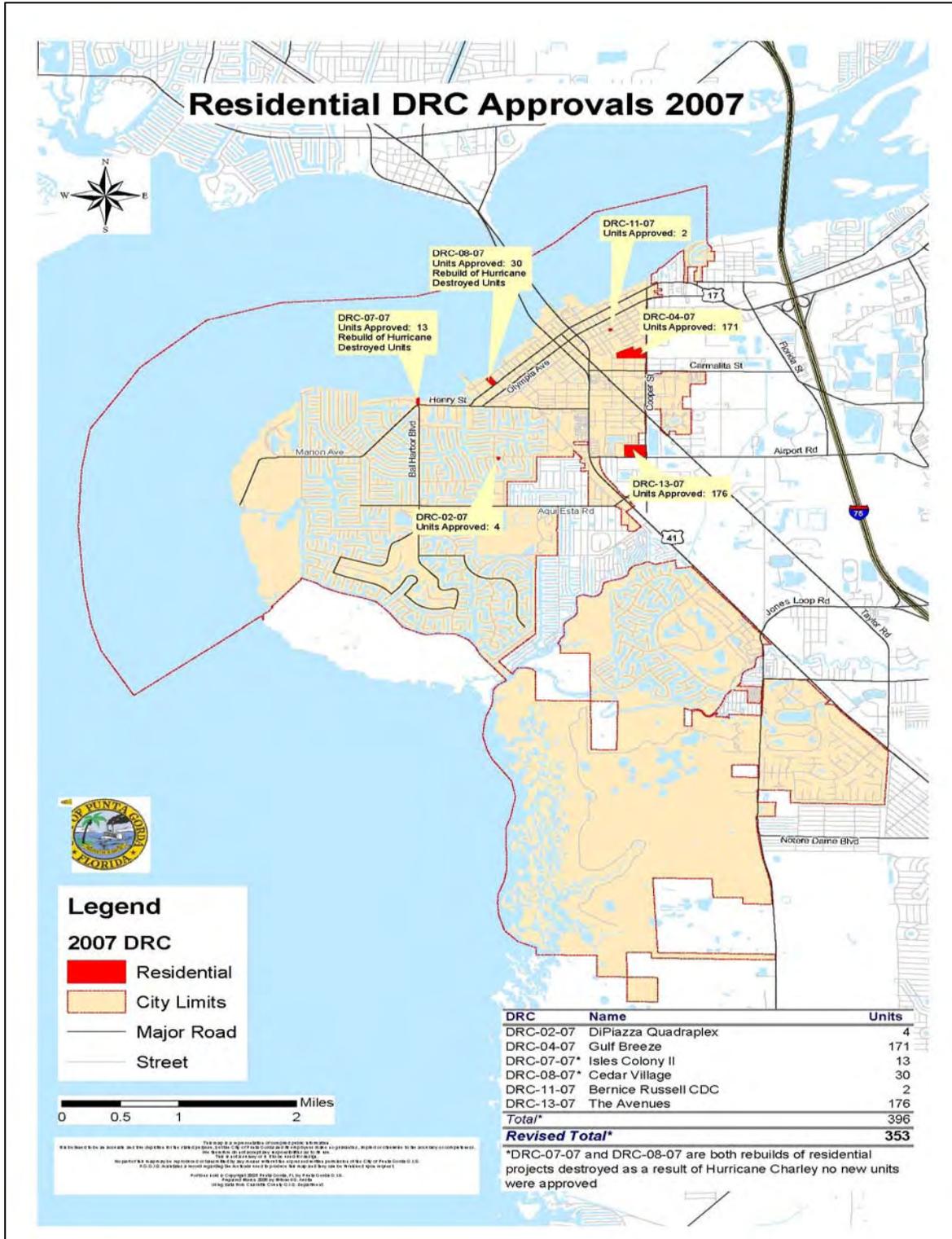
*Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008*

Figure 11.6 2007 City of Punta Gorda Single-Family Residential Permit Locations



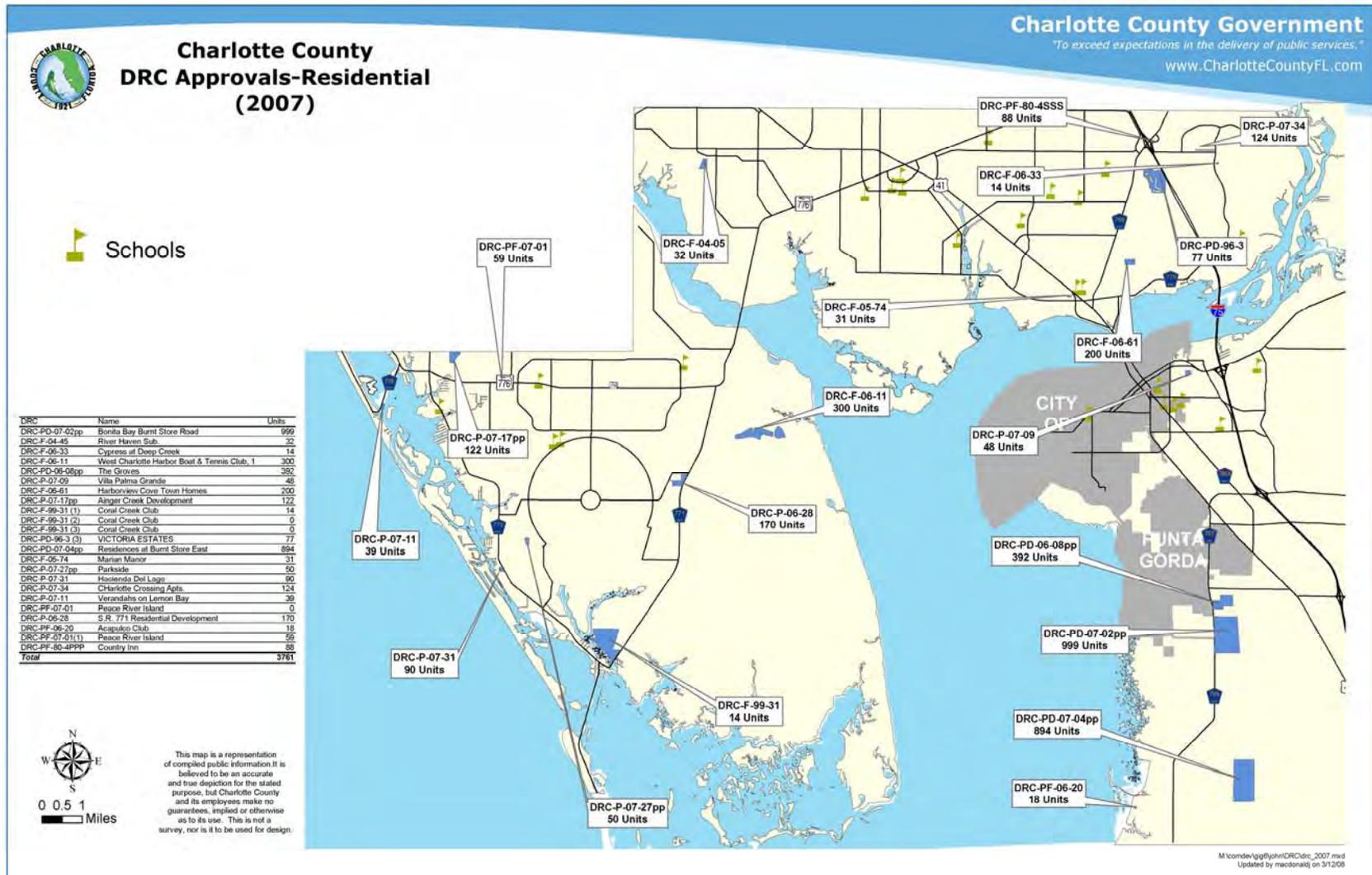
Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008

Figure 11.7 City of Punta Gorda - 2007 Residential DRC Approvals



Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008

Figure 11.8: Charlotte County - 2007 Residential DRC Approvals



Source: Charlotte County - PowerPoint Presentation at the 5th Annual Meeting to Coordinate Land Use and Public School Planning, May 5, 2008

## B. Existing Public School Facility Conditions

### School-Age Population

According to the 2000 U.S. Census, there were 12,932 students (Pre-K through 12) public and private school students attending public school in Charlotte County. Between 2002 and 2007, enrollment in Charlotte County schools grew from 16,401 students to 16,933 students or 3.24 percent. Table 11.6 shows the Public School trends in the last five years by school type.

**Table 11.6 Enrollment Change by School Type 2002-2007**

Year	Elementary	Middle	High	Total	Annual Growth
2002	6,933	4,288	5,180	16,401	
2003	7,015	4,350	5,359	16,724	323
2004	7,128	4,446	5,544	17,118	394
2005	6,762	4,222	5,533	16,517	-601
2006	7,034	4,108	5,620	16,762	245
2007	7,179	4,008	5,746	16,933	171

Source: Charlotte County Public Schools

### Existing School Enrollment, Capacity and Utilization (by school and by type)

The Charlotte County School District currently operates 10 elementary schools, 4 middle schools, 3 high schools, 1 pre-K center, and 3 specialty schools. As shown in Table 11.7 below, the current enrollment, capacity and utilization of each school, by school type (elementary, middle, high) has been identified. There are currently 20,613 student stations accommodating the existing 16,814 students in elementary, middle and high school. Currently, Kingsway Elementary is the only school operating at a utilization rate (enrollment to total capacity) greater than 100%.

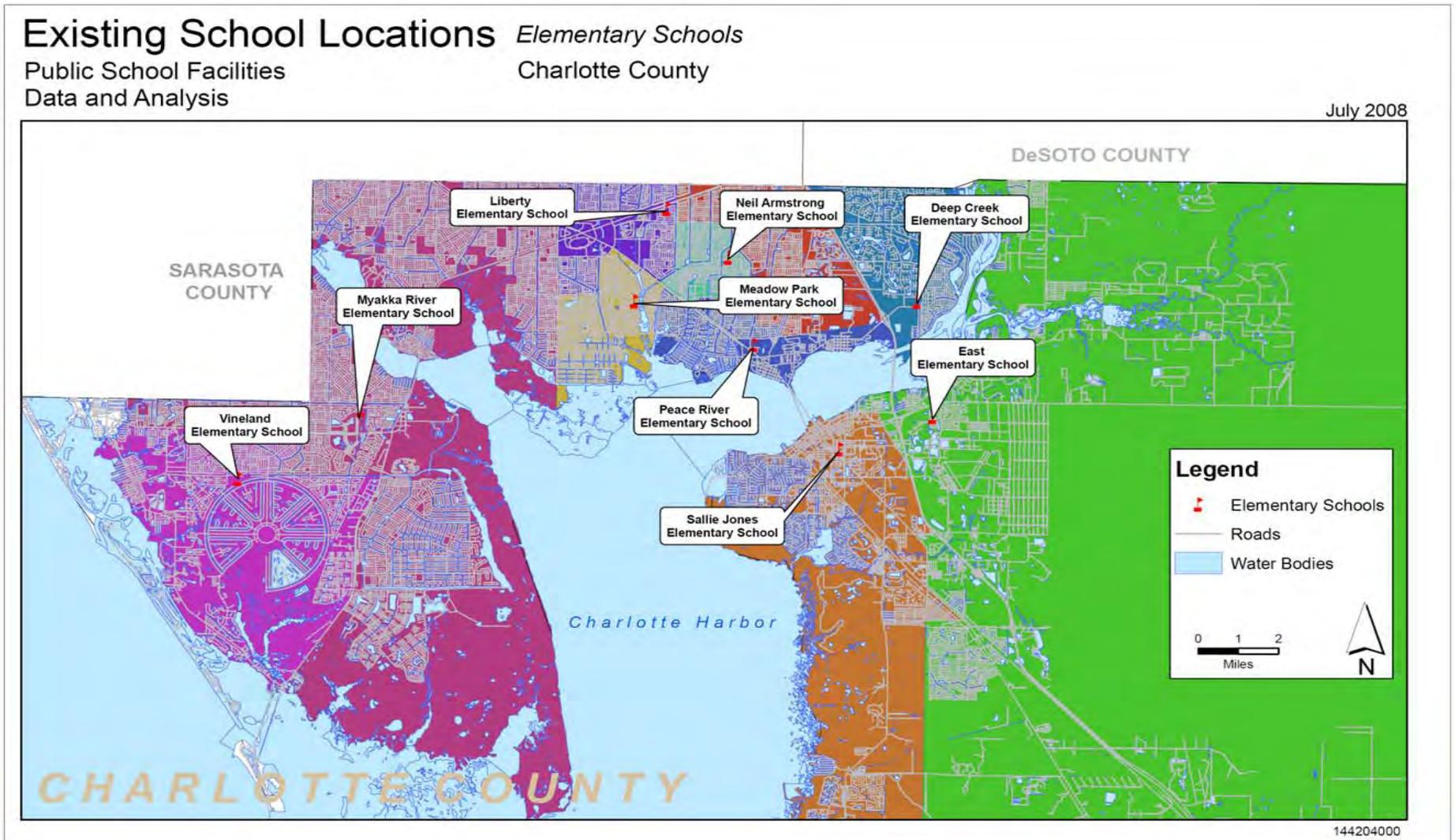
**Table 11.7: Existing School Enrollment, Capacity and Utilization 2007-08**

SCHOOL NAME	Permanent Capacity	Modular/Relocatable Capacity	Total FISH Capacity	SY 08/09		
				Enroll.	Cap.	Util.
<b>Elementary Schools</b>						
Sallie Jones	757		757	709	757	94%
East	887		887	556	706	79%
<b>Sub-Total Service Area (SJ,EE)</b>	<b>1644</b>	<b>0</b>	<b>1644</b>	<b>1265</b>	<b>1463</b>	<b>86%</b>
Deep Creek	707	231	938	840	938	90%
Kingsway	745	36	781	750	781	96%
Peace River	887		887	618	887	70%
Neil Armstrong	887		887	584	887	66%
Liberty	713	126	839	735	839	88%
Meadow Park	511	342	853	725	853	85%
<b>Sub-Total Service Area (DC,KE,PR,NA,LE,MP)</b>	<b>4450</b>	<b>735</b>	<b>5185</b>	<b>4252</b>	<b>5185</b>	<b>82%</b>
Myakka River	685	54	739	627	739	85%
Vineland	699	286	985	800	985	81%
New Elementary School (2015)						
New Elementary School (2016)						
<b>Sub-Total Service Area (MR,VE,E1,E2)</b>	<b>1384</b>	<b>340</b>	<b>1724</b>	<b>1427</b>	<b>1724</b>	<b>83%</b>
<b>Total Elementary Schools</b>	<b>7478</b>	<b>1075</b>	<b>8553</b>	<b>6944</b>	<b>8372</b>	<b>83%</b>
<b>Middle Schools</b>						
L.A. Ainger	927	139	1066	999	1066	94%
Murdock Middle	867	158	1025	935	1025	91%
Port Charlotte Middle	974		974	940	974	97%
Punta Gorda Middle	1203		1203	1050	1203	87%
New Middle School (2018)						
<b>Total Middle</b>	<b>3971</b>	<b>297</b>	<b>4268</b>	<b>3924</b>	<b>4268</b>	<b>92%</b>
<b>High Schools</b>						
Charlotte High	501	2399	2900	2040	2900	70%
Lemon Bay High	1154	523	1677	1450	1677	86%
Port Charlotte High	1947	261	2208	2040	2208	92%
<b>Total High School</b>	<b>3602</b>	<b>3183</b>	<b>6785</b>	<b>5530</b>	<b>6785</b>	<b>82%</b>
<b>Student Total</b>	<b>15051</b>	<b>4555</b>	<b>19606</b>	<b>16398</b>	<b>19425</b>	<b>83%</b>
<b>DOE Capital Outlay FTE Forecast</b>				<b>16398</b>		

Source: Charlotte County School District, 2008.

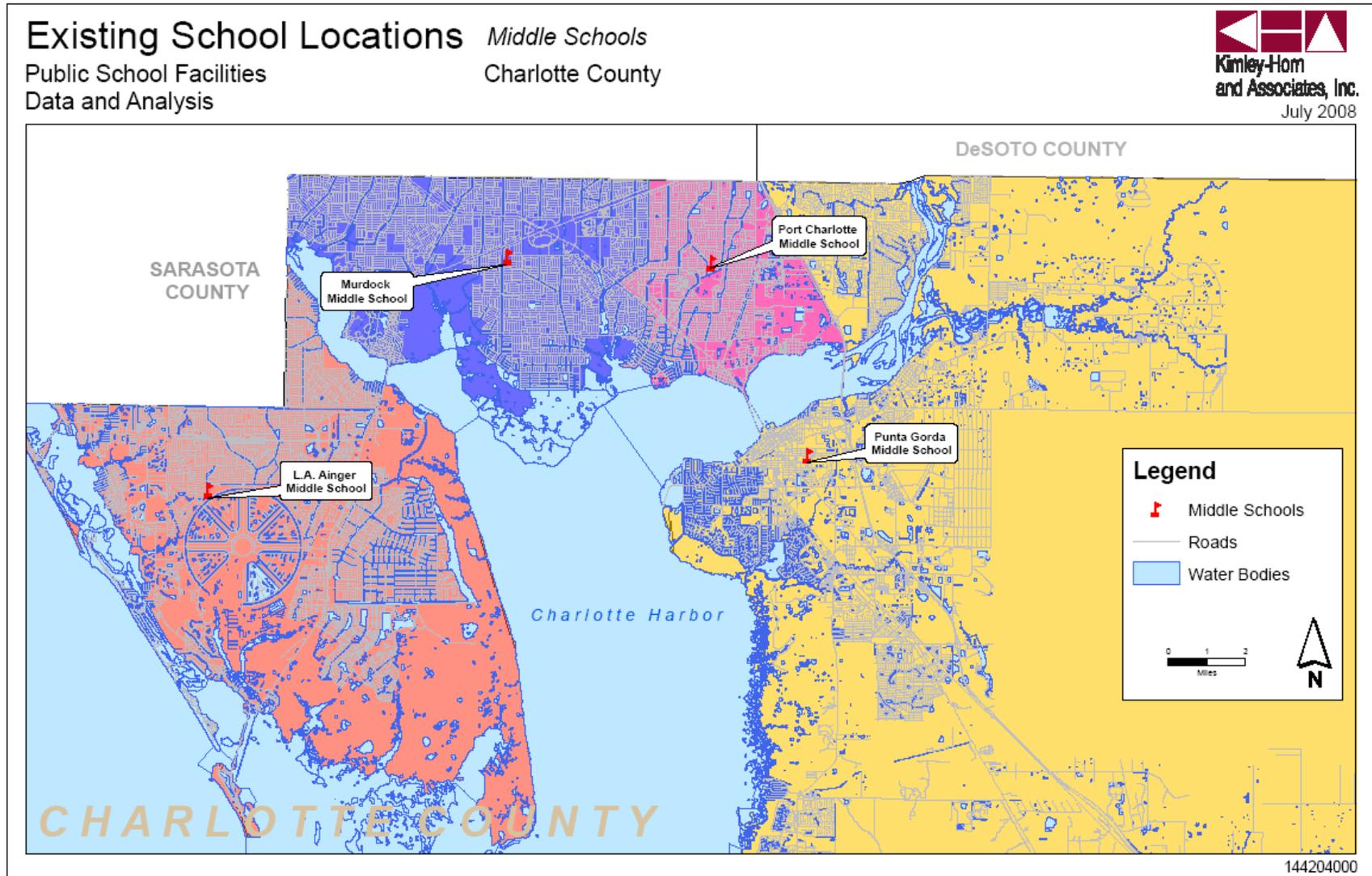
The location and school attendance boundaries of the schools identified in Table 11.7 above have been provided in Figures 11.9a, 11.9b and 11.9c. In addition to the existing school locations, the location of the existing and proposed ancillary facilities operated by the School District has been provided as Figure 11.9d.

Figure 11.9a – Existing Elementary School Location and Attendance Boundary Map



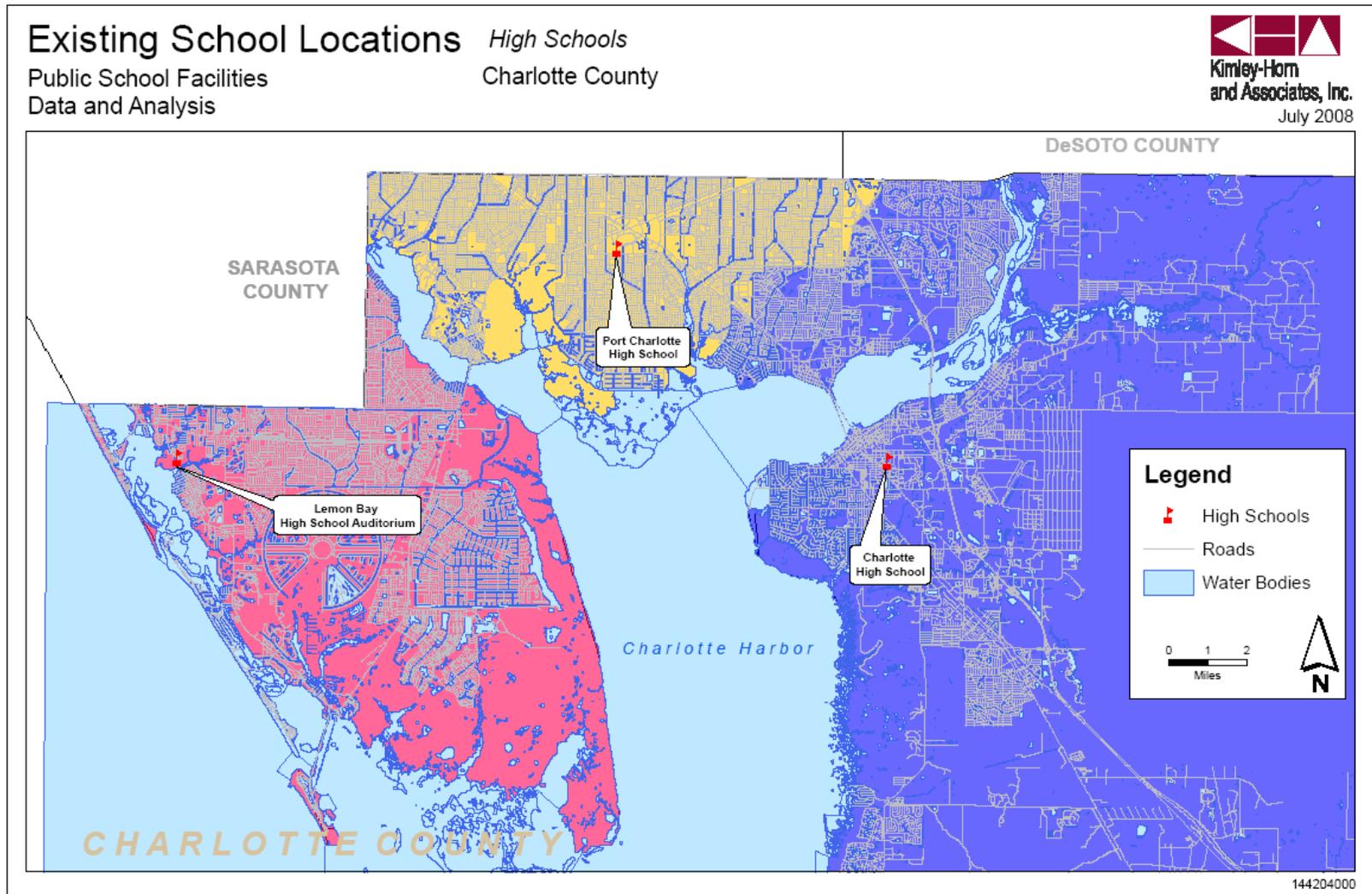
Source: Kimley-Horn and Associates, Inc.

Figure 11.9b – Existing Middle School Location and Attendance Boundary Map



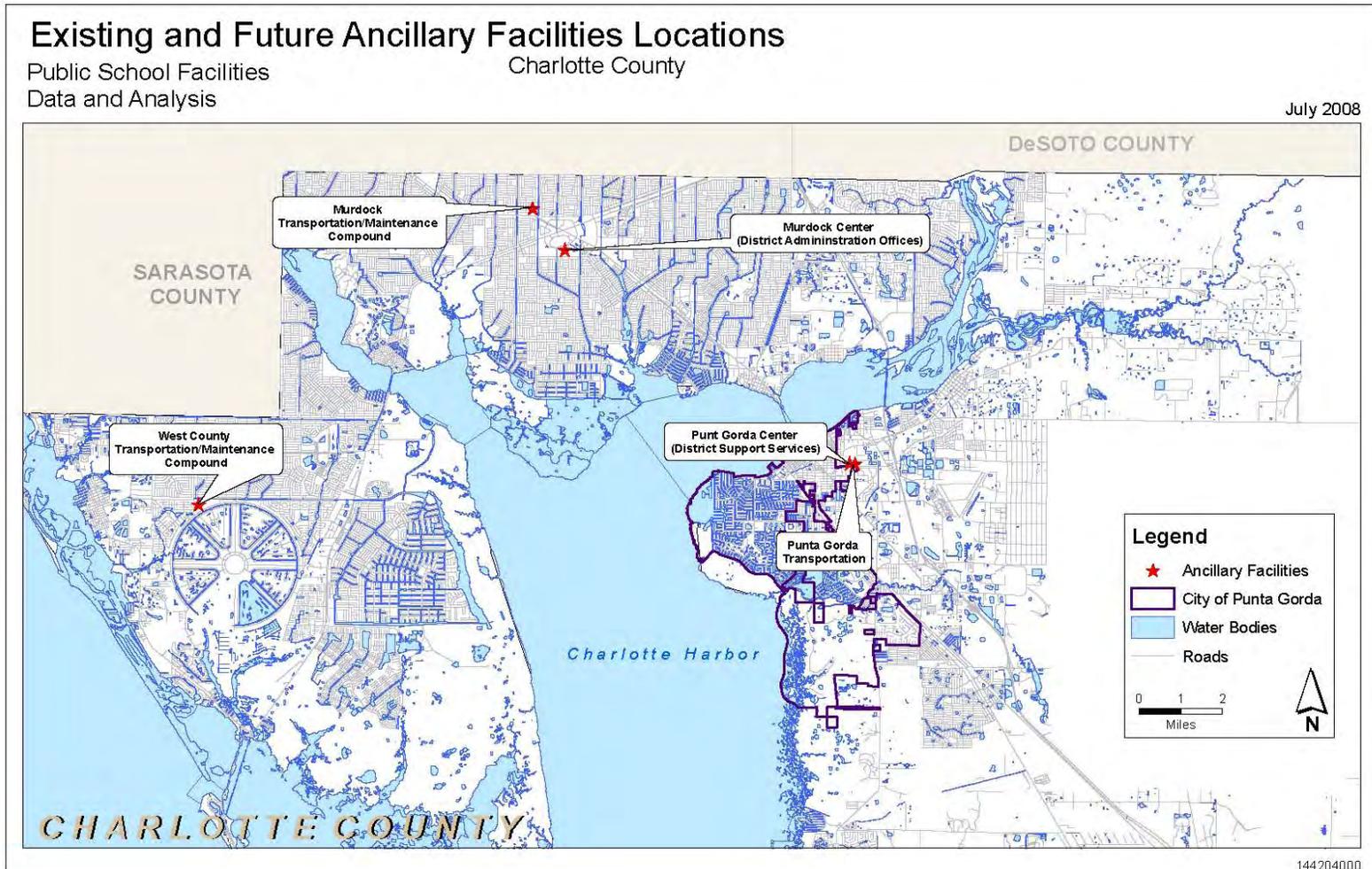
Source: Kimley-Horn and Associates, Inc.

Figure 11.9c – Existing High School Location and Attendance Boundary Map



Source: Kimley-Horn and Associates, Inc.

Figure 11.9d – Ancillary Facility Location Map



Source: Kimley-Horn and Associates, Inc.

## Demographic Trends

Charlotte County is demographically older. The median age of the population is 54 years of age, and Charlotte County's demographic composition is 96.7% Non-Hispanic. The Hispanic population has grown to 3.3% of the total population in the last five years. Although the public school population tends to follow similar patterns, it is more diverse than the County as a whole. Following a trend throughout Florida and the nation, Charlotte County's Hispanic population has been the fastest growing of all racial groups. Table 11.8 shows a comparison of the County and School District changes starting in 2000.

**Table 11.8: Population by Race and Ethnicity**

Race/Ethnicity	General Population		Student Population	
	2000	2006*	2000	2006
<b>White</b>	90.4%	92.1%	85.9%	77.9%
<b>African-American</b>	4.2%	5.5%	7.9%	8.6%
<b>Hispanic</b>	3.3%	4.7%	3.6%	7.5%
<b>Asian</b>	0.8%	1.3%	1.6%	1.7%
<b>Am.Indian/Alaskan</b>	0.2%	0.2%	0.4%	0.3%
<b>Multi-racial</b>	0.9%	0.9%	0.6%	4.0%

Source: Charlotte County Public Schools

\*Percentages obtained from U.S. Census

## Student Generation Rates

Determining the number of students generated from new residential development is necessary to accurately assess a new residential development's impact on public schools. This student generation rate allows the School District to calculate the number of new students that can be expected from a residential development, based on the number and type of residential units proposed. With the projected number of students defined, the impact of the residential development on available school capacity can be determined. A student generation multiplier was created based on the actual students residing in the various housing types. Because the number of students living in a housing unit varies depending on the type of residential housing, the student generation rate per residential unit is based on four housing types. These housing types are: single family, multi-family, condominium/cooperatives, and mobile homes.

Condominiums and cooperatives (condos and co-ops) were not aggregated with the multi-family housing type for two reasons. The real estate market for condos and co-ops differs from that of multi-family housing units, such as apartments and duplexes. The difference in housing types and their associated markets generate unique student multipliers. Historically, condos and co-ops do not generate as many students as multi-family housing units. Secondly, the specificity of the parcel data allowed for the calculation of unique generation rates for condo and co-ops and multi-family housing units.

Two datasets were used to calculate the student generation rates. These datasets were the GIS property parcel file from the Charlotte County Land Information office and October 2007 enrollment data from the School District. The student address data were geocoded to property

parcel data and street centerline data to create a GIS point file with the spatial location of each student based on their address.

This study was conducted using over 90 percent of the total student population, not a sample set, and the volume of data used was large enough to offset occasional housing type assignment errors. The total student population used in the multiplier analysis was 16,382. The student population used in the multiplier analysis is smaller than the total student population for several reasons. Students with address errors or post office box addresses were not matched to an address by geocoding. Additionally, home-schooled students and those attending non-traditional schools were not included in the analysis.

The number of students by housing type and school type are displayed in Table 11.9. This information is current as of January 2008.

**Table 11.9: Student by Residential Housing Type and School Type**

	Single Family	Condo Co-Op	Mobile Home	Multi-Family	Other
<b>Elementary (K-5)</b>	6,080	79	160	474	348
<b>Middle (6-8)</b>	3,268	43	74	154	181
<b>High (9-12)</b>	4,841	59	89	204	222
<b>Total</b>	14,189	181	323	832	751

Source: Charlotte County Land Information Department and Charlotte County School District

Table 11.10 details the 2008 housing type counts for Charlotte County. These data were obtained from the parcel GIS tax data.

**Table 11.10: Dwelling Units by Type**

	Single Family	Condo Co-Op	Mobile Home	Multi-Family	Other
<b>Occupied Dwelling Units</b>	63,262	14588	5,560	1215	6,616

Source: Charlotte County Land Information Department and Charlotte County School District

Table 11.11 shows the resulting student generation rates by unit type and school type.

**Table 11.11: Student Generation Rates**

	Single Family	Condo Co-Op	Mobile Home	Multi-Family	Other
<b>Elementary (K-5)</b>	0.10	0.01	0.03	0.39	0.05
<b>Middle (6-8)</b>	0.05	0.00	0.01	0.13	0.03
<b>High (9-12)</b>	0.08	0.00	0.02	0.17	0.03
<b>Total</b>	0.22	0.01	0.06	0.68	0.11

Source: Charlotte County Land Information Department and Charlotte County School District

## **Residential Development Student Impact**

When reviewing an application for new residential development, an analysis will be performed using the student generation rates to determine the impact of the anticipated students from the proposed development on the available capacity within the school system. If capacity is available to support the development, the development will receive school concurrency approval. If capacity does not exist, the school district and the applicable local government may entertain proportionate share mitigation options from the developer. If a proportionate share mitigation option is accepted, the developer, the school district and the applicable local government must enter into a binding and enforceable agreement.

Using the Student Generation Rates provided in Table 11.11, a new single-family residential development with 100 homes will generate 22 public school students. This equates to 10 elementary, 5 middle, and 2 high school students.

## **C. Projected Public School Facility Conditions**

### **Projected Enrollment**

Enrollment forecasting requires analysis of multiple data sources including, but not limited to, birth rates, historical enrollment trends, make-up of neighborhoods, local and regional economic and housing trends, program and boundary changes, and an empirical understanding of individual communities.

School population projections are most reliable when enrollment is projected for large geographic areas for one or two years in the future. For example, the district-wide projections for next year are expected to have a higher degree of certainty than the fifth year estimates. Conversely, accuracy diminishes as the geographic area becomes smaller and the forecast is for more distant points in the future.

The Charlotte County School District typically has prepared enrollment forecasts following a study of the local government area and school level trends. A history of each school's grade-by-grade enrollment is compiled and analyzed. This history reveals patterns in the "aging" or progression (less out-migration factors) of students from one grade to the next. These patterns are extrapolated to develop a school's basic forecast. This approach, termed the Cohort-Survivorship Model, is the most widely applied forecasting method for schools.

### **The DOE Forecast**

Around June of each year, the Florida DOE publishes grade by grade COFTE enrollment projections for every school district. The State uses a standard 'cohort survival' method using five year enrollment trends. The State's projections are an average of two 'head counts' – one in October and one in February. Table 11.12 summarizes data provided by the Florida Department of Education (DOE) and displays the population projections and projected student growth through the school year 2017/18. According to the projections of the DOE, student population is expected to decrease at a steady rate through 2011/12. The DOE enrollment projections for

school year 2017/18 show the student population continuing to grow at a slow the rate, adding 1,510 students between 2012/13 and 2017/18.

**Table 11.12: District Enrollment Projection Comparisons**

<b>School Year</b>	<b>DOE COFTE</b>	<b>Change from Previous Year</b>	<b>Percent Increase</b>
<b>2008/09</b>	16,960	-238	Decrease
<b>2009/10</b>	16,890	-70	Decrease
<b>2010/11</b>	16,768	-122	Decrease
<b>2011/12</b>	16,716	-52	Decrease
<b>2012/13</b>	16,913	197	1.1
<b>2017/18</b>	18,423	1,510	8.2

Source: Florida Department of Education, July, 2008.

Table 11.12 identifies the District’s annual enrollment projections by grade level, pre-K through grade 12 as prepared by the DOE through school year 2012-13 and 2018-2019. As can be seen in the Grade Level Summary provided in the Table, most of the student growth is expected to occur at the elementary school level. Figure 11.10a graphically illustrates the steady growth identified in the enrollment projections through school year 2012/13.

### **Use of COFTE Projections**

Using the COFTE enrollment projections pose three issues for facilities planning:

The first is timing. The school district does not know the actual COFTE enrollment until after the end of the school year and therefore does not know whether there will be changes to the forecast until two months before starting the new school year. The school district is then required to develop school by school projections that are consistent with the State’s forecast.

The second concern is the implication for the high school forecast. By using the average of two counts, the COFTE tends to under project the number of high school students that show up in the fall by including winter drop-outs from the spring count.

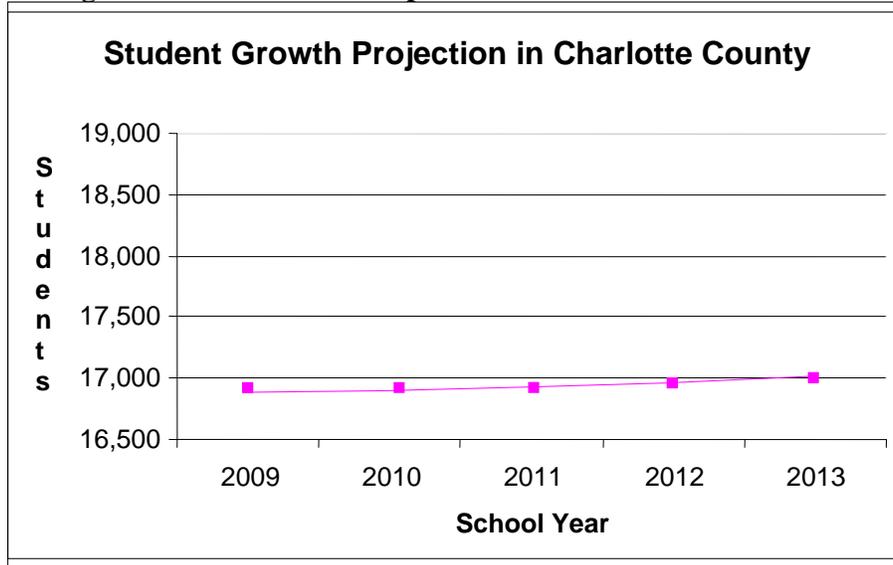
Finally, the state forecast is based on historic trends and not on local knowledge. If there is a change in the trend, the State forecast will lag behind. Consequently, the state’s COFTE forecast (displayed in Table 11.13) is used in conjunction with the School District’s enrollment forecast as a comparison of student projections, especially for the short-term planning horizon.

**Table 11.13: 2008 DOE Capital Outlay FTE Forecast**

Grade	Actual 2005-06	Actual 2006-07	Actual 2007-2008	Projected 2008-2009	Projected 2009-2010	Projected 2010-2011	Projected 2011-2012	Projected 2012-2013	Projected 2013-2014	Projected 2014-2015	Projected 2015-2016	Projected 2016-2017	Projected 2017-2018	Projected 2018-2019
Lagged Birth Data for K	1,025	1,058	976	1,056	1,028	1,106	1,161	1,202	1,228	1,252	1,271	1,290	1,310	1,332
PreK	109.98	110.39	123.63	127.89	134.49	140.18	144.16	147.12	149.67	151.93	154.24	156.73	159.34	161.77
Grade K	1,068.07	1,133.37	1,113.19	1,056.00	1,038.00	1,216.05	1,287.31	1,338.18	1,372.48	1,403.83	1,429.02	1,455.34	1,481.84	1,511.62
Grade 1	1,136.99	1,193.40	1,162.04	1,135.00	1,077.00	1,065.88	1,241.22	1,324.07	1,381.16	1,421.29	1,458.53	1,488.50	1,520.78	1,551.39
Grade 2	1,158.29	1,174.24	1,179.41	1,162.00	1,158.00	1,070.53	1,060.28	1,232.52	1,321.98	1,383.44	1,428.75	1,470.29	1,504.52	1,542.32
Grade 3	1,164.36	1,228.84	1,181.53	1,191.00	1,185.00	1,169.88	1,093.78	1,085.23	1,258.79	1,364.31	1,438.62	1,496.27	1,549.62	1,596.96
Grade 4	1,197.29	1,151.01	1,177.80	1,182.00	1,215.00	1,140.35	1,126.76	1,057.26	1,050.07	1,219.37	1,325.98	1,402.15	1,461.56	1,516.82
Grade 5	1,205.52	1,280.47	1,151.50	1,178.00	1,180.00	1,217.86	1,146.20	1,135.14	1,068.15	1,063.35	1,235.83	1,347.91	1,429.27	1,492.74
Grade 6	1,243.91	1,307.53	1,385.54	1,232.00	1,337.00	1,278.77	1,322.03	1,246.17	1,236.15	1,164.98	1,162.63	1,352.58	1,477.83	1,569.70
Grade 7	1,421.93	1,281.38	1,345.48	1,427.00	1,310.00	1,376.45	1,320.49	1,364.50	1,288.51	1,278.36	1,206.95	1,204.53	1,399.19	1,531.15
Grade 8	1,443.96	1,472.06	1,284.50	1,359.00	1,456.00	1,314.69	1,380.18	1,325.95	1,371.86	1,297.21	1,287.21	1,216.97	1,215.73	1,412.06
Grade 9	1,594.29	1,550.39	1,556.89	1,374.00	1,478.00	1,542.58	1,398.25	1,469.22	1,415.85	1,468.24	1,392.71	1,384.22	1,311.85	1,313.56
Grade 10	1,545.59	1,550.19	1,521.88	1,543.91	1,350.03	1,441.21	1,495.25	1,347.66	1,405.57	1,346.41	1,386.64	1,308.16	1,290.64	1,214.56
Grade 11	1,360.80	1,548.65	1,522.89	1,510.70	1,515.80	1,327.94	1,412.31	1,464.63	1,322.94	1,374.99	1,317.94	1,353.85	1,279.26	1,260.51
Grade 12	1,434.02	1,298.36	1,492.18	1,481.93	1,456.03	1,466.34	1,288.42	1,375.58	1,431.49	1,297.43	1,354.13	1,302.70	1,342.50	1,272.87
	<b>17,085.00</b>	<b>17,280.28</b>	<b>17,198.46</b>	<b>16,960.43</b>	<b>16,890.35</b>	<b>16,768.71</b>	<b>16,716.64</b>	<b>16,913.23</b>	<b>17,074.67</b>	<b>17,235.14</b>	<b>17,579.18</b>	<b>17,940.20</b>	<b>18,423.93</b>	<b>18,948.03</b>
<b>Grade Level Summary</b>														
PreK-5	7,040.50	7,271.72	7,089.10	7,031.89	6,987.49	7,020.73	7,099.71	7,319.52	7,602.30	8,007.52	8,470.97	8,817.19	9,106.93	9,373.62
6-8	4,109.80	4,060.97	4,015.52	4,018.00	4,103.00	3,969.91	4,022.70	3,936.62	3,896.52	3,740.55	3,656.79	3,774.08	4,092.75	4,512.91
9-12	5,934.70	5,947.59	6,093.84	5,910.54	5,799.86	5,778.07	5,594.23	5,657.09	5,575.85	5,487.07	5,451.42	5,348.93	5,224.25	5,061.50
PreK - G12	<b>17,085.00</b>	<b>17,280.28</b>	<b>17,198.46</b>	<b>16,960.43</b>	<b>16,890.35</b>	<b>16,768.71</b>	<b>16,716.64</b>	<b>16,913.23</b>	<b>17,074.67</b>	<b>17,235.14</b>	<b>17,579.18</b>	<b>17,940.20</b>	<b>18,423.93</b>	<b>18,948.03</b>
<b>Growth Summary *</b>														
PreK-5				-	-	-	67.82	219.81	282.78	405.22	463.45	346.22	289.74	266.69
6-8				-	42.03	-	-	-	-	-	-	-	318.67	420.16
9-12				-	-	-	-	-	-	-	-	-	-	-
PreK - G12				-	42.03	-	67.82	219.81	282.78	405.22	463.45	346.22	608.41	686.85
<b>PreK - G12</b>					<b>-</b>	<b>42.03</b>	<b>-</b>	<b>67.82</b>	<b>219.81</b>	<b>282.78</b>	<b>405.22</b>	<b>463.45</b>	<b>346.22</b>	

Source: Department of Education - 2008

**Figure 11.10a: Student Population Growth 2008/09-2012/13**



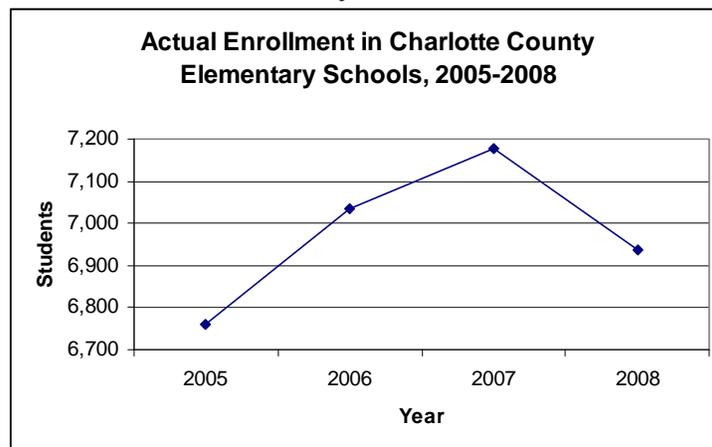
Source: Florida Department of Education, July, 2008.

**Local Forecast**

This year, the 2008 enrollment projections were prepared in the fall by the School District staff. Enrollment in Charlotte County schools is projected to grow from approximately 16,814 students in 2007 to 16,913 students in 2012 – an increase of only 99 students.

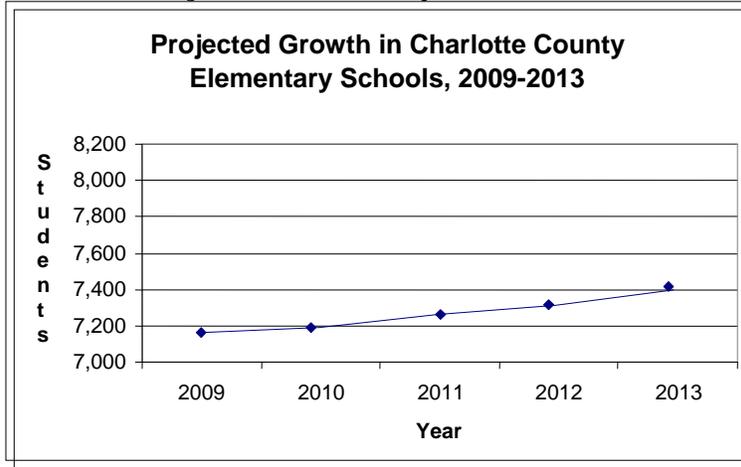
Figures 11.10b, 11.10d, and 11.10f show actual enrollment from 2005 through 2008, and Figures 11.10c, 11.10e, and 11.10g projected enrollment from 2009 through 2013 for elementary, middle, and high schools.

**Figure 11.10b: Actual Elementary School Enrollment from 2005- 2008**



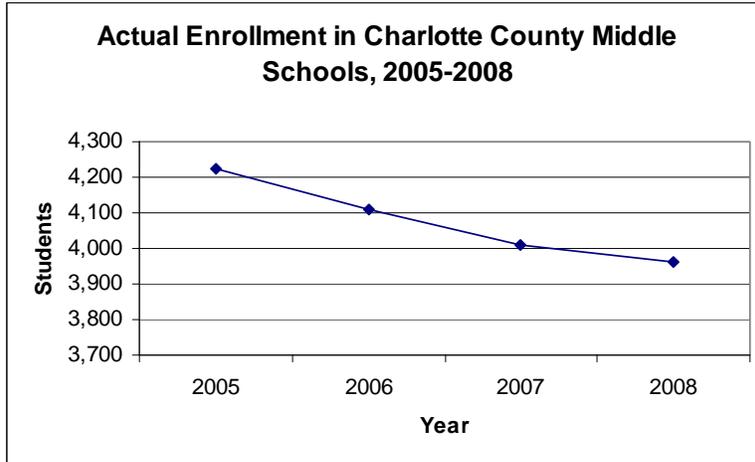
Source: Charlotte County School District and Kimley-Horn and Associates

**Figure 11.10c: Projected Elementary School Enrollment from 2009- 2013**



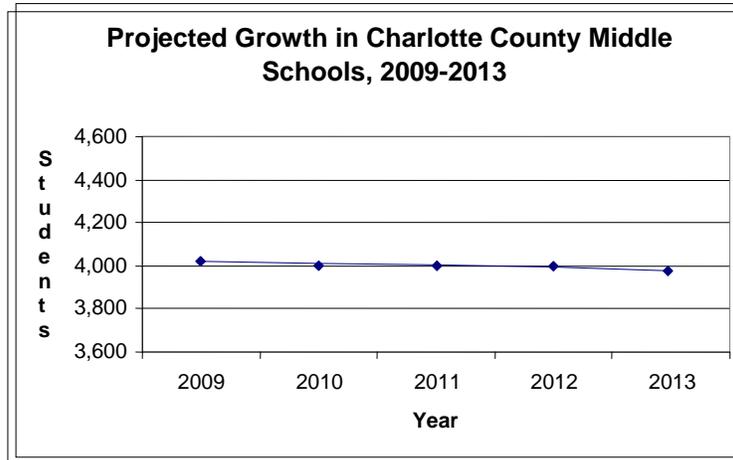
Source: Charlotte County School District and Kimley-Horn and Associates

**Figure 11.10d: Actual Middle School Enrollment from 2005- 2008**



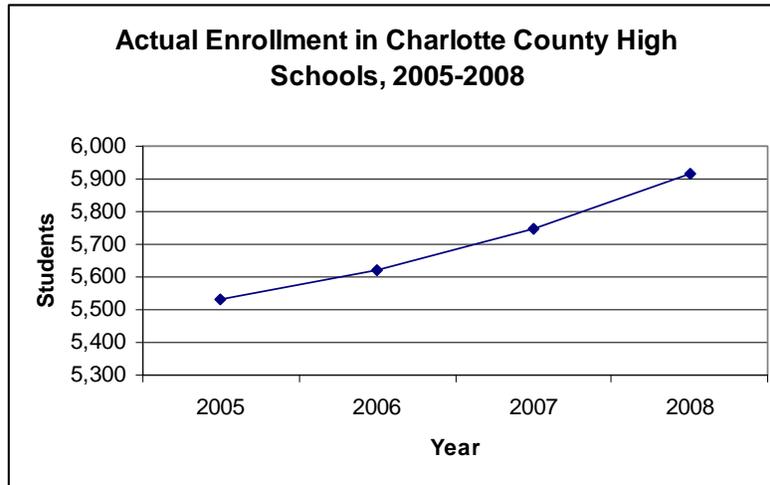
Source: Charlotte County School District and Kimley-Horn and Associates

**Figure 11.10e: Projected Middle School Enrollment from 2009-2013**



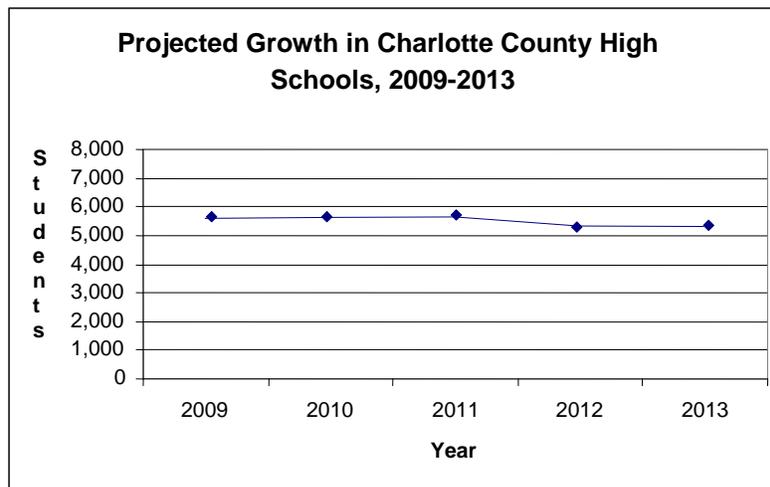
Source: Charlotte County School District and Kimley-Horn and Associates

**Figure 11.10f: Actual High School Enrollment from 2005-2008**



Source: Charlotte County School District and Kimley-Horn and Associates

**Figure 11.10g: Projected High School Enrollment from 2009-2013**

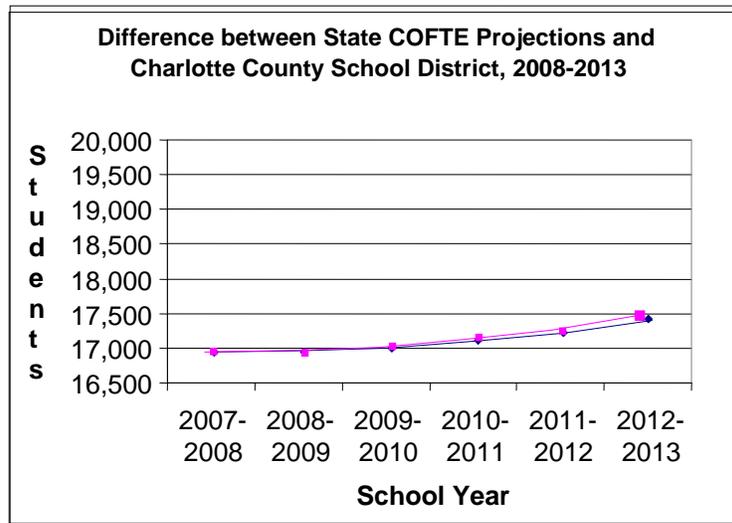


Source: Charlotte County School District and Kimley-Horn and Associates

**Comparison to the State DOE COFTE forecast**

In 2007, the State forecast projected large and steady increases for Charlotte County based on trends established in 2005-2006 and earlier. The State forecast for 2008 was reduced significantly from the 2007 estimates. Figure 11.10h shows a comparison to the Local Forecast. The local forecast shows slow growth from in-migration and slightly increasing births. Every year the forecasts are updated to reflect the most recent information – on births, housing, and grade level changes. The School District projections are identified by the pink line, and the COFTE projections are labeled in blue. Both the DOE and Charlotte County project a slight increase in students. The trends in the rest of Florida indicate that growth, while it may still occur, might remain slow for the foreseeable future.

**Figure 11.10h: COFTE and Charlotte County School District Projections**



Source: Charlotte County School District, DOE, and Kimley-Horn and Associates

**Projected Capacity (Surpluses and Deficiencies)**

School capacity may be measured several ways including, but not limited to: permanent Florida Inventory of School Houses (FISH) capacity, Total FISH capacity (includes temporary classroom facilities), core capacity, design capacity, and program capacity. Blended (alternate) measures for facility capacity can also be used. An example of an alternate method would be the use of the lesser of permanent FISH capacity or core capacity.

Permanent FISH capacity is based on the Florida Inventory of School Houses (FISH) Manual, which has been adjusted to meet the requirements for class size reduction and does not include temporary classroom facilities. Total FISH capacity counts all satisfactory student stations. Consequently, it includes both temporary and permanent student stations. Temporary capacity (relocatables) may be converted to permanent capacity when improved with walkways and technology connections. Core capacity is based on the student capacity of the common areas, such as cafeteria, and the media center. Design capacity is the number of students the school was designed for in the Educational Specifications prepared for the school. Program capacity is based on special programs offered by the School District, including English Language Learners (ELL), and various other programs for exceptional and/or handicapped students. Alternate measures of capacity may be used by the School District when permitted by the DOE.

The Charlotte County School District has chosen to use Total FISH capacity, including student stations in district owned and leased relocatables. It is the School District’s intent, to reduce the use of temporary classroom facilities over time, converting the space to permanent capacity when possible. The utilization percentage of a school is determined by dividing the student enrollment by the school’s capacity.

The School District’s school utilization is provided in Table 11.14, which displays both the current and projected utilization calculations per school and by school type through school year 2012/13 and for the 2017/18 school year, taking into account any permanent additions or new schools. Schools with utilization rates greater than 95% at elementary and 100% at middle and

high are highlighted in yellow. The school capacities marked in red indicate programmed capacity additions, capacity reductions (removal of temporary classrooms) or new schools.

Table 11.14: Charlotte County School District Utilization SY 2017-18

SCHOOL NAME	Permanent Capacity	Modular/Relocatable Capacity	Total FISH Capacity	SY 08/09				SY 09/10				SY 10/11				SY 11/12				SY 12/13				SY 17/18			
				Enroll.	Cap.	Util.	Available Seats	Enroll.	Cap.	Util.	Available Seats	Enroll.	Cap.	Util.	Available Seats	Enroll.	Cap.	Util.	Available Seats	Enroll.	Cap.	Util.	Available Seats	Enroll.	Cap.	Util.	
<b>Elementary Schools (LOS 95%)</b>																											
Sallie Jones	757		757	709	757	94%	10	700	757	92%	19	675	757	89%	44	700	757	92%	19	705	757	93%	14	715	757	94%	
East	887		887	556	706	79%	115	600	887	68%	243	640	887	72%	203	665	887	75%	178	750	887	85%	93	750	887	85%	
<b>Sub-Total Service Area (SJ,EE)</b>	<b>1644</b>	<b>0</b>	<b>1644</b>	<b>1265</b>	<b>1463</b>	<b>86%</b>	<b>125</b>	<b>1300</b>	<b>1644</b>	<b>79%</b>	<b>262</b>	<b>1315</b>	<b>1644</b>	<b>80%</b>	<b>247</b>	<b>1365</b>	<b>1644</b>	<b>83%</b>	<b>197</b>	<b>1455</b>	<b>1644</b>	<b>89%</b>	<b>107</b>	<b>1465</b>	<b>1644</b>	<b>89%</b>	
Deep Creek	707	231	938	840	938	90%	51	850	938	91%	41	850	938	91%	41	850	938	91%	41	850	938	91%	41	850	938	91%	
Kingsway	745	36	781	750	781	96%	0	700	781	90%	42	700	781	90%	42	700	781	90%	42	700	781	90%	42	705	781	90%	
Peace River	887		887	618	887	70%	225	650	887	73%	193	675	887	76%	168	700	887	79%	143	760	887	86%	83	750	887	85%	
Neil Armstrong	887		887	584	887	66%	259	625	887	70%	218	640	887	72%	203	665	887	75%	178	750	887	85%	93	725	887	82%	
Liberty	713	126	839	735	839	88%	62	675	839	80%	122	675	839	80%	122	675	839	80%	122	675	839	80%	122	675	839	80%	
Meadow Park	511	342	853	725	853	85%	85	675	853	79%	135	650	853	76%	160	625	853	73%	185	615	853	72%	195	725	853	85%	
<b>Sub-Total Service Area (DC,KE,PR,NA,LE,MP)</b>	<b>4450</b>	<b>735</b>	<b>5185</b>	<b>4252</b>	<b>5185</b>	<b>82%</b>	<b>682</b>	<b>4175</b>	<b>5185</b>	<b>81%</b>	<b>751</b>	<b>4190</b>	<b>5185</b>	<b>81%</b>	<b>736</b>	<b>4215</b>	<b>5185</b>	<b>81%</b>	<b>711</b>	<b>4350</b>	<b>5185</b>	<b>84%</b>	<b>576</b>	<b>4430</b>	<b>5185</b>	<b>85%</b>	
Myakka River	685	54	739	627	739	85%	75	625	739	85%	77	625	739	85%	77	625	739	85%	77	625	739	85%	77	650	739	88%	
Vineland	699	286	985	800	985	81%	136	800	985	81%	136	800	985	81%	136	800	985	81%	136	800	985	81%	136	850	985	86%	
New Elementary School (2015)																								825	887	93%	
New Elementary School (2016)																								800	887	90%	
<b>Sub-Total Service Area (MR,VE,E1,E2)</b>	<b>1384</b>	<b>340</b>	<b>1724</b>	<b>1427</b>	<b>1724</b>	<b>83%</b>	<b>211</b>	<b>1425</b>	<b>1724</b>	<b>83%</b>	<b>213</b>	<b>2325</b>	<b>2611</b>	<b>89%</b>													
<b>Total Elementary Schools</b>	<b>7478</b>	<b>1075</b>	<b>8553</b>	<b>6944</b>	<b>8372</b>	<b>83%</b>	<b>1017</b>	<b>6900</b>	<b>8553</b>	<b>81%</b>	<b>1225</b>	<b>6930</b>	<b>8553</b>	<b>81%</b>	<b>1195</b>	<b>7005</b>	<b>8553</b>	<b>82%</b>	<b>1120</b>	<b>7230</b>	<b>8553</b>	<b>85%</b>	<b>895</b>	<b>9020</b>	<b>10327</b>	<b>87%</b>	
<b>Middle Schools (LOS 100%)</b>																											
L.A. Ainger	927	139	1066	999	1066	94%	67	1010	1066	95%	56	975	1066	91%	91	975	1066	91%	91	975	1066	91%	91	1000	1066	94%	
Murdock Middle	867	158	1025	935	1025	91%	90	935	1025	91%	90	910	1025	89%	115	910	1025	89%	115	910	1025	89%	115	910	1025	89%	
Port Charlotte Middle	974		974	940	974	97%	34	960	974	99%	14	940	974	97%	34	945	974	97%	29	940	974	97%	34	965	974	99%	
Punta Gorda Middle	1203		1203	1050	1203	87%	153	1050	1203	87%	153	1050	1203	87%	153	1050	1203	87%	153	1025	1203	85%	178	1050	1203	87%	
New Middle School (2018)																											
<b>Total Middle</b>	<b>3971</b>	<b>297</b>	<b>4268</b>	<b>3924</b>	<b>4268</b>	<b>92%</b>	<b>344</b>	<b>3955</b>	<b>4268</b>	<b>93%</b>	<b>313</b>	<b>3875</b>	<b>4268</b>	<b>91%</b>	<b>393</b>	<b>3880</b>	<b>4268</b>	<b>91%</b>	<b>388</b>	<b>3850</b>	<b>4268</b>	<b>90%</b>	<b>418</b>	<b>3925</b>	<b>4268</b>	<b>92%</b>	
<b>High Schools (LOS 100%)</b>																											
Charlotte High	501	2399	2900	2040	2900	70%	860	1985	2900	68%	915	1975	2247	88%	272	1900	2247	85%	347	1925	2247	86%	322	1825	2247	81%	
Lemon Bay High	1154	523	1677	1450	1677	86%	227	1450	1677	86%	227	1450	1677	86%	227	1425	1677	85%	252	1425	1677	85%	252	1400	1677	83%	
Port Charlotte High	1947	261	2208	2040	2208	92%	168	1985	2208	90%	223	1975	2208	89%	233	1900	2208	86%	308	1925	2208	87%	283	1825	2208	83%	
<b>Total High School</b>	<b>3602</b>	<b>3183</b>	<b>6785</b>	<b>5530</b>	<b>6785</b>	<b>82%</b>	<b>1255</b>	<b>5420</b>	<b>6785</b>	<b>80%</b>	<b>1365</b>	<b>5400</b>	<b>6132</b>	<b>88%</b>	<b>732</b>	<b>5225</b>	<b>6132</b>	<b>85%</b>	<b>907</b>	<b>5275</b>	<b>6132</b>	<b>86%</b>	<b>857</b>	<b>5050</b>	<b>6132</b>	<b>82%</b>	
<b>Combination / Other (LOS 100%)</b>																											
The Academy/CTC	1527	228	1755	380	1755	22%	1375	430	1755	25%	1325	380	1755	22%	1375	420	1755	24%	1335	375	1755	21%	1380	250	1755	14%	
Charlotte Harbor Center	172	95	267	152	267	57%	115	155	267	58%	112	154	267	58%	113	157	267	59%	110	153	267	57%	114	149	267	56%	
Baker Pre-K Center	324		324	30	324	9%	294	30	324	9%	294	30	324	9%	294	30	324	9%	294	30	324	9%	294	30	324	9%	
<b>Total Combination / Other</b>	<b>2023</b>	<b>323</b>	<b>2346</b>	<b>562</b>	<b>2346</b>	<b>24%</b>	<b>1784</b>	<b>615</b>	<b>2346</b>	<b>26%</b>	<b>1731</b>	<b>564</b>	<b>2346</b>	<b>24%</b>	<b>1782</b>	<b>607</b>	<b>2346</b>	<b>26%</b>	<b>1739</b>	<b>558</b>	<b>2346</b>	<b>24%</b>	<b>1788</b>	<b>429</b>	<b>2346</b>	<b>18%</b>	
<b>Student Total</b>	<b>17074</b>	<b>4878</b>	<b>21952</b>	<b>16960</b>	<b>21771</b>	<b>78%</b>	<b>4400</b>	<b>16890</b>	<b>21952</b>	<b>77%</b>	<b>4634</b>	<b>16769</b>	<b>21299</b>	<b>79%</b>	<b>4102</b>	<b>16717</b>	<b>21299</b>	<b>78%</b>	<b>4154</b>	<b>16913</b>	<b>21299</b>	<b>79%</b>	<b>3958</b>	<b>18424</b>	<b>23073</b>	<b>80%</b>	
<b>DOE Capital Outlay FTE Forecast</b>				<b>16960</b>				<b>16890</b>				<b>16769</b>			<b>16717</b>				<b>16913</b>					<b>18424</b>			

Yellow Indicates a utilization rate greater than 95,100, or 100%

Red Indicates a capacity has been changed

Source: Charlotte County School District, 2008

## **Educational Facilities Survey**

One of the main documents used to plan for new educational facilities is the Educational Facilities Survey. The Educational Facilities Survey (Attachment B) is prepared once every five years and is a systematic study of present educational and ancillary facilities and is used for determining future capital needs. This Educational Facility Survey is used as a reference when formulating the 5-year District Facilities Work Program (Attachment C), which is updated and adopted annually. With each annual update to the Work Program, the District reviews the existing and projected student growth and plans for the additional capacity necessary to support the growth. Figure 11.11 identifies the location of property owned by the School District and the location future schools by school type.

## **School Facilities Long Range Plan (10 and 20 Year)**

The first five years of the Charlotte County School District's enrollment forecast are based on a standard cohort survivor model modified to reflect housing and program trends. This method is reliable for three to five years of enrollment projections. However, it is not sufficient to forecast many years into the future. Ten and twenty-year enrollment projections are based on countywide projections developed by the State of Florida Office of Economic and Demographic Research.

Projecting future enrollment is much like the art of archery – the larger and closer the target, the greater the accuracy. As the forecast attempts to predict housing development, population growth, and educational policy for ten and twenty years, it is better to look beyond individual schools and to use County level trends in population projections and zoning and land use capacity.

Approximately 16% of the Charlotte County population is currently under age 18. This percentage is projected to continue over the next 20 years even though the nation as a whole is growing older.

As of October 2007, the Charlotte County School District had approximately 16,820 students in grades kindergarten through 12. By 2017 this number is projected to grow by 8.7% to 18,424 students. Table 11.15 shows the projected enrollment thru 2018 by grade level.

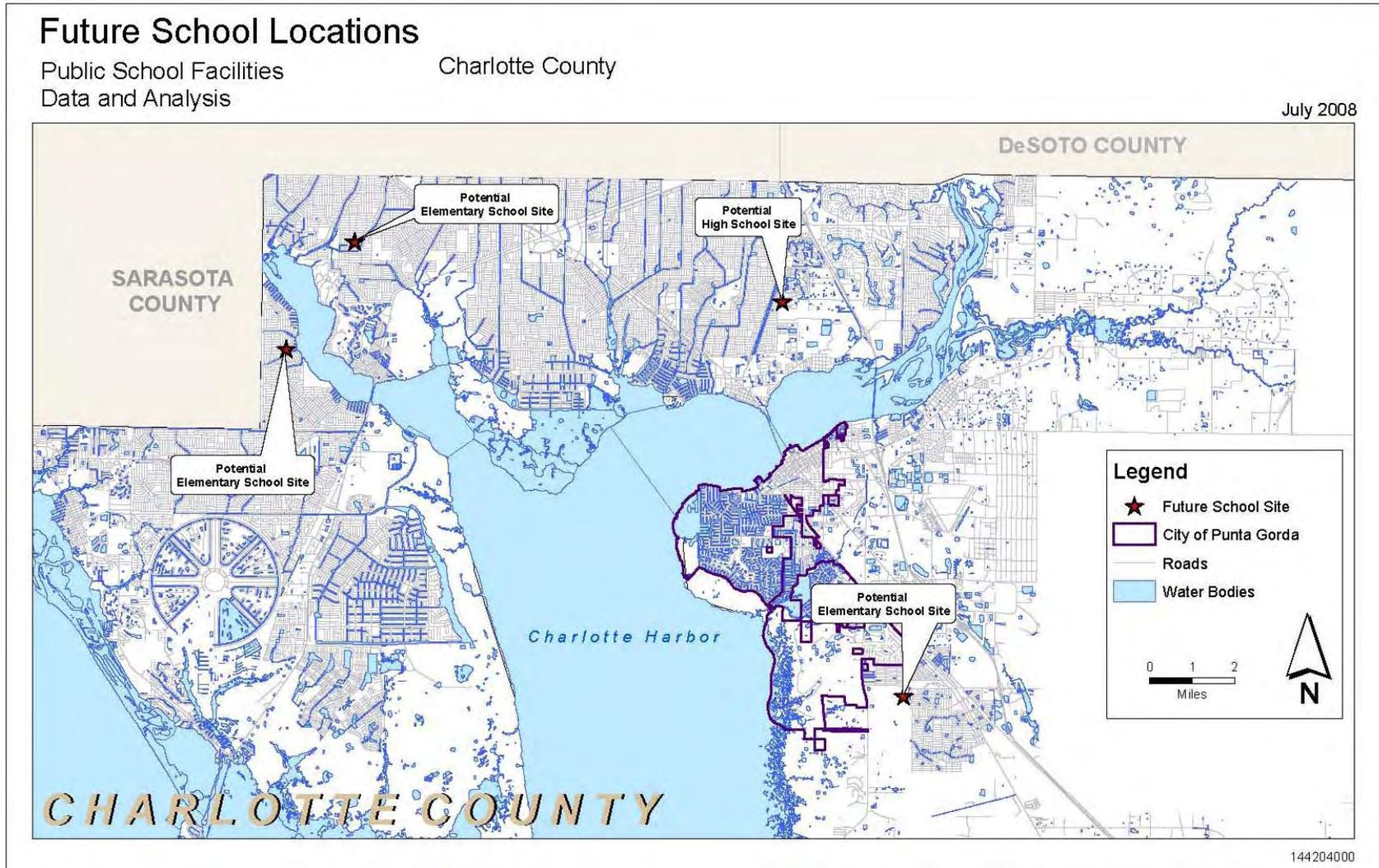
**Table 11.15 Enrollment Forecast Thru 2018**

<b>School Type</b>	<b>FY 2018 Projected Enrollment</b>
<b>Elementary</b>	9,020
<b>Middle</b>	4,045
<b>High</b>	5,050
<b>Combination / Other</b>	309
<b>Total</b>	18,424

Source: Charlotte County School District

To accommodate future growth identified outside of the current 5-year planning period, several capacity projects have been identified. Although this new capacity is subject to modification based on changes actual need (timing, location, school type), the current proposed locations of these new schools and the proposed type of school is shown below in Figure 11.11.

Figure 11.11: Future School Location Map



Source: Kimley-Horn and Associates, Inc.

## **D. Public School Facility Summary**

New development, class size reduction and special school programs create circumstances which impact the capacity available at schools to accommodate new students. Table 11.14 identifies the available capacity (utilization) at each school for the 5- year planning period. For school year 2008/09, no schools exceed a utilization of 100% (based on total FISH capacity) at the elementary, middle, or high school levels. To maintain an overall utilization of less than 100%, the School District has several options. These include monitoring programs, building additional permanent classrooms at existing schools or planning capacity for new schools. As a rule of thumb, the School District estimates the land area requirements for new school facilities to be 20 acres for elementary schools, 25 acres for middle schools, and 50 acres for high schools. These acreage estimates are very general in nature, and can vary significantly based on factors such as property location, land configuration and on-site infrastructure needs. Ancillary facilities do not have a prescribed size requirement. The following identifies the changes planned by school type:

### **Elementary Schools**

Ten elementary schools are currently operated by the Charlotte County School District. The School District anticipates that two new elementary schools will be needed within the next ten years. Based on the projected need, these new schools are planned to open in school years 2015 and 2016, and will accommodate an additional 887 student stations each. Concurrent with the opening of new schools, students will be re-boundaried to reduce capacity at schools currently needing enrollment relief.

### **Middle Schools**

The School District currently operates four middle schools. Based on the expectation of continued growth at the middle school level, the School District has planned for a new middle school which will open to provide 998 new student stations in 2018.

### **High Schools and Combination (Other) Schools**

There are three high schools and one combination school in Charlotte County. The School District had anticipated the need for one new high school in 2017. Based on current student population projections however, high school enrollment is projected to remain level or slightly decline. Consequently, the School District will be monitoring this trend to determine the need for, timing and location of a future high school.

### **Ancillary Facilities**

The School District has five ancillary facilities. These facilities include: Murdock Center (District Administration Offices), Punta Gorda Center (District Support Services), Murdock Transportation/Maintenance Compound, Punta Gorda Transportation/Maintenance Compound, and West County Transportation/Maintenance Compound. No additional facilities are required for the foreseeable future.

## **E. Level of Service**

The Level of Service (LOS) standards, which are part of the Interlocal Agreement (ILA) and adopted in the Public School Facilities Element (PSFE) and Capital Improvements Element (CIE), are used to establish maximum permissible school utilization rates relative to capacity. An essential component of determining the LOS for schools is the School District's ability to adopt a financially feasible capital program that can achieve and maintain the LOS for public schools. The school concurrency program's LOS standards balance the School District's ability to finance a capital program with its ability to achieve and maintain the adopted LOS for public schools. The establishment of a LOS ensures that new or expanded school facilities are built in time to accommodate students generated from new residential developments. If the capacity does not exist to support the students generated by the new development, both the new students and the schools are burdened with overcrowding issues.

The Florida Legislature recognizes that an essential requirement for a concurrency system is the LOS at which a public school facility is expected to operate. The new language established in Chapter 163.3177(12)(c), F.S. requires that the public school facilities element be "based upon data and analysis that address, among other things, how the LOS standards will be achieved and maintained." The ability to achieve and maintain the level of service must be based on a financially feasible Five-Year Capital Plan, adopted annually by the School Board as prescribed in Chapter 163.3180(13)(d)(1), F.S. The LOS standards for schools will be adopted into the CIE of the local governments' comprehensive plans and must apply district-wide for all schools of the same type (elementary, middle, and high) as required in Chapter 163.3180 (13)(b)(3), F.S..

### **School Level of Service for Charlotte County**

As adopted in the ILA, Charlotte County, the City of Punta Gorda and the School District have established a LOS for each school type, using Total FISH as a capacity measure for existing schools based on the School Districts financially feasible 5-year District Facilities Work Program. Table 11.16 below indicates the LOS for each type of school.

**Table 11.16: School Level of Service**

<b>Type of School</b>	<b>Level of Service</b>
<b>Elementary</b>	95%
<b>Middle</b>	100%
<b>High</b>	100%

Source: Charlotte County Interlocal Agreement for Public School Facility Planning.

With the school LOS established, the designation of the area within which the LOS will be measured when an application for a residential development permit is reviewed for school concurrency purposes must be determined.

## **F. School Concurrency Service Areas**

School Concurrency Service Areas (CSA) are the geographic areas in which the LOS standard is measured when an application for residential development is reviewed for school concurrency purposes. A fundamental requirement of school concurrency is the establishment of these areas. This includes the option to establish a district-wide (the entire County) CSA, or less than district-wide (smaller geographic areas) CSAs. These CSAs are used to determine whether adequate capacity is available to accommodate new students generated from residential development.

The legislature allows school concurrency to be applied district-wide initially, but requires that it be applied on a less than district wide basis within five years of adoption (Chapter 163.3180(13)(c)1, FS). When applying school concurrency less than district-wide, the school district is required to maximize utilization of their schools and to apply “adjacency” when reviewing residential development. Maximizing utilization requires the School District to evaluate school enrollment and attempt to balance the enrollment by shifting children from schools that are over capacity to schools that are under capacity to the greatest extent possible. To ensure the School District is maximizing utilization of schools to the greatest extent possible, new residential development can take into consideration adjacent CSA capacity when none exists in the directly impacted service area (adjacency).

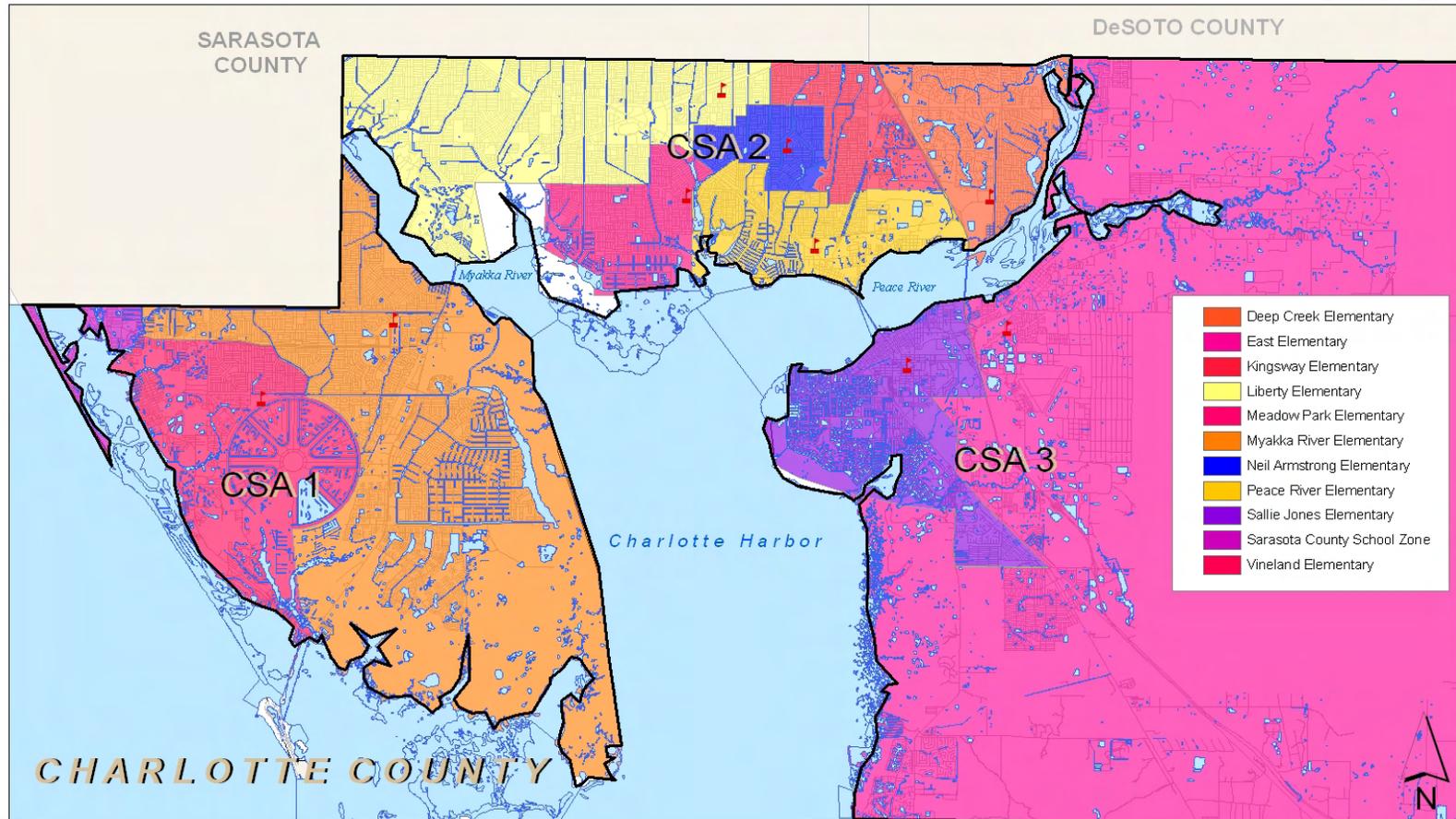
### **School Concurrency Service Areas for Charlotte County**

Currently, the School District, the County and the city of Punta Gorda have decided to use less than district-wide CSA. Separate service area boundary maps have been created for elementary, middle, and high schools.

Using separate CSA’s for the elementary, middle, and high schools allows the impact of new residential development to be analyzed and determined at each type of school. The review for available capacity will also occur at the schools most likely to be impacted by the new residential development. If available capacity is not present, the adjacent school CSA will be analyzed for capacity. Figures 11.12a, 11.12b, and 11.12c identify the CSA boundaries. The accompanying utilization Tables 11.17a, 11.17b, and 11.17c show the overall utilization of each CSA for the 5-year planning period.

**Figure 11.12a: Elementary School Concurrency Service Area Map**  
**Proposed Elementary School Concurrency Service Areas**  
**Charlotte County**

  
 Kimley-Horn  
 and Associates, Inc.  
 December 2007



144204000

Source: Kimley-Horn and Associates, Inc.

Table 11.17a: Elementary School Utilization by Concurrency Service Area

Elementary CSA 1	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Vineland	699	286	985	800	985	81%	800	985	81%	800	985	81%	800	985	81%	800	985	81%
Myakka River	685	54	739	627	739	85%	625	739	85%	625	739	85%	625	739	85%	625	739	85%
New Elementary School (2015)																		
New Elementary School (2016)																		
<b>Total</b>	<b>1384</b>	<b>340</b>	<b>1724</b>	<b>1427</b>	<b>1724</b>	<b>83%</b>	<b>1425</b>	<b>1724</b>	<b>83%</b>									

SY 17/18		
Enroll.	Cap.	Util.
850	985	86%
650	739	88%
825	887	93%
800	887	90%
<b>2325</b>	<b>2611</b>	<b>89%</b>

Elementary CSA 2	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Neil Armstrong	887		887	584	887	66%	625	887	70%	640	887	72%	665	887	75%	750	887	85%
Peace River	887		887	618	887	70%	650	887	73%	675	887	76%	700	887	79%	760	887	86%
Liberty	713	126	839	735	839	88%	675	839	80%	675	839	80%	675	839	80%	675	839	80%
Kingsway	745	36	781	750	781	96%	700	781	90%	700	781	90%	700	781	90%	700	781	90%
Deep Creek	707	231	938	840	938	90%	850	938	91%	850	938	91%	850	938	91%	850	938	91%
Meadow Park	511	342	853	725	853	85%	675	853	79%	650	853	76%	625	853	73%	615	853	72%
<b>Total</b>	<b>4450</b>	<b>735</b>	<b>5185</b>	<b>4252</b>	<b>5185</b>	<b>82%</b>	<b>4175</b>	<b>5185</b>	<b>81%</b>	<b>4190</b>	<b>5185</b>	<b>81%</b>	<b>4215</b>	<b>5185</b>	<b>81%</b>	<b>4350</b>	<b>5185</b>	<b>84%</b>

SY 17/18		
Enroll.	Cap.	Util.
725	887	82%
750	887	85%
675	839	80%
705	781	98%
850	938	91%
725	853	85%
<b>4430</b>	<b>5185</b>	<b>85%</b>

Elementary CSA 3	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Sallie Jones	757		757	709	757	94%	700	757	92%	675	757	89%	700	757	92%	705	757	93%
East	887		887	556	887	63%	600	887	68%	640	887	72%	665	887	75%	750	887	85%
<b>Total</b>	<b>1644</b>	<b>0</b>	<b>1644</b>	<b>1265</b>	<b>1644</b>	<b>78%</b>	<b>1300</b>	<b>1644</b>	<b>79%</b>	<b>1315</b>	<b>1644</b>	<b>80%</b>	<b>1365</b>	<b>1644</b>	<b>83%</b>	<b>1455</b>	<b>1644</b>	<b>89%</b>

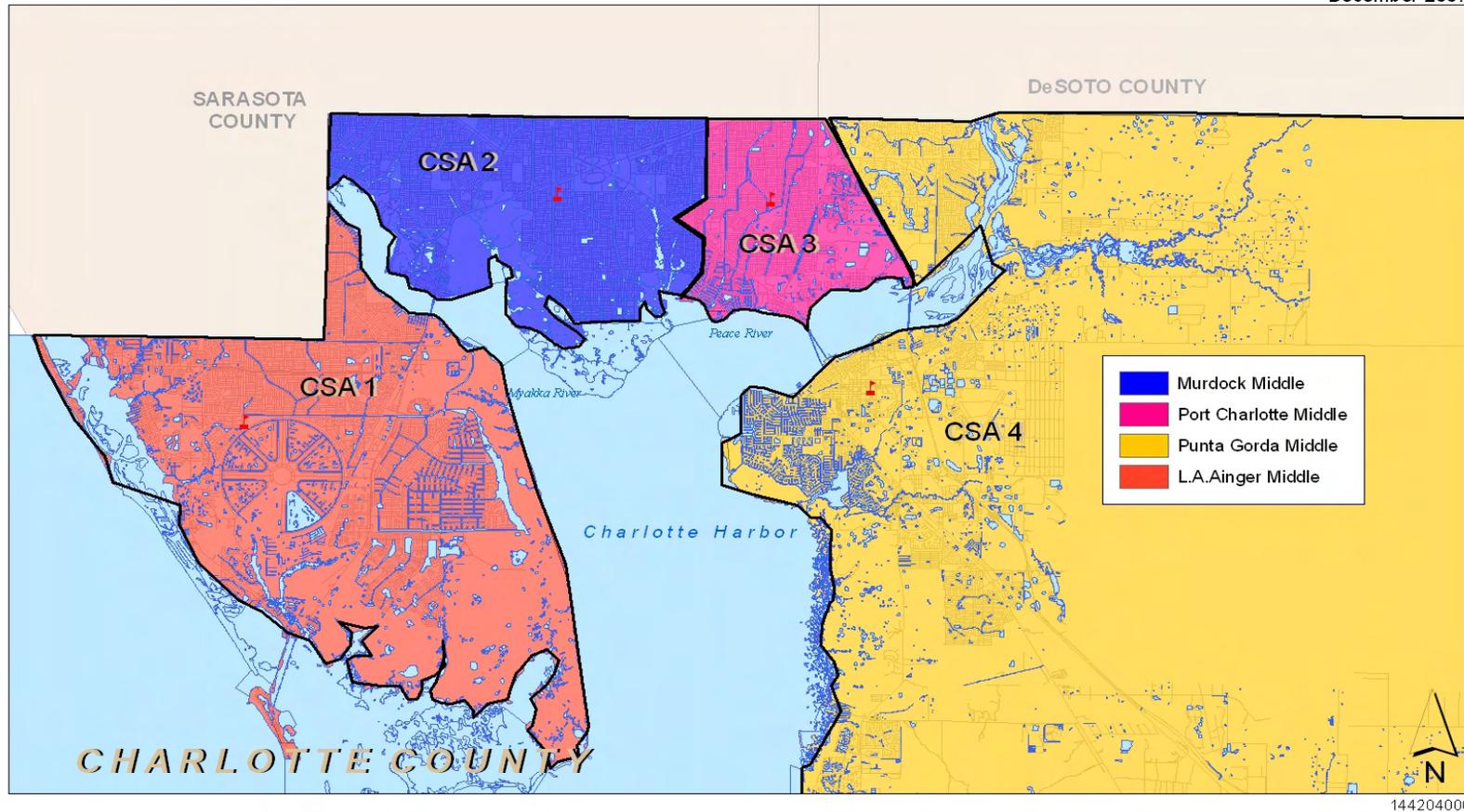
SY 17/18		
Enroll.	Cap.	Util.
715	757	94%
750	887	85%
<b>1465</b>	<b>1644</b>	<b>89%</b>

Source: Kimley-Horn and Associates

Figure 11.12b: Middle Schools Concurrency Service Area Map

### Proposed Middle School Concurrency Service Areas Charlotte County

  
Kimley-Horn  
and Associates, Inc.  
December 2007



Source: Kimley-Horn and Associates, Inc.

Table 11.17b: Middle School Utilization by Concurrency Service Area

Middle School CSA 1	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.
L.A. Ainger	927	139	1066	999	1066	94%	1010	1066	95%	975	1066	91%	975	1066	91%	975	1066	91%
New Middle School (2018)																		
<b>Total</b>	<b>927</b>	<b>139</b>	<b>1066</b>	<b>999</b>	<b>1066</b>	<b>94%</b>	<b>1010</b>	<b>1066</b>	<b>95%</b>	<b>975</b>	<b>1066</b>	<b>91%</b>	<b>975</b>	<b>1066</b>	<b>91%</b>	<b>975</b>	<b>1066</b>	<b>91%</b>

SY 17/18		
Enroll.	Cap.	Util.
1000	1066	94%
<b>1000</b>	<b>1066</b>	<b>94%</b>

Middle School CSA 2	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Murdock Middle	867	158	1025	935	1025	91%	935	1025	91%	910	1025	89%	910	1025	89%	910	1025	89%
<b>Total</b>	<b>867</b>	<b>158</b>	<b>1025</b>	<b>935</b>	<b>1025</b>	<b>91%</b>	<b>935</b>	<b>1025</b>	<b>91%</b>	<b>910</b>	<b>1025</b>	<b>89%</b>	<b>910</b>	<b>1025</b>	<b>89%</b>	<b>910</b>	<b>1025</b>	<b>89%</b>

SY 17/18		
Enroll.	Cap.	Util.
910	1025	89%
<b>910</b>	<b>1025</b>	<b>89%</b>

Middle School CSA 3	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Port Charlotte Middle	974		974	940	974	97%	960	974	99%	940	974	97%	945	974	97%	940	974	97%
<b>Total</b>	<b>974</b>	<b>0</b>	<b>974</b>	<b>940</b>	<b>974</b>	<b>97%</b>	<b>960</b>	<b>974</b>	<b>99%</b>	<b>940</b>	<b>974</b>	<b>97%</b>	<b>945</b>	<b>974</b>	<b>97%</b>	<b>940</b>	<b>974</b>	<b>97%</b>

SY 17/18		
Enroll.	Cap.	Util.
965	974	99%
<b>965</b>	<b>974</b>	<b>99%</b>

Middle School CSA 4	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Punta Gorda Middle	1203		1203	1050	1203	99%	1050	1203	99%	1050	1203	99%	1050	1203	99%	1025	1203	97%
<b>Total</b>	<b>1203</b>	<b>0</b>	<b>1203</b>	<b>1050</b>	<b>1203</b>	<b>99%</b>	<b>1025</b>	<b>1203</b>	<b>97%</b>									

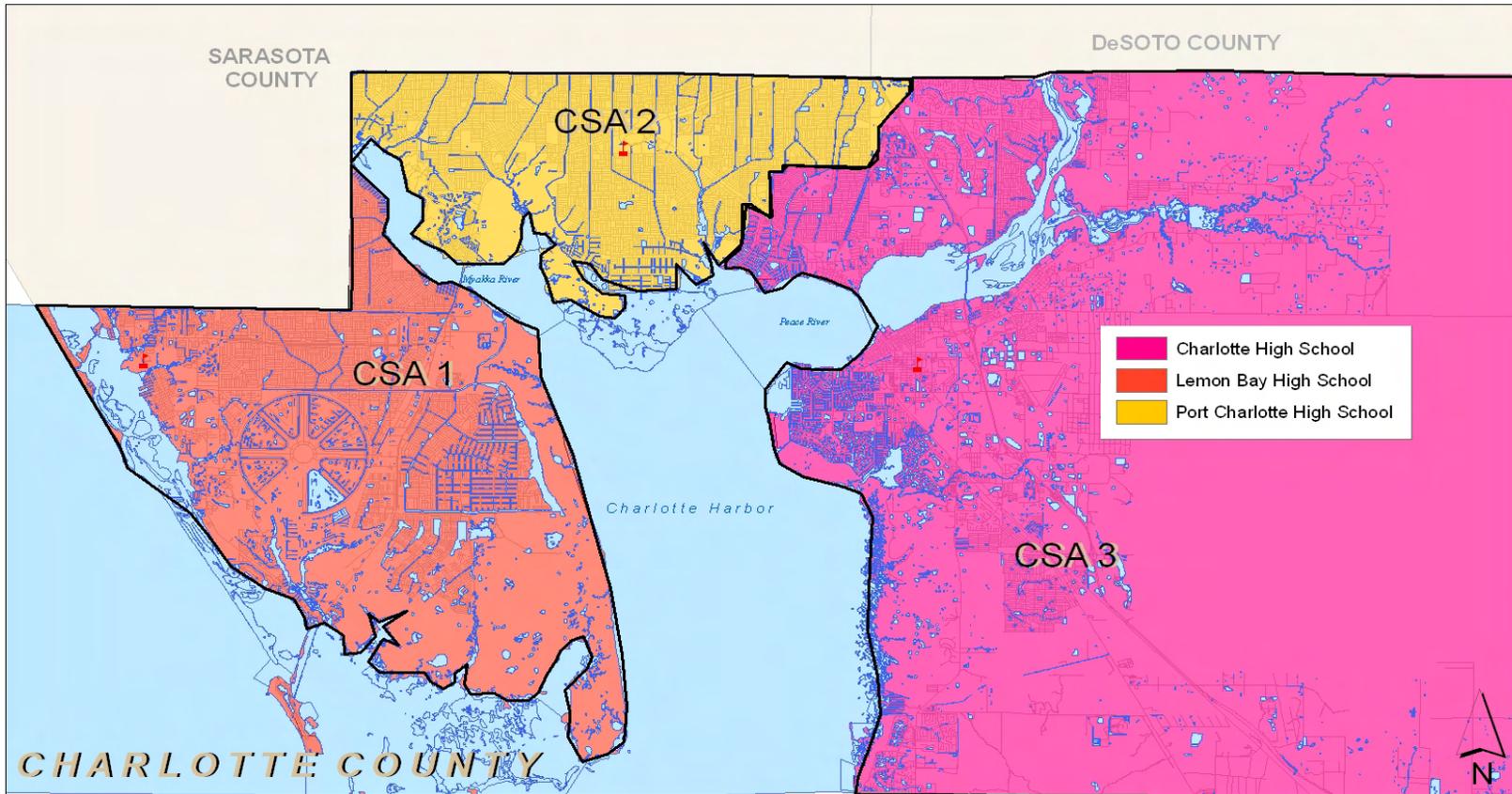
SY 17/18		
Enroll.	Cap.	Util.
1050	1203	99%
<b>1050</b>	<b>1203</b>	<b>99%</b>

Source: Kimley-Horn and Associates

Figure 11.12c: High School Concurrency Service Area Map

### Proposed High School Concurrency Service Areas Charlotte County

  
Kimley-Horn  
and Associates, Inc.  
December 2007



144204000

Source: Kimley-Horn and Associates, Inc.

Table 11.17c: High School Utilization by Concurrency Service Area

High Schools CSA 1	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Lemon Bay High	1154	523	1677	1450	1677	86%	1450	1677	86%	1450	1677	86%	1425	1677	85%	1425	1677	85%
<b>Total High School</b>	<b>1154</b>	<b>523</b>	<b>1677</b>	<b>1450</b>	<b>1677</b>	<b>86%</b>	<b>1450</b>	<b>1677</b>	<b>86%</b>	<b>1450</b>	<b>1677</b>	<b>86%</b>	<b>1425</b>	<b>1677</b>	<b>85%</b>	<b>1425</b>	<b>1677</b>	<b>85%</b>

SY 17/18		
Enroll.	Cap.	Util.
1400	1677	83%
<b>1400</b>	<b>1677</b>	<b>83%</b>

High Schools CSA 2	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.												
Port Charlotte High	1947	261	2208	2040	2208	92%	1985	2208	90%	1975	2208	89%	1900	2208	86%	1925	2208	87%
<b>Total High School</b>	<b>1947</b>	<b>261</b>	<b>2208</b>	<b>2040</b>	<b>2208</b>	<b>92%</b>	<b>1985</b>	<b>2208</b>	<b>90%</b>	<b>1975</b>	<b>2208</b>	<b>89%</b>	<b>1900</b>	<b>2208</b>	<b>86%</b>	<b>1925</b>	<b>2208</b>	<b>87%</b>

SY 17/18		
Enroll.	Cap.	Util.
1825	2208	83%
<b>1825</b>	<b>2208</b>	<b>83%</b>

High Schools CSA 3	Permanent Capacity	Modular / Relocatable Capacity	TOTAL FISH Capacity	SY 08/09			SY 09/10			SY 10/11			SY 11/12			SY 12/13		
				Enroll.	Cap.	Util.	Enroll.	Cap.	Util.									
Charlotte High	501	2399	2900	2040	2900	70%	1985	2900	68%	1975	2247	88%	1900	2247	109%	1925	2247	86%
<b>Total High School</b>	<b>501</b>	<b>2399</b>	<b>2900</b>	<b>2040</b>	<b>2900</b>	<b>70%</b>	<b>1985</b>	<b>2900</b>	<b>68%</b>	<b>1975</b>	<b>2247</b>	<b>88%</b>	<b>1900</b>	<b>2247</b>	<b>109%</b>	<b>1925</b>	<b>2247</b>	<b>86%</b>

SY 17/18		
Enroll.	Cap.	Util.
1825	2247	81%
<b>1825</b>	<b>2247</b>	<b>81%</b>

Source: Kimley-Horn and Associates

## **G. Co-location / Joint-Use Analysis**

Co-location and joint-use of facilities is required as a portion of the data and analysis requirement of Rule 9J-5.025, F.A.C for the Public School Facility Element. Charlotte County's Updated Interlocal Agreement for Coordinated Planning and School Concurrency (ILA) requires consideration of co-location and shared use in Section 9 of the Agreement. The co-location or joint use of facilities enhances the ability of schools to serve as community focal points, and provides local governments and the School District an opportunity to realize a financial savings by sharing facilities. Figure 11.13 identifies the location of public facilities or sites in Charlotte County which could be used for co-location or joint use of facilities.

### **Budget Considerations**

Co-location and shared use of facilities are important tools in budgeting and community building for the School Board and local governments. According to the ILA, the School Board will look for opportunities to co-locate and share use of school and civic facilities when preparing its Educational Facilities Plan. Likewise, co-location and shared use opportunities shall be considered by the local governments when updating their comprehensive plan's schedule of capital improvements and when planning and designing new, or renovating existing, community facilities.

### **Public Opportunity**

Because 35% of the population is 65 years or older, more leisure and cultural activities are desirable in the community. Middle and high schools are particularly well equipped to serve as community centers because of the capacity, parking and multi-purpose classrooms. Community associations and private organizations serving a range of needs could utilize schools located away from more populated areas. Consequently, middle and high schools should provide opportunities for community use when feasible. Elementary schools may offer opportunities for use of their large rooms, such as cafeterias or libraries.

### **School Opportunity**

The School District would benefit from joint use of parks adjacent to or in the vicinity of public schools. This includes the shifting of recreational facilities to adjacent parks to reduce maintenance costs or the amount of property needed to accommodate the new school. As shown in Figure 11.13, there are several opportunities for joint use of existing facilities and proposed school sites.

### **Development Opportunity**

Co-location is intended to provide efficient use of existing infrastructure and discourage sprawl. Identification early in a budget cycle and coordination among agencies will promote successful and effectively utilized public facilities. Cost effective co-location or joint use of School District, County, or City owned property could provide substantial savings for public facilities for existing and future facilities. Through the development approval process, local governments should encourage residential developers to consider setting aside land for public facilities such as parks and libraries near existing or planned public schools to serve both the existing and future residents of the County.

### **Mutual Use Agreements**

For each instance of co-location and shared use, the School District and local government shall enter into a separate mutual use agreement addressing legal liability, operating and maintenance costs, scheduling of use, facility supervision, and any other issues that may arise from co-location and joint use.

### **Emergency Preparedness**

During emergencies, the School Board coordinates with the County's Emergency Management Office concerning the use of schools as shelters.

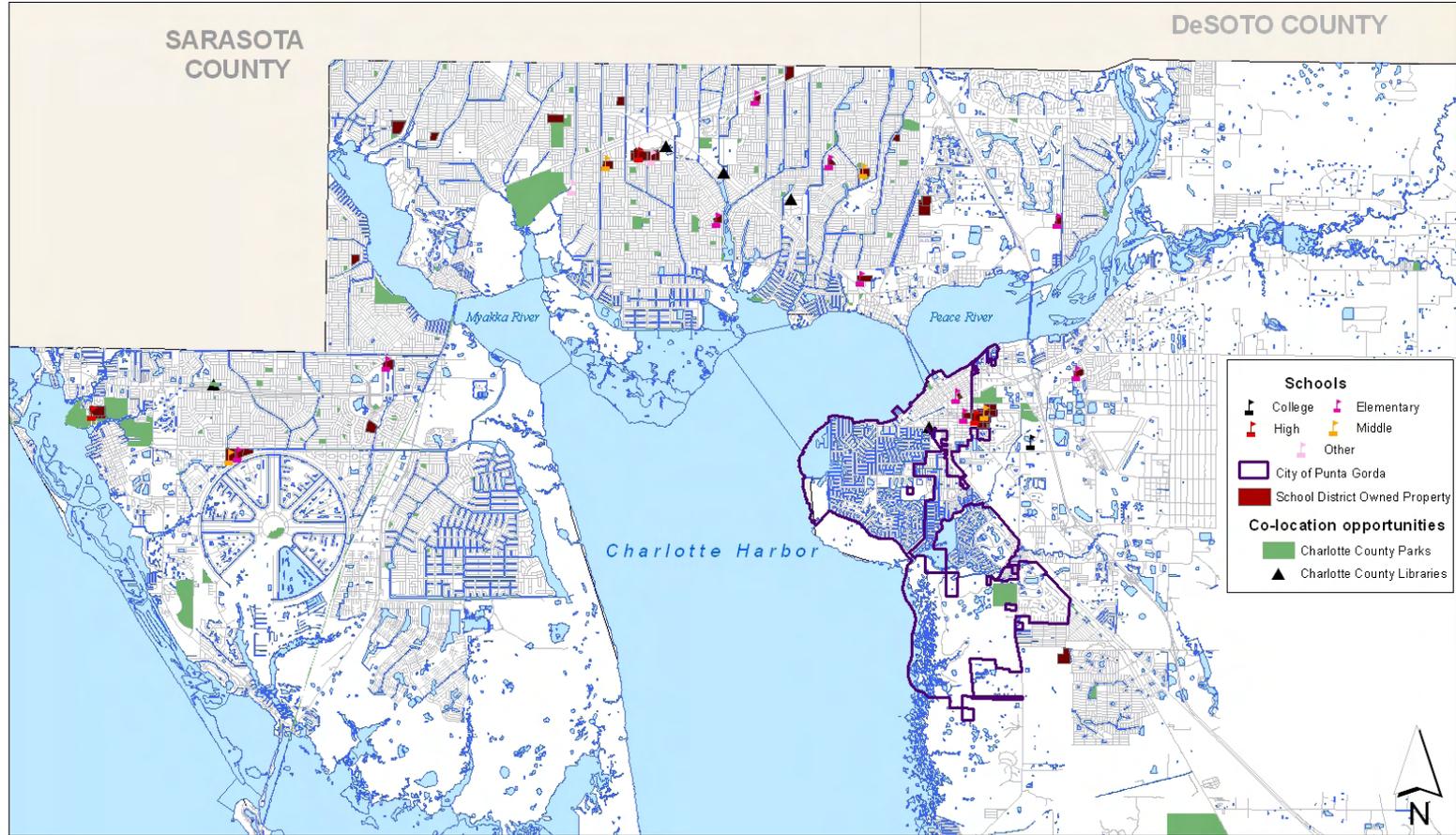
Hurricane evacuation and shelter efforts are coordinated by the County Emergency Management Office, the Red Cross, the State Emergency Operations Center in Tallahassee, and all other Florida counties. The decision to open shelters is done together with the County and the School Board. Under Chapter 252, Florida Statutes, suitable school facilities must be made available to the Emergency Operations Center; this includes schools, buses and cafeterias.

The Charlotte County Emergency Management Office has direct communication with the local Red Cross headquarters at all times. In the event of activation of the County Emergency Operations Center, the Red Cross would send a liaison to help with the coordination of registration at the shelters. Charlotte County and Punta Gorda are parties to a State-wide mutual aid agreement. The County Emergency Management Office is in constant communication with the DCA Division of Emergency Management, and the County has the capability to link via satellite with any other County. All of these agreements and coordination efforts are vitally important to the safety of people in Charlotte County. Further coordination to try to establish hurricane shelters outside of the Category 3 Hurricane Vulnerability Zone is necessary to ensure that safety. The County should pursue agreements with public and private agencies which own land in such places to cooperatively develop evacuation shelters or to ensure that any development on such properties would include shelter capacity.

Figure 11.13: Co-Location Opportunities

# Co- location Opportunities Charlotte County

  
Kimley-Horn  
and Associates, Inc.  
January 2008



## **H. School District Capital Improvements and Revenue Sources**

### **School District Capital Improvements**

The School District's Five-Year Tentative Facilities Work Program is the foundation of an annual planning process that allows the School District to effectively address changing enrollment patterns, development, and growth. It is updated and adopted each year, and provides details of district-wide capital improvement needs, funding availability and a proposed schedule for addressing the improvements. Identified in the Work Program are proposed projects that are needed to address existing and future projected capacity needs.

With the passage of Senate Bill 360 in 2005, local governments are now required to annually adopt the School District's adopted 5-year District Facilities Work Program into the Capital Improvements Element (CIE) of their respective Comprehensive Plans. Therefore, the School District's work program must be financially feasible and formally adopted by the School Board each year. The adopted work program will be used to demonstrate how the School District can achieve and maintain the adopted LOS standards for schools.

Table 11.18 provides a listing of the School District's Capacity Project Schedules over the five-year planning period, adopted by the Charlotte County School Board in September 2007. It provides the schedule of capital outlay projects, and the expenditures for each school, necessary to ensure the availability of satisfactory classrooms for the projected student enrollment in K-12 programs for a five-year planning period. Table 11.18 also includes project descriptions of major renovations, remodeling projects, and additions of capital outlay projects that do not add capacity to schools.

**Table 11.18: Capital Improvements Summary, 2007/08 – 2011/12**

Summary of 5-Year District Facilities Capital Improvements

Project	FY 2007 -2012	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011
<b>Capacity Project Schedule</b>						
Benjamin J Baker Elementary (Hurricane Replacement)	\$4,255,356	\$4,255,356	\$0	\$0	\$0	\$0
Charlotte Senior High (Hurricane Replacement)	\$86,741,941	\$37,651,196	\$26,676,942	\$22,413,803	\$0	\$0
Charlotte Technical Center (Remodel, renovate, new construction, site work)	\$41,518,651	\$12,109,229	\$3,037,727	\$4,176,645	\$9,856,824	\$12,338,226
Charlotte Senior High (Auxiliary gym/multipurpose room)	\$871,675	\$871,675	\$0	\$0	\$0	\$0
East Elementary (Hurricane Replacement)	\$22,125,388	\$22,125,388	\$0	\$0	\$0	\$0
Lemon Bay Senior High (New construction, remodel, renovations, and site work)	\$90,000,000	\$7,991,445	\$26,305,968	\$10,194,032	\$23,877,451	\$21,631,104
Neil Armstrong Elementary (Hurricane Replacement)	\$11,324,287	\$11,324,287	\$0	\$0	\$0	\$0
Peace River Elementary (Hurricane Replacement)	\$13,139,208	\$13,139,208	\$0	\$0	\$0	\$0
Port Charlotte Senior High (Auxiliary gym/multipurpose room, remodel two classrooms)	\$1,001,040	\$1,001,040	\$0	\$0	\$0	\$0
Punta Gorda Middle (Hurricane Replacement)	\$23,871,068	\$14,796,069	\$9,074,999	\$0	\$0	\$0
<b>New Construction Subtotal</b>	<b>\$294,848,614</b>	<b>\$ 72,757,488</b>	<b>\$ 29,714,669</b>	<b>\$ 26,590,448</b>	<b>\$ 9,856,824</b>	<b>\$ 2,338,226</b>

**Other Project Schedules**

Charlotte Senior High Stadium and Auditorium	\$3,582,828	\$3,582,828	\$0	\$0	\$0	\$0
East Elementary Renovate Buildings 12 and 13	\$2,000,000	\$194,032	\$0	\$1,805,968	\$0	\$0
Lemon Bay Senior High Renovation of restrooms	\$200,000	\$200,000	\$0	\$0	\$0	\$0
Murdock Transportation Renovation	\$89,146	\$89,146	\$0	\$0	\$0	\$0

Land Acquisitions, Unspecified Location	\$4,000,000	\$2,000,000	\$0	\$0	\$0	\$2,000,000
Punta Gorda Center, Bush Wash facility, Special projects etc.	\$10,148,000	\$4,498,000	\$5,650,000	\$0	\$0	\$0
Hurricane shutters, lightning protection, Unspecified location	\$2,572,248	\$2,572,248	\$0	\$0	\$0	\$0
Charlotte Technical Center The Academy-QZAB	\$100,000	\$100,000	\$0	\$0	\$0	\$0
Charlotte Harbor School QZAB	\$100,000	\$100,000	\$0	\$0	\$0	\$0
Neil Armstrong Elementary QZAB	\$100,000	\$100,000	\$0	\$0	\$0	\$0
Port Charlotte Senior High QZAB	\$750,000	\$750,000	\$0	\$0	\$0	\$0
Port Charlotte Middle QZAB	\$100,000	\$100,000	\$0	\$0	\$0	\$0
County wide Site Improvements (SWFWMD)	\$500,000	\$500,000	\$0	\$0	\$0	\$0
Safety and security retrofitting, Unspecified location	\$2,600,000	\$0	\$1,100,000	\$500,000	\$500,000	\$500,000
<b>Modernizations and Replacements Subtotal</b>	<b>\$ 26,842,222</b>	<b>\$ 14,786,254</b>	<b>\$ 6,750,000</b>	<b>\$ 2,305,968</b>	<b>\$ 500,000</b>	<b>\$ 2,500,000</b>

### Maintenance, Repair & Renovation

HVAC	\$5,677,966	\$1,149,966	\$1,200,000	\$1,175,000	\$1,050,000	\$1,103,000
Flooring	\$1,099,024	\$223,983	\$190,000	\$160,000	\$256,041	\$269,000
Roofing	\$6,873,555	\$1,434,555	\$1,650,000	\$1,175,000	\$1,275,000	\$1,339,000
Safety to Life	\$869,053	\$259,053	\$100,000	\$100,000	\$200,000	\$210,000
Fencing	\$0	\$0	\$0	\$0	\$0	\$0
Parking	\$0	\$0	\$0	\$0	\$0	\$0
Electrical	\$0	\$0	\$0	\$0	\$0	\$0
Fire alarm	\$1,978,218	\$457,218	\$300,000	\$350,000	\$425,000	\$446,000
Telephone/Intercom System	\$831,647	\$296,647	\$20,000	\$105,000	\$200,000	\$210,000
Closed circuit television	\$0	\$0	\$0	\$0	\$0	\$0
Paint	\$701,590	\$141,590	\$75,000	\$75,000	\$200,000	\$210,000
Miscellaneous fixed building equipment replacement	\$1,345,076	\$381,076	\$200,000	\$200,000	\$275,000	\$289,000
Surveys and engineers	\$47,066	\$13,066	\$0	\$11,000	\$11,000	\$12,000
Bleacher repair	\$151,000	\$50,000	\$25,000	\$25,000	\$25,000	\$26,000
Gym floors	\$163,368	\$58,368	\$24,000	\$24,000	\$28,000	\$29,000

ADA	\$568,640	\$162,640	\$75,000	\$75,000	\$125,000	\$131,000
Athletic Field Improvement	\$3,288,634	\$1,506,634	\$440,000	\$440,000	\$440,000	\$462,000
Custodial Equipment	\$188,385	\$36,385	\$35,000	\$35,000	\$40,000	\$42,000
Bathroom partitions	\$355,000	\$50,000	\$50,000	\$50,000	\$100,000	\$105,000
Small remodeling and renovation projects	\$951,731	\$372,731	\$105,000	\$105,000	\$180,000	\$189,000
Paving	\$329,217	\$126,217	\$50,000	\$50,000	\$50,000	\$53,000
Playgrounds, elementary	\$175,339	\$53,339	\$30,000	\$30,000	\$30,000	\$32,000
<b>Transportation and Maintenance Subtotal</b>	<b>\$25,594,509</b>	<b>\$6,773,468</b>	<b>\$4,569,000</b>	<b>\$4,185,000</b>	<b>\$4,910,041</b>	<b>\$5,157,000</b>

**State PECO Funds for Maintenance, Repair and Renovation**

PECO Funds Used for Maintenance, Repair and Renovation	\$4,704,734	\$1,066,800	\$1,023,529	\$914,426	\$852,744	\$847,235
<b>Debt Service Subtotal</b>	<b>\$ 4,704,734</b>	<b>\$ 1,066,800</b>	<b>\$ 1,023,529</b>	<b>\$ 914,426</b>	<b>\$ 852,744</b>	<b>\$ 847,235</b>

**Local 2 Mill Expenditure for Maintenance, Repair & Renovation**

Minor maintenance/ repair	\$17,724,132	\$3,036,644	\$3,280,087	\$3,599,271	\$3,881,743	\$3,926,387
Maintenance/repair salaries	\$0	\$0	\$0	\$0	\$0	\$0
School bus purchases	\$6,939,331	\$2,000,946	\$1,170,050	\$1,263,029	\$1,222,306	\$1,283,000
Other vehicle purchases	\$1,137,000	\$327,000	\$200,000	\$200,000	\$200,000	\$210,000
Capital outlay equipment	\$0	\$0	\$0	\$0	\$0	\$0
Rent/lease payments	\$0	\$0	\$0	\$0	\$0	\$0
COP debt service	\$0	\$0	\$0	\$0	\$0	\$0
Rent/lease relocatables	\$4,754,928	\$1,028,928	\$920,000	\$920,000	\$920,000	\$966,000
Environmental problems	\$0	\$0	\$0	\$0	\$0	\$0
S.1011.14 Debt service	\$0	\$0	\$0	\$0	\$0	\$0
Remodeling	\$0	\$0	\$0	\$0	\$0	\$0
1 cent- 1/2 cent sales surtax debt service	\$0	\$0	\$0	\$0	\$0	\$0
Special facilities account	\$0	\$0	\$0	\$0	\$0	\$0
396-facilities department staff	\$2,878,455	\$538,500	\$554,500	\$570,500	\$598,500	\$616,455
394-QZAB Bond payments	\$1,213,545	\$242,709	\$242,709	\$242,709	\$242,709	\$242,709

395-Interfund transfers	\$1,905,582	\$903,000	\$800,000	\$202,582	\$0	\$0
317-Furnishing new portable classrooms	\$288,139	\$188,139	\$25,000	\$25,000	\$25,000	\$25,000
368-Vocational equipment	\$1,613,995	\$1,202,995	\$100,000	\$100,000	\$103,000	\$108,000
369-Musical instruments	\$431,302	\$81,302	\$75,000	\$75,000	\$125,000	\$75,000
370-Maps and Globes	\$103,000	\$20,000	\$20,000	\$20,000	\$21,000	\$22,000
371- Middle school instructional equipment	\$115,021	\$40,021	\$18,000	\$18,000	\$19,000	\$20,000
372- Elementary other instructional equipment	\$206,195	\$42,195	\$40,000	\$40,000	\$41,000	\$43,000
375- High school other instructional equipment	\$189,000	\$37,000	\$37,000	\$37,000	\$38,000	\$40,000
378- Instructional furniture	\$653,456	\$242,456	\$100,000	\$100,000	\$103,000	\$108,000
380- Non instructional furniture and equipment	\$1,562,289	\$636,289	\$225,000	\$225,000	\$232,000	\$244,000
381- Closed circuit wiring upgrades	\$1,560,000	\$750,000	\$200,000	\$200,000	\$200,000	\$210,000
384- Audio/Visual equipment	\$967,179	\$562,179	\$100,000	\$100,000	\$100,000	\$105,000
386- Copiers	\$506,236	\$101,236	\$100,000	\$100,000	\$100,000	\$105,000
388- Extracurricular activity equipment	\$299,200	\$52,200	\$60,000	\$60,000	\$62,000	\$65,000
393-ESE instructional equipment	\$302,130	\$57,130	\$60,000	\$60,000	\$62,000	\$63,000
605- Additional furniture for hurricane replacement schools	\$1,476,602	\$1,476,602	\$0	\$0	\$0	\$0
700- District technology plan	\$24,248,352	\$4,388,352	\$4,608,000	\$4,838,000	\$5,080,000	\$5,334,000
<b>Other Items Subtotal</b>	<b>\$71,075,069.00</b>	<b>\$ 11,562,305</b>	<b>\$12,935,346.00</b>	<b>\$ 7,013,791</b>	<b>\$ 7,152,209</b>	<b>\$ 7,426,164</b>
<b>PROJECT TOTALS</b>	<b>\$396,222,926.00</b>	<b>\$92,160,061.00</b>	<b>\$48,242,544.00</b>	<b>\$38,703,665.00</b>	<b>\$22,771,818.00</b>	<b>\$25,768,625.00</b>

Source: Charlotte County School District, 2007-2008 Work Plan

## 10 and 20 Year Projects

The long-range planning for the School District includes the following projects and locations scheduled for major renovation, repair, and maintenance projects within the School District in years 6-10 beyond the project plans detailed in the five years covered by the CIP. The schedule of capital outlay projects projected to ensure the availability of satisfactory student stations for the projected student enrollment in K-12 programs for the future five years are displayed in the Tables below.

**Table 11.19: 10-Year Capacity Improvement Costs, 2011/12 – 2016/17**

<b>Project</b>	<b>Location, Community, Quadrant or other general location</b>	<b>2011-2012/ 2016-2017 Projected Cost</b>
Remodel, renovate, new construction, and site improvements	Charlotte Harbor Center	\$3,311,910
Remodel, renovate, new construction, and site improvements	Charlotte Technical Center	\$9,104,200
Remodel, renovate, new construction, and site improvements	Deep Creek Elementary	\$5,641,860
Remodel, renovate, new construction, and site improvements	L.A. Ainger Middle	\$13,895,588
Remodel, renovate, new construction, and site improvements	Liberty Elementary	\$1,755,180
Remodel, renovate, new construction, and site improvements	Meadow Park Elementary	\$33,020,316
Remodel, renovate, new construction, and site improvements	Murdock Middle Elementary	\$1,160,872
Remodel, renovate, new construction, and site improvements	Myakka River Elementary	\$1,985,449
Remodel, renovate, new construction, and site improvements	Port Charlotte High	\$12,250,000
Remodel, renovate, new construction, and site improvements	Vineland Elementary	\$7,624,924
New construction	New Elementary School "A"	\$33,105,576
New construction	New Middle School "A"	\$56,624,666
New construction	New High School "A"	\$103,377,750
	<b>Total</b>	<b>\$282,858,291</b>

Source: Charlotte County School District, 2007-2008 Work Plan

Additionally, the School District has a long-term plan (years 11-20) for estimated maintenance and capacity costs. The 20-year capacity improvement (Table 11.20) and maintenance and costs (Table 11.21) are shown below.

**Table 11.20: 20-Year Capacity Project Costs, 2016/17 – 2026/27**

<b>Project</b>	<b>Location, Community, Quadrant or other general location</b>	<b>2016-2017/ 2026-2027 Projected Cost</b>
New Construction	New Elementary School "B"	\$54,000,000
New Construction	New Middle School "B"	\$88,000,000
New Construction	New High School "B"	\$114,000,000
	<b>Total</b>	<b>\$256,000,000</b>

Source: Charlotte County School District, 2007-2008 Work Plan

**Table 11.21: 20-Year Maintenance Costs, 2016/17 – 2026/27**

<b>Project</b>	<b>2016-2017/2026-2027 Projected Costs</b>
HVAC	\$7,807,202
Flooring	\$1,511,157
Roofing	\$9,451,137
Safety to Life	\$1,194,947
Fire Alarm	\$27,120,048
Telephone Intercom	\$1,143,513
Paint	\$964,686
Misc fixed building equipment replacement	\$1,849,478
Survey and Engineers	\$64,715
Bleacher Repair	\$207,625
Gym Floors	\$2,234,630
ADA	\$781,880
Athletic Field Improvements	\$4,521,871
Custodial Equipment	\$259,028
Bathroom Partitions	\$488,125
Small Remodeling and Renovations Projects	\$1,308,630
Paving	\$452,672
Playgrounds, elementary	\$241,090
<b>Total</b>	<b>\$61,602,434</b>

Source: Charlotte County School District, 2007-2008 Work Plan

### **School District Revenue Sources**

The School District is responsible for funding the capital needs of public schools in the County. The School District utilizes a variety of State and local revenue sources to provide for their capital needs. Local funding sources may include millage (maximum 2-mil local property tax), school impact fees, and certificates of participation (COPs) which do not require voter approval, short term loans, voter-approved General Obligation Bonds, and sales tax revenue.

In addition to the local funding sources, the School District seeks the maximum available state funding provided through Public Education and Capital Outlay (PECO) funds and other state revenue sources such as Capital Outlay and Debt Service (CO & DS) and Class Size Reduction (CSR) appropriations. State capital outlay funding sources are derived from motor vehicle license tax revenue (CO & DS), and gross receipts tax revenue from utilities (PECO). However, State funds represent less than 10 percent of the School District's capital needs.

The recent mandate for smaller class sizes has resulted in the availability of additional state funding. Plans that help reduce the need for additional permanent student stations such as acceptable school capacity levels, redistricting, busing, year-round schools, charter schools, magnet schools, public-private partnerships, multi-track scheduling, grade level organization, block scheduling, or other alternatives.

The School District has the legal authority to utilize up to 1.5 mils of the 2.0 capital tax to fund the debt service or COPs issues. In general, funding available from State and local sources, including the issuance of long-term debt and the continuation of school impact fees, will be evaluated annually to determine the financial feasibility of the capital plan in order to meet the long-term concurrency management plan of the School District.

Table 11-22 is a comprehensive view of estimated revenue sources and estimated annual revenue for the next five to ten years.

**Table 11.22: Total Revenues for Charlotte County Schools, 2007/08 – 2011/12**  
Summary of Estimated Revenue

Revenue Source	FY 2008-2012	FY 2007	FY 2008	FY 2009	FY2010	FY 2011
<b>2 Mill Revenue Source</b>						
Special Millage (2 - Mills)	\$237,665,476	\$49,992,249	\$44,741,200	\$45,636,024	\$47,461,465	\$49,834,538
<b>Local Sources Subtotal</b>	<b>\$237,665,476</b>	<b>\$49,992,249</b>	<b>\$44,741,200</b>	<b>\$45,636,024</b>	<b>\$47,461,465</b>	<b>\$49,834,538</b>
<b>PECO and CO &amp; DS Sources</b>						
CO & DS Cash Flow-Through Distributed	\$554,740	\$110,948	\$110,948	\$110,948	\$110,948	\$110,948
CO & DS Interest on Undistributed CO	\$84,460	\$16,892	\$16,892	\$16,892	\$16,892	\$16,892
PECO Bonds (Construction)	\$2,652,001	\$1,431,612	\$380,942	\$207,675	\$305,269	\$326,503
PECO Bonds (Maintenance)	\$4,704,834	\$1,066,800	\$1,023,529	\$914,526	\$852,744	\$847,235
<b>State Sources Subtotal</b>	<b>\$7,996,035</b>	<b>\$2,626,252</b>	<b>\$1,532,311</b>	<b>\$1,250,041</b>	<b>\$1,285,853</b>	<b>\$1,301,578</b>
<b>COPs / Bond Sources</b>						
	\$0	\$0				
<b>COPs / Bond Sources Subtotal</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Additional Revenue Sources</b>						
Classrooms for Kids	\$2,910,824	\$2,910,824	\$0	\$0	\$0	\$0
Impact Fees	\$9,700,000	\$0	\$2,000,000	\$2,200,000	\$2,500,000	\$3,000,000
Interest including profit on investment	\$6,520,000	\$1,320,000	\$1,300,000	\$1,300,000	\$1,300,000	\$1,300,000
Fund balance carried forward	\$93,709,434	\$93,709,434	\$0	\$0	\$0	\$0
Interfund transfer	\$1,905,582	\$903,000	\$800,000	\$202,582	\$0	\$0

Transfer from general fund	\$2,270,418	\$0	\$0	\$597,418	\$824,000	\$849,000
Transfer from special revenue fund	\$485,479	\$485,479	\$0	\$0	\$0	\$0
Insurance/FEMA proceeds	\$68,500,000	\$22,500,000	\$40,000,000	\$6,000,000	\$0	\$0
<b>Other Sources Subtotal</b>	<b>\$186,001,737</b>	<b>\$121,828,737</b>	<b>\$44,100,000</b>	<b>\$10,300,000</b>	<b>\$4,624,000</b>	<b>\$5,149,000</b>

<b>REVENUE TOTALS</b>	<b>\$431,663,248</b>	<b>\$174,447,238</b>	<b>\$90,373,511</b>	<b>\$57,186,065</b>	<b>\$53,371,318</b>	<b>\$56,285,116</b>
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Source: Charlotte County School District, 2007-2008 Work Plan

Table 11.23 is a general summary of the School District’s planned capital expenditures and revenues for new construction and remodeling projects only over the five year period from 2007/08-2011/12. The total revenues and expenditures over the five year planning period total over \$300 million. The School District’s Five-Year Capital Improvement Plan demonstrates financial feasibility, as the total costs do not exceed the total revenues in each year, as well as over the five year planning period.

**Table 11.23: Summary of Revenue/Expenditures Available for New Construction and Remodeling Projects Only**

	<b>2007-2008</b>	<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>Five-Year Total</b>
<b>Total Revenues</b>	174,447,238	90,373,511	57,186,065	53,371,318	56,285,116	431,663,248
<b>Total Project Costs</b>	92,160,061	48,242,544	38,703,665	22,771,818	25,768,625	396,222,926
<b>Difference (Remaining Funds)</b>	82,287,177	42,130,967	18,482,400	30,599,500	30,516,491	35,440,322

Source: Charlotte County School District, 2007-2008 Work Plan

In addition to the funded improvements which are necessary achieve and maintain the adopted level of service standard for schools, the School District has a list of capital improvement projects which do not currently have a funding source. These projects and their anticipated costs have been provided in Table 11.24. As new capacity is needed to achieve and maintain the adopted level of service, these projects will be placed within the School District’s financially feasible 5-Year Capital Facilities Work Program.

**Table 11.24: Unfunded Capital Improvements**  
Summary of 5-Year District Facilities Unfunded Capital Improvements

Unfunded Projects	FY 2007 -2012	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011
<b>Capacity Project Schedule</b>						
Charlotte Harbor School (Remodel, renovate, new construction)	\$3,311,910	\$0	\$0	\$0	\$0	\$3,311,910
Charlotte Technical Center (Remodel, renovate, new construction, site work)	\$9,104,200	\$0	\$0	\$0	\$0	\$9,104,200
Deep Creek Elementary (Remodel, renovate, new construction and site improvements)	\$5,641,860	\$0	\$0	\$0	\$0	\$5,641,860
L.A. Ainger Middle (Remodel, renovate, new construction and site improvements)	\$13,895,588	\$0	\$0	\$0	\$0	\$13,895,588
Liberty Elementary (Remodel, renovate, new construction, and site improvements)	\$1,755,180	\$0	\$0	\$0	\$0	\$1,755,180
Meadow Park Elementary (Replacement School)	\$33,020,316	\$0	\$0	\$0	\$0	\$33,020,316
Murdock Middle (Remodel, renovate, new construction, and site improvements)	\$1,160,872	\$0	\$0	\$0	\$0	\$1,160,872
Myakka River Elementary (Remodel, renovate, new construction, and site improvements)	\$1,965,449	\$0	\$0	\$0	\$0	\$1,965,449
Port Charlotte Senior High (Remodel, renovate, new construction and site improvements)	\$12,250,000	\$0	\$0	\$0	\$0	\$12,250,000
Port Charlotte Middle (Remodel, renovate, new construction and site improvements)	\$10,700,382	\$0	\$0	\$0	\$0	\$10,700,382
Vineland Elementary (Remodel, renovate, new construction, and site improvements)	\$7,644,924	\$0	\$0	\$0	\$0	\$7,644,924
New Elementary School "A" (Location not specified)	\$33,105,576	\$0	\$0	\$0	\$0	\$33,105,576
New Middle School "A" (Location not	\$56,624,666	\$0	\$0	\$0	\$0	\$56,624,666

specified)						
New High School "A" (Location not specified)	\$103,377,750	\$0	\$0	\$0	\$0	\$103,377,750
<b>New Construction Subtotal</b>	<b>\$293,558,673</b>	<b>\$-</b>	<b>\$-</b>	<b>\$-</b>	<b>\$-</b>	<b>\$30,396,828</b>

**Other Project Schedules**

Land Acquisitions, Unspecified Location	\$10,000,000	\$2,000,000	\$2,000,000	\$2,000,000	\$2,000,000	\$2,000,000
Site improvements (county-wide) (SWFWMD)	\$14,000,000	\$2,000,000	\$4,000,000	\$4,000,000	\$2,000,000	\$2,000,000
Technology retrofit, Unspecified Location	\$6,000,000	\$0	\$0	\$0	\$0	\$6,000,000
Murdock Center (Remodel, renovate, new construction The Academy)	\$16,800,000	\$0	\$0	\$0	\$0	\$16,800,000
West County Transportation and Maintenance (Remodel, renovate, new construction)	\$5,590	\$0	\$0	\$0	\$0	\$5,590
Murdock Transportation (New construction)	\$5,250,000	\$0	\$0	\$0	\$0	\$5,250,000
Student support center, Unspecified Location	\$22,750,000	\$0	\$0	\$0	\$0	\$22,750,000
<b>Modernizations and Replacements Subtotal</b>	<b>\$74,805,590</b>	<b>\$4,000,000</b>	<b>\$6,000,000</b>	<b>\$6,000,000</b>	<b>\$4,000,000</b>	<b>\$54,805,590</b>

<b>PROJECT TOTALS</b>	<b>\$368,364,263.00</b>	<b>\$4,000,000.00</b>	<b>\$6,000,000.00</b>	<b>\$6,000,000.00</b>	<b>\$4,000,000.00</b>	<b>\$85,202,418.00</b>
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Source: Charlotte County School District, 2007-2008 Work Plan

## **Supporting Infrastructure Needs and School Planning Shared Costs**

By coordinating the planning of future schools with affected local governments, the School District can better identify the costs associated with site selection and the construction of new schools. Coordinated planning requires the School District to coordinate school planning with the representatives from various government agencies. The affected jurisdiction may coordinate with School District staff to perform its own technical review of a site. This analysis permits the School District and affected local governments to jointly determine the need for, and timing of, on-site and off-site improvements necessary to support each new school.

With this process, shared funding for capital improvements for school sites can be determined according to the responsibility of each party for each specific school site. Necessary infrastructure coordination may include: potable water lines, sanitary sewer lines, drainage systems, roadway improvements including turn lanes, traffic signalization and signage, site lighting, bus stops, and sidewalks. The ILA addresses the timing and responsibility for construction, as well as the operation and maintenance of required on-site and off-site improvements.

Other cost-effective measures should be considered by local governments during the process of formulating neighborhood plans and programs and reviewing large residential projects. During those processes local governments can encourage developers or property owners to provide the School District with incentives to build schools in their neighborhoods. These incentives may include, but are not limited to, donation and preparation of a site(s), acceptance of stormwater run-off from future school facilities into development project stormwater management systems, reservation or sale of school sites at pre-development prices, construction of new school facilities or renovation of existing school facilities, and provision of transportation alternatives.

## **School District Capital Improvements Summary**

Florida law requires that the Public School Facilities Element (PSFE) of a local government comprehensive plan address how the adopted level of service (LOS) standards will be achieved and maintained. The ability to achieve and maintain the adopted LOS must be based on a School District's annually updated financially feasible "5-Year District Facilities Work Program." The School District continuously reviews its capital needs on a long-term basis. Capacity is added in accordance with the annually adopted financially feasible 5-year District Facilities Work Program (short-term), and for the long-term planning period (10 and 20 years).

Florida law requires that the public school LOS standards be adopted into each respective local government's CIE, and must apply to all schools of the same type (elementary, middle, and high) and must be maintained within each CSA. Charlotte County's 5-year District Facilities Work Program, as developed for the CSA as proposed, will fully achieve and maintain the adopted LOS in each CSA during the 5-year planning period.

## IV. GOALS, OBJECTIVES AND POLICIES

**Goal 1:** Establish and maintain with the School District a public school system which offers a high quality educational environment, provides accessibility for all of its students, and ensures adequate school capacity to accommodate enrollment demand. [9J-5.025(3)(a)]

**Objective 1.1:** Provide adequate school facilities in Charlotte County Schools by adopting a concurrency management system which can achieve and maintain the adopted level of service for the short and long term planning periods. [9J.-5.025(3)(b)(1)]

**Policy 1.1.1:** The County hereby adopts the following Level of Service standards for existing and new schools: [9J-5.025 (3)(c)(7)]

Type of School Concurrency Service Area	Level of Service Standard
Elementary	95% of Permanent FISH Capacity
Middle	100% of Permanent FISH Capacity
High	100% of Permanent FISH Capacity

Source: Updated Interlocal Agreement for Coordinated Planning and School Concurrency.

**Policy 1.1.2:** The County hereby adopts less than district-wide Concurrency Service Areas (CSA's) through the merger elementary school boundaries, and the use of individual attendance boundaries to establish middle school and high school CSAs in which to measure the level of service standard. [9J-5.025(3)(c)(1)]

**Policy 1.1.3:** The County, in collaboration with the City and the School District shall utilize the following procedures for modifying CSAs: [9J-5.025(3)(c)(1)]

- a. When considering a CSA modification, the School District must verify that:
- b. The adopted level of service standard will be achieved and maintained during the five-year planning period; and
- c. The utilization of school capacity will be maximized to the greatest extent possible, taking into account transportation costs and other relevant factors.
- d. The School Board, in coordination with Local Governments shall review the proposed CSA boundaries and the data and analysis used to support the changes, and determine whether or not a change is appropriate considering the standards outlined in 1.1.3.a above.
- e. If the proposed changes to the CSA boundaries are acceptable, the School Board shall transmit the changes with the supporting data and analysis to the Local Governments for review and comment. Comments from the Local Governments must be provided within forty-five (45) days of receipt.
- f. The change to a CSA boundary shall become effective upon final approval of the new CSA boundary map by the School Board. New CSA boundary maps shall also be included as data and analysis in support of the Public School Facilities Element.

**Objective 1.2:** The County shall require a school concurrency review be performed by the School District to ensure that adequate school facility capacity within the Public School Concurrency Service Area (SCSA) is available to accommodate the projected residential development in accordance with the adopted level of service standard for schools. [9J-5.025(3)(b)(2)]

**Policy 1.2.1:** The County shall not approve any non-exempt residential development application for preliminary plat, site plan or functional equivalent until the School District has verified that available capacity exists to serve the development.

**Policy 1.2.2:** The County shall consider the following residential uses exempt from the requirements of school concurrency:

- a. Single family lots of record, existing at the time the school concurrency implementing ordinance becomes effective. This includes residential development that has a site plan, subdivision plan, preliminary or final plat approval or the functional equivalent for a site specific development order prior to the commencement date of the School Concurrency Program.
- b. Age restricted communities with no permanent residents under the age of 18. Exemption of an age restricted community will be subject to a restrictive covenant limiting the age of permanent residents to 18 years and older.
- c. All new residential plats and site plans (or functional equivalent), or amendments to previously approved residential development, which are calculated to generate less than one student. Such development shall be subject to payment of any school impact fees that are in effect.

**Policy 1.2.3:** The County, through its land development regulations, shall establish a school concurrency review process for all residential projects that are not exempt under Policy 1.2.2. The minimum process requirements are described below:

- a. A residential development application is submitted to the local government, which includes a School Impact Analysis (SIA). The local government determines application is sufficient for processing and transmits the SIA to the School District for review.
- b. The School District reviews the application for available capacity and issues a School Capacity Availability Determination Letter (SCADL) to the local government.
- c. If capacity is available within the CSA (or an adjacent CSA), the School District shall issue a SCADL verifying available capacity.
- d. If capacity is not available within in the CSA (or an adjacent CSA), the School District shall issue a SCADL indicating the development is not in compliance with the adopted LOS and may offer the developer a negotiation period to present mitigation options.
- e. The County shall not issue approval of any site plan, subdivision plan, preliminary or final plat approval or functional equivalent for a residential development until receiving confirmation of available school capacity in the form of a SCADL from the School District.

**Policy 1.2.4:** If adequate school capacity is not available to support a proposed residential development, the County, in conjunction with the School District, shall review

proportionate share mitigation options which will add the school capacity necessary to satisfy the impacts of the proposed development. Acceptable forms of mitigation shall include, but are not limited to: [9J-5.025 (3)(c)(9)]

- a. Contribution of land or payment for land acquisition in conjunction with the provision of additional school capacity; or
- b. Mitigation banking based on the construction of a public school facility in exchange for the right to sell capacity credits; or
- c. Provision of additional student stations through the donation of buildings for use as a primary or alternative learning facility; or
- d. Provision of additional student stations through the renovation of existing buildings for use as learning facilities; or
- e. Construction or expansion of permanent student stations or core capacity; or
- f. Construction of a public school facility in advance of the time set forth in the School District's 5-Year Work Program.
- g. If mitigation is approved, the County and the School Board shall enter into a legally binding commitment with the residential developer, and the School District shall issue a SCADL verifying available capacity. If mitigation is denied, the County shall deny the application based on a deficiency in available school capacity to support the residential development.

**Policy 1.2.5:** The County shall, upon acceptance of a mitigation option identified in Policy 1.2.4, enter into a legally binding commitment with the School District and the residential developer. Mitigation funds provided must be directed by the School Board toward a school capacity improvement identified in a financially feasible 5-Year District Facilities Work Program and must satisfy the demands created by the development. [9J-5.025 (3)(c)(9)]

**Policy 1.2.6:** The County shall be responsible for notifying the School District when a residential development has received approval of a site plan, subdivision plan, preliminary or final plat approval or functional equivalent, when the development order for the residential development expires or is revoked, and when school impact fees have been paid.

**Policy 1.2.7:** No later than March 1, 2009, the County shall adopt school concurrency provisions into its Land Development Regulations (LDR).

**Objective 1.3:** Beginning with an effective date in 2008, all new public schools built within the County will be coordinated to be consistent with the County's Future Land Use Map designation, will be co-located with other appropriate public facilities when possible, and will have the on-site and off-site infrastructure necessary to support the new school. [9J-5.025(3)(b)(4), 9J-5.025(3)(b)(5), 9J-5.025(3)(b)(6)]

**Policy 1.3.1:** The County, in conjunction with the School District, shall jointly ensure the compatibility and integration between public schools and surrounding land uses, including a determination of the need for and timing of on-site and off-site improvements necessary to support a new school. [9J-5.025 (3)(c)(5), 9J-5.025 (3)(c)(10)]

**Policy 1.3.2:** The County and School Board agree that the primary responsibility for constructing, operating and maintaining required infrastructure improvements necessary to support new schools shall be divided as follows: [9J-5.025 (3)(c)(5)]

a. The School Board is responsible for:

1. On-site infrastructure improvements necessary to support the school,
2. On-site right-of-way dedications necessary to accommodate off-site infrastructure (turn lanes, sidewalks, etc.) adjacent to the school property, and
3. Extension of water and sewer lines required to serve the educational or ancillary facility. This provision is not intended to require the School Board to dedicate property or pay for improvements or construction of facilities of a general district-wide or regional nature which exceeds the School Board's proportionate share of the cost. By virtue of this subsection, the School Board is not waiving any local governmental responsibility for reimbursement per Chapter 1013, F.S.

b. The Local Government is responsible for:

1. Acceleration/deceleration/by-pass lanes on roads contiguous to the school site,
2. School cross-walk pavement striping,
3. School zone flashing lights,
4. Traffic signals that are required on public roads,
5. Sidewalks needed within the two-mile walk zone of a school,
6. Reduced speed limit zones and signage, and
7. Fire hydrant main extension.

**Policy 1.3.3:** The County shall encourage the location of schools near residential areas by: [9J-5.025 (3)(c)(4), 9J-5.025 (3)(c)(5), 9J-5.025 (3)(c)(10)]

a. Reviewing and providing comments on all new school sites,

b. Working with the School District to ensure compatibility of school sites with surrounding land uses, and

c. Assisting the School District in the identification of funding and/or construction opportunities (including developer participation or capital budget expenditures) for sidewalks, traffic signalization, access, water, sewer, drainage and other infrastructure improvements.

**Policy 1.3.4:** The County, in conjunction with the School District, shall seek opportunities to co-locate public facilities with schools, such as parks, libraries, and community centers, as the need for these facilities is identified. [9J-5.025 (3)(c)(4)]

**Policy 1.3.5:** The County, in conjunction with the School District and the City, shall identify issues relating to public school emergency preparedness, such as: [9J-5.025 (3)(c)(9)]

a. The determination of evacuation zones, evacuation routes, and shelter locations,

b. The design and use of public schools as emergency shelters, and

c. The designation of sites other than public schools as long-term shelters, to allow schools to resume normal operations following emergency events.

**Policy 1.3.6:** The County, the School District and the City shall utilize the Staff Working Group (SWG) to monitor the Updated Interlocal Agreement for Coordinated Planning and School Concurrency (ILA), which includes provisions for school concurrency in Charlotte County. [9J-5.025 (3)(c)(3)]

**Objective 1.4.:** Beginning with an effective date in 2008, the County shall adopt the School District's annually updated 5-Year District Facilities Work Program, as adopted by the School Board, which identifies financially feasible school facility capacity projects necessary to address existing deficiencies and meet future needs based upon achieving and maintaining the adopted level of service standard for schools into its Capital Improvements Element (CIE). [9J-5.025(3)(b)(1), 9J-5.025(3)(b)(3)]

**Policy 1.4.1.:** The County shall, no later than December 1st of each year, adopt the School District's annually updated 5-Year District Facilities Work Program, as adopted by the School Board, into the Capital Improvements Element. [9J-5.025 (3)(c)(2)]

**Policy 1.4.2:** The County, in conjunction with the School District, shall annually review the Public School Facilities Element and maintain a long-range public school facilities map series, including the planned general location of schools and ancillary facilities for the five-year planning period and the long-range planning period. The map series shall include at a minimum maps showing: [9J-5.025 (3)(c)(3)]

- a. Existing public school facilities by type and location of ancillary plants, [9J-5.025 (4)(a)]
- b. Public school facilities and ancillary plants generally planned for the five-year and long-range planning periods. [9J-5.025 (4)(b)]

**Policy 1.4.3:** The County, in conjunction with the School District, shall coordinate the long-range public school facilities map with the County's comprehensive plan and its future land use map. [9J-5.025 (3)(c)(6)]