



**MEETING OF THE  
CITIZENS OVERSIGHT COMMITTEE (COC)**

Peter Robinson, School Board Appointee  
Dennis Ryan, City of Vero Beach  
Robert Bralshaw, Town of Indian River Shores

Mary Wolff, City of Sebastian  
Yolanda Gamez, City of Fellsmere

**Charles Searey, Chairman**

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The COC will meet at **10:00 a.m.** ON **Friday, April 9, 2010**, in **Conference Room "B1-501"** on the 1st Floor of Building "B" of the County Administration Complex, 1800 27<sup>th</sup> Street, Vero Beach.

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**AGENDA**

1. Welcome and Introductions
2. Election of Chairman and Vice Chairman
3. Approval of the April 3, 2009 Meeting Minutes
4. Review of Public School Planning Activities 2009/2010
5. Draft Annual School Concurrence Assessment Report
6. Other matters
7. Announcement of next meeting April 2011
8. Adjournment

## **INDIAN RIVER COUNTY PUBLIC SCHOOL PLANNING CITIZEN OVERSIGHT COMMITTEE**

There was a meeting of the Indian River County (IRC) Public School Planning Citizen Oversight Committee on Friday, April 3, 2009 at 10:00 a.m. in the First Floor Conference Room "B1-501" in Building B of the County Administration Building, 1800 27<sup>th</sup> Street, Vero Beach, Florida.

Present were members: **Chairman Charles Searcy**, IRC Appointee; **Peter Robinson**, IRC School Board Appointee; **Mary Wolff**, City of Sebastian Appointee; **Robert Bradshaw**, Town of Indian River Shores Appointee; **Dennis Ryan**, City of Vero Beach Appointee and **Yolanda Gamez** (arrived at 10:12 a.m.), City of Fellsmere Appointee.

Also present were IRC staff: Robert Keating, Community Development Director; Stan Boling, Planning Director; Dr. Dan McIntyre, Assistant Superintendent Planning & Operations, Susan Olson, Director of Facility Planning & Construction; Deanna Newman and Susan Thigpen, Indian River County School Board; and Darcy Vasilas, Commissioner Assistant, District 3. Others present: Ryan Morrell, CivaTerra; and Leonard Kaczynski, Interested Citizen.

### **Call to Order**

Chairman Searcy called the meeting to order at 10:03 a.m. and turned the meeting over to Mr. Stan Boling, IRC Planning Director, for the election of Chairman for 2009.

### **Election of Chairman and Vice Chairman**

Mr. Stan Boling, IRC Planning Director, asked for nominations for Chairman.

**ON NOMINATION BY Mr. Robinson, SECONDED BY  
Mr. Ryan, the Committee voted unanimously (4-0) to  
re-elect Charles Searcy as Chairman of the Public  
School Planning Citizen Oversight Committee for  
2009.**

Chairman Searcy requested nominations for Vice Chairman.

**ON NOMINATION BY Mr. Robinson, SECONDED BY Mr. Ryan, the Committee voted unanimously (4-0) to elect Mary Wolff as Vice Chairman of the Public School Planning Citizen Oversight Committee for 2009.**

### **Approval of Minutes of the July 31, 2008 Meeting**

**ON MOTION BY Mr. Bradshaw, SECONDED BY Mr. Robinson, the members voted unanimously (4-0) to approve the July 31, 2008 minutes as submitted.**

### **Review of Public School Planning Activities During the 2008/2009 Period**

Mr. Boling highlighted the items contained in his memorandum dated March 23, 2009, a copy of which is on file in the Commission Office, of the County staff activities during the 2008/2009 period as follows:

1. **August 2008** – Staff Working Group reviewed implementation of school concurrency process, and discussed school attendance zone changes for Pelican Island and Sebastian elementary schools.
2. **October 2008** – Elected Officials Oversight Committee reviewed various school planning/concurrency updates and the latest 5 Year School Facilities Plan.
3. **November 2008** – School Planning Technical Advisory Committee reviewed and approved final site plan for Middle School BB complex (57<sup>th</sup> Street and 64<sup>th</sup> Avenue).
4. **November/December 2008** – Staff coordinated and prepared County – School Board Developers Agreement for off-site improvements serving Middle School BB. Agreement approved by School Board and Board of County Commissioners.
5. **December 2008** – Staff met with school district staff to review school capacity determination letters (SCADLs) and necessary adjustments to output data used in those letters.

6. **January/February 2009** – Staff provided school district staff with population projections by traffic analysis zone (TAZs), which are neighborhood-sized sub-geographic areas within the county. There are 154 TAZs within the county.
7. **February 2009** – Staff reviewed and provided comments on school district site plan for modifying the Wabasso School.
8. **February 2009** – Staff Working Group (meeting #1) reviewed population and student enrollment projections, and draft 5 Year Facilities Plan. Approved outline for first annual concurrency assessment report, and discussed school bus stops in new developments.
9. **March 2009** – Staff Working Group (meeting #2) reviewed and recommended changes to the draft school concurrency assessment report. Discussed maintaining Level of Service under draft 5 Year Facilities Plan.
10. **March 2009** – Staff reviewed and commented on school district site plan modifying Glendale Elementary.

Ms. Gamez arrived at 10:12 a.m. and Mr. Searcy introduced her as the new Fellsmere appointee. He also recognized Mr. Bradshaw as the Town of Indian River Shores appointee to the COC.

### **Draft Annual School Concurrency Assessment Report**

Mr. Boling reviewed Attachment 1, the Timeline of Yearly School Planning Activities, noting the main purpose of this Timeline was the School Facilities Plan and the School Concurrency Assessment Report was worked on by staff in January, February and March getting drafts prepared then it goes to the COC for input. He continued as the year progressed, the Facilities Plan was fine tuned and the School Board would vote on it in September.

Mr. Boling reviewed the challenges and issues with recommended actions staff developed as:

- Due to market and overall economic conditions, the number of residential projects subject to school concurrency review was minimal. As a result, only a few school concurrency evaluations were made under the new system. After the first few reviews, staff met and made adjustments to some of the procedures and informational items provided in the determination letters (SCADLs)

produced by the school district. After these adjustments were made, staff was satisfied with the effectiveness of the process.

- It appeared some municipalities were not consistently providing residential building permit and certificate of occupancy (C.O.) information to district staff. To correct this deficiency, each municipality needed to provide the district with residential permit and C.O. information in a spreadsheet format acceptable to district staff. Those data needed to be provided each month, even if zero or little residential activity had occurred for the given month.

Mr. Boling announced there were some changes to school attendance zones approved by the school board mainly affecting Treasure Coast Elementary, Pelican Island Elementary, and Sebastian Elementary to balance out capacity.

Mr. Searcy inquired how the magnet schools affected concurrency. Mr. Boling replied magnet schools did not have the geographical service area and they were not reflected in the demand in terms of the students or the capacity. They were transparent to the school concurrency process.

Mrs. Wolff asked about charter schools. Mrs. Olson replied according to state legislature, charter schools were contemplated to be subject to concurrency. She added the challenge to the school board was they could not place children in the charter schools to decrease the load in the public schools.

Discussion entailed regarding the current enrollment at the magnet schools.

### **Draft 5 Year School Facilities Plan**

Mrs. Olson referred the members to the Draft 5 Year School Facilities Plan in the agenda packet, a copy is also on file in the Commission Office. She explained the legislature was threatening to take a quarter of a million from their capital budget to move to the operating side. She continued at one point the legislature had talked about taking a half million which would mean no operating capital for next year. Until those decisions were made, the major projects were on hold for the things put in last years' plan.

Mrs. Olson reviewed the projects that would be done:

- Vero Beach Elementary campus would be replaced. Other buildings (the School Board Warehouse and Operations, the Purchasing Department and

Building Department) that are between Vero Beach High School and Vero Beach Elementary would have to be removed first because when Vero Beach Elementary was rebuilt, on-site retention would have to be added to the site.

The Warehouse, Operations, Purchasing and Building Departments would be relocated to 66<sup>th</sup> Avenue property.

- Other things would be general maintenance of buildings and equipment. Some of the older buses would be replaced and status quo would remain until the economy improves.
- Pelican Island Elementary would be taking some students from Treasure Coast Elementary to ease crowding.
- Approximately \$11 million would be given to the charter schools.

Mrs. Wolff asked if the buildings utilized by the charter schools would go to the School Board if the schools failed. Mrs. Olson replied they most likely would not because most of them were located on property owned by other entities or the buildings were not built to the same standards required for public schools.

A lengthy discussion ensued regarding the differences between the requirements for public and charter schools.

Mrs. Gamez asked about the impact of budget cuts on Fellsmere schools. Mrs. Olson replied the cuts would affect all schools, including Fellsmere. Dr. MacIntyre interjected some of the stimulus package was for Title 1 schools, of which Fellsmere would be eligible.

Mrs. Wolff queried if the School Board could refinance their facilities at lower interest rates to free up some more money. Mrs. Olson opined that was always a possibility but the current interest rate was similar to what was currently out there and in some cases recently there have been few banks willing to lend the amount of money needed.

Ms. Deanna Newman gave a PowerPoint presentation, a copy of which is on file in the Commission Office and a copy will be sent to all members.

### **Other Matters**

Dr. MacIntyre announced this would be his last COC meeting, noting he was retiring in June, 2009. He thanked staff for their cooperativeness and stated he had enjoyed their working relationship.

Mrs. Wolff inquired if the meetings could be held in the afternoon rather than in the morning to accommodate her work schedule.

### **Announcement of Next Meeting**

The next meeting will be held in April, 2010.

### **Adjournment**

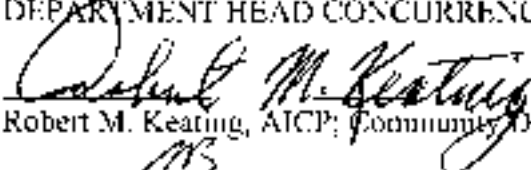
The meeting adjourned at 11:20 a.m.

**INDIAN RIVER COUNTY, FLORIDA  
M E M O R A N D U M**

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**TO:** The Honorable Members of the Public School Planning Citizens Oversight Committee

DEPARTMENT HEAD CONCURRENCE.

  
Robert M. Keating, AICP; Community Development Director

**FROM:** Stan Beling, AICP; Planning Director

**DATE:** March 31, 2010

**SUBJECT: Public School Planning Activities During the 2009/2010 Period**

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**This information is provided to the Public School Planning Citizens Oversight Committee for its regular meeting of April 9, 2010.**

Since the last Citizens Oversight Committee meeting was held (April 3, 2009), County staff has continued to coordinate and be involved in many public school planning activities. During the 2009/2010 period, school planning activities included the following:

1. (July 2009) BCC approves amended developers agreement with school board providing for off site improvements to serve the Storm Grove Middle School. The approved amendment reflects the reduced cost of providing a 3-lane bridge and southbound left turn lane at 66<sup>th</sup> Avenue/Lateral A Canal and 57<sup>th</sup> Street. The costs were reduced from \$2,500,000 to \$1,576,341.52 and are being shared 50/50 between the county and school board.
2. (July 2009) School Planning Technical Advisory Committee reviews and approves selection of the "Ansin 20 Acre" elementary school site located in the City of Fellsmere adjacent to Vero Lake Estates at the southwest corner of 89<sup>th</sup> Street and 106<sup>th</sup> Avenue
3. (July 2009) School Planning Technical Advisory Committee reviews and approves major site addition and renovation to the Citrus Elementary School campus at 2771 4<sup>th</sup> Street.
4. (September 2009) School board approves updated 5 year School Facilities Plan for the 2010-2014 planning period.
5. (November 2009) County Board of County Commissioners adopts Capital Improvement Element annual update which includes the school district's 5 year School Facilities Plan for 2010-2014.
6. (January/February) Staff provides school district staff with population projections by traffic analysis zone (TAZs), which are neighborhood-sized sub-geographic areas within the county. There are 154 TAZs within the county.



7. (February 2010) County staff and school district staff coordinate and draft annual school concurrency assessment report for the 2009/2010 period for review by the Public School Planning Staff Working Group (PSPSWG).
8. (February 2010) PSPSWG [meeting #1] discusses population and student enrollment projections, planned school facility improvements, and draft 5 Year Facilities Plan (see attachment #1).
9. (March 2010) PSPSWG [meeting #2] reviews and recommends changes to the draft school concurrency assessment report. Discusses maintaining LOS under draft 5 Year Facilities Plan. Approves recommendation that the School District and City of Fellsmere continue to work together to meet the adopted level of service standard for the Fellsmere Elementary School service area (see attachment #2).
10. (March 2010) Carter Associates, on behalf of school district, submits revised site plan for bus loop and drainage improvements to the Glendale Elementary School campus. Currently under review for staff-level approval.

Attachments:

1. Approved minutes from February 2010 PSPSWG
2. Unapproved minutes from March 2010 PSPSWG
3. Timeline of Yearly School Planning Activities



**PUBLIC SCHOOL PLANNING STAFF WORKING GROUP (PSPSWG)  
MEETING MINUTES**

**Friday - February 5, 2010 - 10:00 a.m.**

Conference Room A1-411, County Administration Building "A", 1801 27<sup>th</sup> Street, Vero Beach, FL

Note: Audio of the meeting can be found at <http://www.ivero.com/boards/93760/index.htm>

Also, all reports referenced are on file at the Board of County Commissioners and are available upon request.

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**MEMBERS PRESENT**

Robert M. Keating	Indian River County (IRC)
Stan Boling	IRC
Jason Nunemaker	City of Fellsmere (COF)
Susan Olson	Indian River County School Board (IRCSB)
Don Bosworth	City of Sebastian (COS)
Timothy McGarry	City of Vero Beach (COVB)
Robert Bradshaw	Town of Indian River Shores (TIRS)
Carol Johnson	IRCSB

**OTHER**

Beth Casano	Recording Secretary
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Mr. Boling called the meeting to order at 10:05 a.m.

**1. APPROVAL OF MINUTES**

**On Motion** by Mr. Nunemaker and **Seconded** by Mr. Bradshaw, the group unanimously approved the minutes from the March 10, 2009 meeting.

Mr. Boling explained that getting input on development, enrollment, capital projects and any other issues was the usual process for the first meeting. Afterwards, IRC Staff will put together a draft report and e-mail to all members before the March 26<sup>th</sup> meeting.

**2. REVIEW OF LAST YEAR'S REPORT AND CURRENT PRELIMINARY DATA**

Mr. Boling highlighted some of last year's report: the agreement on the format of the report; the effect on elementary school enrollment of little or no new housing development in the next three years; demographer's prediction of slight increase by 2011/2013 due to an increase in births in 2004/2006; high schools looking at a smaller class size moving through; and the only negative numbers for available capacity had been Citrus and Fellsmere Elementary Schools. Mr. Boling pointed out the last page of the report which showed that with the addition of Storm Grove Middle School, overall, Indian River County schools should, by 2013, be 80-90% utilization.

Mr. Boling commented that he would be e-mailing the members a prepared map with 5-year population projections. Although areas of projection remain the same as last year, he noted that numbers would be much smaller. He discussed with members the dramatic changes in housing. Mr. Boling reminded the group that only new developments would be going through the actual school concurrency test and those approved before July 1<sup>st</sup> 2008 would not be subject to the test. He did not believe there would be any main school concurrency review pickup until the end of the 5 year projection and for the time being the group would only be dealing with enrollment projections. Members discussed various subdivisions and developments and Mr. Boling concluded by saying that the process is in place with the key being to continue as before while being prepared for when things pick up.

Ms. Bosworth inquired about the ramifications for a subdivision in COS with infrastructure but no final plat. When new plat comes in will they have to do school concurrency? Mr. Boling said if infrastructure is already in and prelim is expired then it starts the process all over and would probably have to submit to a conditional concurrency test.

Ms. Olson reported on the current preliminary data stating how quickly things can change in a year. She emphasized that they are in the process of updating data but that schools that have had issues and continue to have issues are Fellsmere and Treasure Coast Elementary. She stated that Fellsmere was a small site and there wasn't anything they could do about it, at which point Mr. Nunemaker interrupted with a request to discuss the issue further. He said he remembered their conversation from several years ago when they had talked about potential site acquisition and since then he believes that the School Board's perspective for elementary school sizes has changed toward the larger. Ms. Olson concurred. Mr. Nunemaker asked if there was any possibility of doing a retrofit of Fellsmere Elementary noting that there were three homes in foreclosure next to the school. The group discussed the idea and Ms. Olson asked Mr. Nunemaker if they could work together to bring it to the site selection committee. Ms. Johnson felt it was vital to keep the Fellsmere community intact and supported the idea. Mr. Bradshaw wanted to know how much expansion was planned and how much it would cost and Mr. Nunemaker replied it would be up to School Board but thought it may not be too hard to expand a wing. Ms. Olson said that answers to Mr. Bradshaw's questions would be available after preliminary discussions with all interested parties had concluded.

Ms. Olson continued her report saying that Treasure Coast had empty portables yet student population still had growth potential and she thought it would be wasteful to just remove them only to replace them again. She said that they would continue to look at Treasure Coast. Members discussed the variable impacts of class sizes, government mandates, and funding.

Ms. Olson then brought up Beachland Elementary saying that she was surprised to find it at 105% which wasn't a problem at the moment but with the relocation of St. Edward's Lower school and the school adjacent to Beachland being Vero Beach Elementary, she foresees the situation becoming sensitive with parents on the island. Ms. Olson asked Mr. McGarry about his thoughts relative to Beachland's growth.

Mr. McGarry said his guess is that as the economy goes there may be more increases but isn't sure of how much it may go and that COV6 may be looking at redevelopment but nothing that would spur influx of more school age population.

Mr. Boling thought it might be helpful to know that St. Edwards, combining both campuses, will be going from approx. 726 to 660 students. He reported that this month they should finish their second phase and should be done in a few weeks. Board members discussed the progress. Ms. Bosworth mentioned Sebastian Charter Junior High had gone before their city council to get a variance on an expansion.

Ms. Olson returned to her report saying there were no other big surprises in the current data. She felt things would be a little flat in enrollments with very small spikes but at least no significant drops. She believed that due to conservative planning IRC is not in the shape of neighboring counties who over anticipated and over planned.

Ms. Olson continued saying that now they would go back and revamp existing schools such as Vero Beach Elementary and Osceola Magnet which will be funded in 2012. They will then focus on multiple mini projects until money becomes available for larger ones. She emphasized that less funding doesn't mean they can't still save money for taxpayers by looking hard into energy and other utility areas.

She concluded that there is an addition going in at Sebastian River High School, a combination Freshman Learning Center/Multi-Purpose room wedged into the center of the campus but still separate.

### 3. DISCUSSION ON MAINTAINING ADOPTED LEVEL OF SERVICES (LOS)

Mr. Boling directed the group in discussion concerning the LOS, mentioning that a few things had already been touched upon. Mr. Boling commended Mr. Nunemaker's idea to expand Fellsmere Elementary and went on to express marvel at how difficult school planning can be when faced with doing so in small increments.

Members then discussed a wide range of topics including Home, Private and Virtual school growth; the social and cultural programs provided by Vero and Sebastian High Schools; and representations of various educational entities at the Science Fair.

Mr. Boling asked if anyone foresaw any zone boundary changes. Ms. Olson said she'd be happy to give a heads up at the appropriate time but that any comment she made right now would be her own personal and would prefer communicating the School Board's direction. She did confirm that it was being looked into at the present time.

Mr. Boling then asked Ms. Olson if she believed zone boundary would be reviewed annually or if it is just something happening at this point in time. Ms. Olson said she did not believe it would be unique, that it will probably become an annual review. Ms. Johnson discussed the difficulty for families when zone boundaries change. The members then had an extensive discussion regarding class sizes.

Responding to questions by Mr. Keating and other board members, Ms. Olson stated: Jefferson County was taken over by the state due to non compliance of class size; IRCSB has done preliminaries and believe they will need 60-80 teachers to meet criteria for classroom size; government could modify size if they wanted to but nothing has happened yet; and that with class size, everything is compliance first and funding second.

Mr. Nunemaker wondered if IRCSB might put the dilemma in terms of millage in order to get government to see the bottom line and really understand the impact of hiring 60-80 teachers. More discussion ensued.

Ms. Olson made the point that IRC really doesn't have a problem with boundaries that overly affect concurrency. She believes that everyone working together over the years has put the County in good position.

#### 4. NEXT MEETING

Mr. Boling reiterated that the group would be meeting again on March 26<sup>th</sup>, prior to which, IRC would provide a draft concurrency assessment report for 2009-2010.

#### 5. OTHER MATTERS

Mr. Boling said he wanted to make sure that Ms. Olson is able to get permit and C.O. data from everyone even if it is "D." She said she has received input from only IRC and COS. Mr. Nunemaker said he hired a new community development director, Mark Mathis, and would have the information to Ms. Olson as soon as possible. Mr. Bradshaw said that TIRS has nothing to report. Ms. Olson asked the members if there was anything more that the IRCSB needed to be aware of. Mr. Nunemaker said projects they wished to do tended to be outside of parameters, needing multiple agreements and by the end of the day, the project is scaled back tremendously. He emphasized that Fallsmead wants their schools to be a part of the focal point for anything they do and an invitation would be happy to put on the IRCSB agenda.

Ms. Olson then gave brief updates to the board concerning Osceola's drainage and easement problems and discussions continued.

During discussion, Ms. Olson mentioned their advisory committee was writing a recommendation to pursue Pointe West and Mr. Keating informed her that the developer believes they are no longer interested. He told her that there is a cutoff date at which point the developer must commit to a school or recreational usage and that IRCSB might wish to communicate with Pointe West soon. Mr. Keating then inquired if the "Ansin" swap had taken place and Ms. Olson said looking at impact fee caused concern and what with the property proposal they will just have to put it on the agenda and ask.

Discussion ensued concerning Charter schools, progress of Imagine Schools, capital funds for Charters through needs assessment /performance measures, percentages for management fees and whether physical improvements could be made on leased property with provided monies.

#### 6. ADJOURNMENT

With no further business to be discussed the meeting was adjourned at 11:06 a.m.



**PUBLIC SCHOOL PLANNING STAFF WORKING GROUP (PSPSWG)**

**MEETING MINUTES**

**Wednesday – March 24, 2010 - 10:00 a.m.**

Conference Room A1-411, County Administration Building "A", 1801 27<sup>th</sup> Street, Vero Beach, FL

Note: Audio of the meeting can be found at <http://www.irccpa.com/boards/PSPSWG/index.htm>

Also, all reports referenced are on file at the Board of County Commissioners and are available upon request.

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**MEMBERS PRESENT**

Robert M. Keating	Indian River County (IRC)
Star Boling	IRC
Jason Nunemaker	City of Fellsmere (COF)
Susan Olson	Indian River County School Board (IRCSB)
Dori Bosworth	City of Sebastian (COS)
Timothy McGarry	City of Vero Beach (COVB)
Carol Johnson	IRCSB

**MEMBERS ABSENT**

Robert Bradshaw	Town of Indian River Shores (TIRS)
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**OTHER**

Mark Mathews	COF Community Development Director
Beth Casano	Recording Secretary

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Mr. Boling called the meeting to order at 10:04 a.m.

**1. APPROVAL OF MINUTES**

Mr. Boling reviewed minor changes made prior to the meeting, i.e. group member name, and two word clarifications.

**On Motion** by Mr. Nunemaker and **Seconded** by Mr. Keating, the group unanimously approved the minutes from the February 5, 2010 meeting as presented with changes.

**2. REVIEW OF THE DRAFT SCHOOL CONCURRENCY ASSESSMENT REPORT FOR 2009-2010**

Mr. Boling began a page by page walk-through of the report in order to point out and receive input on what had been done (addition of one sentence to explain if an improvement is funded) and what still needed to be done.

Following are some of the main points discussed along with 5 (a. + e.-) changes/issues that were brought to a vote toward the end of the meeting:

**a. REFLECT DEMAND CHANGES**

On page two of the report, Mr. Boling pointed out a need to adjust the status tables. He said that Magnet Schools and other Alternative Public Schools are not normally considered into the capacity/demand equations but the closing of Thompson Magnet will affect the Public System and the report needs to show the increase in Demand even though it does not change present capacity. Ms. Olson said that 761 students would be redistributed between Highlands, Vero Beach, and Citrus Elementary Schools.

Answering questions from members, Ms. Olson covered the rebuild project of Vero Beach Elementary beginning in November which, when completed, would add 192 students to capacity. Members then discussed various schools and other subjects that had arisen during the last meeting. Ms. Olson summed up enrollment forecast as being flat.

Ms. Olson said that there were no new Charters in North County's foreseeable future. Members then engaged in serious discussion on the topic of building new schools and how Charters do not have to comply with the same standards/codes as Public Schools. Mr. Nunemaker thought it would be worth it to look further into the issue. He offered scenarios in which this disparity, especially in a volatile economy, could adversely affect a building's future potential. Mr. Keating assured the group that in a case where a developer chooses to build a Charter School and is in the position of having to address school concurrency, the developer would have to comply with the same building requirements as a Public School. All agreed that policies separating Public Schools from other schools has created variables that make school concurrency planning very difficult.

**b. ADD A SUBTEXT SECTION RE: SCADL**

Ms. Bosworth brought up the School Capacity Availability Determination Letter (SCADL). She was curious about how the concurrency numbers would work if a conceptually approved or vested proposed residential development was unable to complete their project. Would the report need to be updated and what happens to the impact fees? In reference to impact fees, Mr. Boling explained the County's 1, 3, and 7, year policies available to developers. Any problems with project completion outside of the 1-year certificate means no cash refund but fee credits would stay with the land. He emphasized that he was explaining IRC policy and was not up to date on how other jurisdictions handle their concurrency certificates. As to affecting the report, up to this point, Ms. Olson said there had not yet been a situation of a defunct development affecting current capacity. Mr. Boling suggested that in order to provide better information, the group might want to add some subtext about the SCADL to the report.

**c. CORRECT TYPO, PAGE 6, FIRST TABLE - THIRD ROW/THIRD COLUMN: 5013 should be 2014.**

**d. ADDITIONAL CHART/COLUMN ADDED WITHOUT MAGNET AND PRE-K CONCURRENCY**

During discussion on elementary school forecast and capacity, Ms. Olson responded to an inquiry by Mr. Keating that she thought that the Magnet Schools were included in the numbers and Mr. Boling stated that they probably shouldn't be as they are transparent. After general discussion about demands that are not being counted, virtual schools, home schools and public schools beginning to get into the "pre-k" business, it was determined that an additional chart should be added to reflect the numbers without magnet and pre-k.

Mr. Nunemaker informed the group that virtual schools had created a Demand for seating and computers to be provided for the on-line students and he wondered if those numbers were also being included. Ms. Olson said they were not and members agreed that it might be a good idea to keep track of those numbers anyway. Ms. Olson said she didn't know what those numbers were but would get the information and provide for the group.

**e. KEEP RECOMMENDED ACTION TO SOLVE THE FELLSMERE ELEMENTARY CAPACITY ISSUE**

Mr. Boling suggested that as a group it would be appropriate to recommend that the District and Fellsmere work together to solve the issue. Members discussed the various reasons why this should be a priority. Mr. Nunemaker felt that there seemed to be a good reception to their expanding/retrofitting the school and that he and Ms. Olson have met on the subject. Mr. Keating recommended that Fellsmere get the expansion into the 5-year facility plan which Ms. Olson believed would be discussed at a School Board meeting in June. Mr. Nunemaker expressed his desire to attend and Ms. Olson said she would keep him informed.

Mark Mathews, Fellsmere's new Community Development Director, was introduced to the group. Members then veered into discussions about various community development projects and needs unrelated to the report.

Mr. Boling redirected the group back to the report and reviewed the discussions.

**On Motion** by Mr. Nunemaker and **Seconded** by Mr. McGarry, the Board Members, in reference to the Indian River County Annual School Concurrency Assessment Report for 2009-2010, unanimously approved the following: reflection in the report of the demand changes created by closing of Thompson; addition of a subtext section on SCAD.; correction of a date on page 6; addition of a chart/column to the Current and Projected LOS so that numbers will reflect both the inclusion and exclusion of magnets and pre-k's; recommendation of action to the School District and City of Fellsmere to continue to work together to meet adopted level of service standard for the Fellsmere Elementary School service area.

General issues were brought up with closing discussion centered around the idea by Ms. Olson that the School Board could use some type of standard document or underlying process similar to what some County departments have that could assist her in addressing smaller, non-controversial tasks. It was suggested that staff involved with these inter-local projects could move quicker and more efficiently if given the authority to approve of small grant and lower cost dedications of easements and right of ways.

As there was no further business, the meeting was adjourned at 11:13 a.m.



## Timeline of Yearly School Planning Activities

- **January:** County Staff provides school district staff with population projections by TAZ (traffic analysis zones, of which there are 154 county-wide). County staff, municipal staff, and school district staff share information on planned capital facilities.
- **February:** Staff Working Group (meeting #1) reviews school concurrency assessment issues, preliminary data on population and student enrollment, discusses school facilities plan and co-location coordination opportunities.
- **March:** Staff Working Group (meeting #2) reviews draft annual school concurrency assessment report and draft school facilities plan, evaluates ability to maintain school LOS (level of service).
- **April:** Citizens Oversight Committee reviews and provides input on the revised draft school concurrency assessment report and draft school facilities plan; evaluates general school planning issues and activities.
- **May:** Staff continue to review and update the draft school concurrency assessment report and draft school facilities; transmit updated drafts to the Staff Working Group members for coordination purposes.
- **June:** Staff send final draft and summary report to the Elected Officials Oversight Committee and other local elected officials.
- **July:** The Elected Officials Oversight Committee reviews and comments on the assessment report and facilities plan; provides direction on school planning issues as needed.
- **July/August:** The Board of County Commissioners, School Board, and City Councils review and approve the annual school concurrency assessment report and draft school district educational facilities plan with or without comments.
- **August:** Staff revise the school concurrency assessment report and revise the draft school facilities plan, if needed, based on comments received; issue the final school concurrency assessment report.
- **September:** The School Board adopts its final facilities plan.
- **September/October:** County and municipal staffs initiate updates to their respective capital improvements elements to include the newly adopted school facilities plan.
- **December:** County and municipalities formally adopt their respective capital improvements element updates.

**Indian River County  
Annual School Concurrency Assessment Report for 2009-2010**

### **PURPOSE OF REPORT**

In February 2008, the County, the School Board, the Town of Indian River Shores, and the Cities of Fellsmere, Sebastian, and Vero Beach, entered into an "Interlocal Agreement for Coordinated Planning and School Concurrency" (ILA). The ILA is in effect, as adopted. Among the components of the ILA was creation of a committee of county, city, and school board staff known as the Staff Working Group (SWG). Section 3.2 of the ILA requires that the SWG prepare an "...annual assessment report on the effectiveness of the school concurrency process". This report is intended to fulfill that section 3.2 requirement, provide background information on school concurrency, and provide a summary of changes that occurred during the report period with respect to school capacity, school demand (enrollment), school service area boundaries, school facility plans, and school level of service (LOS).

### **BACKGROUND**

In 2005, the Florida Legislature adopted SB 360 which, among its various components, mandated that local governments and school districts adopt school concurrency provisions to ensure that the schools needed to serve residential development will be available when the impacts from the residential development occur. For Indian River County, the school concurrency adoption deadline was March 1, 2008, and the county met that deadline. The adopted school concurrency provisions are contained or referenced in the following documents:

- The ILA
- The Public School Facilities Elements of the County and Municipal Comprehensive Plans
- The Capital Improvements Elements of the County and Municipal Comprehensive Plans
- The Intergovernmental Coordination Elements of the County and Municipal Comprehensive Plans
- Chapter 910 (Concurrency Management System) of the County land development regulations

One of the principal components of concurrency is level of service (LOS). Generally, LOS is the relationship between supply and demand. For schools, LOS is expressed as a ratio of student enrollment to capacity. For measuring capacity, the state has established a method based on the number of classrooms and average class size. This method is applied throughout the state and results in a "FISH (Florida Inventory of School Houses) capacity" for each school. In the county's concurrency system, the adopted LOS for public schools in Indian River County is based on this FISH capacity. For Indian River County, the adopted LOS is 100% FISH capacity. That standard applies to each of the following three school levels: elementary, middle, and high.

Overall, the school concurrency provisions and process recognize that the local governments are generally responsible for regulating the "demand" side of student enrollment (approving, approving with conditions, or denying residential development) and that the school board is generally responsible for the "supply" side of public school capacity (expanding existing schools, building new schools). While residential development is reviewed on an individual development project and building permit basis, public school capacity is reviewed and addressed in the school board's Five-Year Facilities Work Program which is also known as the 5 year facilities plan. The 5 year facilities plan provides a 5 year schedule of funding, by fiscal year, of various capital projects including capacity-producing projects. For school concurrency purposes, a capacity improvement is considered in place if it is funded within the first 3 years of the 5 year facilities plan.

For each public elementary, middle, and high school that is not a magnet school or charter school, the school district has established attendance zones, also known as school service area boundaries (SSABs). Those service areas are critical components of the school district's concurrency system. That system is "location-based", tracking the location and intensity of new residential development with the capacity of the affected elementary,

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middle, and high school service areas. As a result, capacity, demand, and available capacity are evaluated on a school service area boundary (SSAD) basis. With this system, concurrency is considered met if there is available capacity to serve a residential development either within the affected school service area or within an adjacent school service area.

## SCHOOL CONCURRENCY STATUS

- CAPACITY CHANGES

**Table 1**

Capacity Changes between 2009/2010 and 2010/2011				
School	New Schools	Additions/ Major Renovations	Closures	Net Change
N/A	N/A	N/A	N/A	N/A

Overall net capacity changes districtwide:

Elementary School Capacity:	0
Middle School Capacity:	0
High School Capacity:	0

Although there were no changes to non-magnet school capacity during the 2009/2010 period, the closing of Thompson Magnet elementary school has been approved by the school district. That closure will increase enrollment demand on south county elementary school service areas, including Highlands, Citrus, and Vero Beach Elementary schools beginning in the 2010/2011 school year. Those demand increases in non-magnet elementary school enrollment are reflected under the "Demand Changes" information provided on page 7.

- DEMAND CHANGES

## ENROLLMENT

In 2009, districtwide enrollment decreased by 97 students, compared to a decrease of 429 students during the previous year. That previous year decrease was attributed to the opening of Imagine Schools on 4<sup>th</sup> Street. Table 2 shows the school district's history of enrollment since 2003.

**Table 2**

### Historic Enrollment 2003-2009

	K-5	Middle	High	Total*	Annual Change
2003	6,984	3,798	4,605	15,387	545
2004	7,166	3,825	4,845	15,836	449
2005	7,710	3,759	4,830	16,299	463
2006	7,624	3,847	4,851	16,322	23
2007	7,653	3,834	4,885	16,372	50
2008	7,258	3,847	4,838	15,943	-429
2009	7,230	3,817	4,799	15,846	-97

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**Table 3  
Elementary School Forecast 2009-2014**

2008	7258	
2009	7230	-28
2010	7268	38
2011	7412	144
2012	7653	241
2013	7938	285
2014	7965	27

For the elementary school enrollment forecast, the school district has assumed that there will be little or no new housing development during the next two years. The district, however, projects that there will be moderate growth between 2012 and 2014. That growth will be driven primarily by an increasing kindergarten enrollment from higher birth trends. This local forecast is 3612 students higher than the 2008/2009 Florida Department of Education (DOE) forecast.

**Table 4  
Middle School Forecast 2009-2014**

2008	3847	
2009	3817	-30
2010	3833	16
2011	3854	21
2012	3811	-43
2013	3785	-26
2014	3725	-60

Projections for middle school enrollment are flat, based on little or no new housing development and a stable incoming 6<sup>th</sup> grade. Around 2014-2015, this trend will change, and the middle schools will begin growing again. This local forecast is 1752 students higher than the 2008/2009 DOE forecast.

\* Projections is for Oct count and varies from the State forecast which includes the average of the Oct./Feb counts.

**Table 5  
High School Forecast 2009-2014**

2008	4838	-47
2009	4799	-39
2010	4782	-17
2011	4777	-5
2012	4867	90
2013	4923	56
2014	4953	30

Generally, high school projections are impacted more by the size of the incoming 9<sup>th</sup> grade than by new housing. For this reason, the high schools may show a decline in enrollment as some smaller classes move through the grades and graduate. Beginning in 2012, however, small increases will have the high school enrollment higher than it has ever been. The forecasted growth is 560 students higher than the 2008/2009 DOE forecast.

\* Projections is for Oct count and varies from the state forecast which includes the average of the Oct./Feb counts.

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Overall, the local enrollment forecast predicts that there will be little or no growth in 2009 and 2010, with modest growth occurring from 2011 through 2013. In July, the school district received the state COFTE (Capital Outlay Full Time Equivalent) student enrollment forecast. Currently, the district is reviewing the state's forecast and will coordinate with the state over the next few months to reconcile differences between the district and state forecasts.

## Ten and Twenty Year Forecast

The district's ten and twenty year forecasts are based on population projections provided by the Bureau of Economic and Business Research (BEBR). These county-wide projections were reduced this past year; consequently, student enrollment projections have also been reduced.

## Population and Enrollment Forecast

	2009	2010	2015	2020	2030
Indian River County Population*	141,475	142,300	155,000	169,300	196,900
Enrollment #	15,794*	15,607	14,654**	16,978	23,627

\*2008-2009 COFTE: Capital Outlay Full Time Equivalent

\*\*The 2015 projection is from the state COFTE projection, and likely will increase with the updated forecast in July

## Permits Issued and Future Units Vested

In Indian River County, school concurrency went into effect on July 1, 2008. From July 1, 2008 to June 30, 2009, permits for construction of 387 residential units were issued. From July 1, 2009 to February 28, 2010, permits for construction of 148 residential units were issued. Based on that rate of issued permits, the number of residential permits for the July 1, 2009 to June 30, 2010 period is estimated to be 222 units or 43% fewer than the previous year (2008/2009). Monthly data for the 2009/2010 period are shown in the chart below.

### 2009/2010 New Residential Units Permitted

Month	Vero Beach	Fellsmere	IR Co.	IR Shores	Sebastian	Total
July 2009	0	0	13	0	2	15
August 2009	0	0	26	0	1	27
September 2009	0	0	11	1	2	14
October 2009	0	2	10	0	3	15
November 2009	0	0	12	1	3	16
December 2009	0	0	11	0	0	11
January 2010	0	5	15	1	3	24
February 2010	0	0	22	1	3	26
March 2010						
April 2010						
May 2010						
June 2010						
TOTALS	0	7	120	4	17	148

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Since concurrency went into effect in Indian River County, each residential unit that was issued a building permit was approved for residential development (e.g. platted lot, development plan approved) prior to July 1, 2008. As such, those units were "exempt" from the school concurrency test. Students anticipated to be "generated" by these units, however, are accounted for in the student enrollment projections prepared by the school district, and under "vested demand" tracked in the school district's concurrency system.

The table below is a summary report from the school district's concurrency system. That table shows that, on March 15, 2010, there was available capacity for every school service area except for the Beachland, Citrus, Treasure Coast, and Fellsmere elementary schools, and except for Sebastian River High School. With the exception of Fellsmere Elementary school, concurrency was met on the other "over capacity" elementary schools (Beachland, Citrus, Treasure Coast) because capacity was available in one or more adjacent elementary school service areas. In the case of Sebastian River High School, concurrency was met because sufficient capacity-increasing improvements are scheduled within the first 3 years of the 5 year facilities plan. Thus the only school service area with a concurrency problem at this time is Fellsmere Elementary.

Report run: 3-15-2010

### Development Review Summary

School Service Area Boundary (SSAB)	Current School Capacity	Programmed School Capacity*	Total School Capacity	Enrollment	**Vested Demand	Total Demand	***Available Capacity
Beachland ES	555	0	555	582	0	582	-27
Citrus ES	573	0	573	575	0	575	-2
Dodgettown ES	608	0	608	483	1	484	124
Fellsmere ES	543	0	543	588	0	588	-45
Glendale ES	623	0	623	498	0	498	125
Highlands ES	584	0	584	431	4	435	149
Pelican Island ES	583	0	583	455	3	458	125
Sebastian ES	637	0	637	566	22	588	49
Treasure Coast ES	299	0	299	616	8	624	-25
Vero Beach ES	559	191	750	535	3	538	212
Gifford MS	1122	0	1122	969	1	970	152
Oslo MS	1117	0	1117	958	3	961	156
Sebastian MS	1141	0	1141	971	15	986	155
Storm Grove MS	1197	0	1197	887	0	887	310
Sebastian HS	1933	570	2503	1968	22	1990	513
Vero Beach HS	2771	0	2771	2685	4	2689	82

\*Programmed Capacity includes all new capacity budgeted for construction in the next three years.

\*\*Vested Demand includes the expected student yield from all development approvals since July 1, 2008.

\*\*\*The adjacency rule allows development approvals where space is available in an adjacent SSAB. Available Capacity may indicate a negative balance until the school district has taken action.

- SERVICE AREA BOUNDARY CHANGES

The major change in Service Area Boundaries arose from the opening of Storm Grove Middle School in August of 2009. At that time, the Storm Grove (aka "Middle School BB") service area was added to the middle school service area boundaries, as shown on the attached map.

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## • FACILITIES PLAN AND LOS

### Facilities Work Plan

By law, the school district's facilities work plan or capital plan must balance to projected revenue. Within the 5 year facilities plan, capital projects are divided into several categories, including new construction, renovations, maintenance, furniture and equipment, and technology.

In the school district's facilities work plan that was adopted in September 2008, the projected 5 year expenditures were \$220,000,000, with roughly \$100 million programmed in 2008/2009. During 2008/2009, actual capital expenditures were significantly less than \$100 million due to the intentional delay of several projects. Consequently, capital projects were pared-down in the facilities work plan that was adopted in September 2009, as well as the draft plan being developed for school board consideration in 2010. Overall, those capital projects that have the most direct effect on school concurrency are capacity enhancement projects.

As drafted, the FY2010-2014 Facilities Work Plan includes funds for the completion of capacity enhancement projects at Vero Beach Elementary, Sebastian River High School, and Osceola Magnet as shown in the table below:

### Capacity Producing Projects

Capacity Enhancement Projects	Capacity Added	Estimated Completion
New Elementary School C (Fellsmere/north county)	750	2015
Addition to Sebastian River High School	570	2013
Replacement of Vero Beach Elementary School	191	2012
*Replacement of Osceola Elementary School at Pointe West	192	2014

\* Involves a magnet school: not considered for school concurrency capacity or demand

### Current and Projected LOS

In 2008, middle school enrollment exceeded 100% capacity. With the opening of the new middle school in 2009, however, all middle schools are projected to be below 90% utilization.

District-wide, the projected LOS at all grade levels is expected to be below 100% utilization through 2013. Although there are regional differences at the School Service Area Boundary level, the school district is expected to make the best use of available capacity and adjust boundaries (as with the actions this year) where feasible.

### Enrollment & Capacity Forecast: all public schools including magnet and pre-K\*

Year	Elementary Forecast	Elementary Capacity	% util	Middle Forecast	Middle Capacity	% util	High Forecast	High Capacity	% util
2008	7316	8228	89%	3826	3351	114%	4666	4866	96%
2009	7290	8228	89%	3776	4548	83%	4665	4966	94%
2010	7328	8228	89%	3782	4548	83%	4646	4966	94%
2011	7472	7671	97%	3801	4548	84%	4645	4966	94%
2012	7713	7862	98%	3757	4548	83%	4735	4966	95%
2013	7998	7862	102%	3725	4548	82%	4791	5536	87%
**2014	7965	8054	99%	3725	4548	82%	4953	5536	89%

\*Does not include special schools (Wabasso School, Alternative Learning Center)

\*\*2014 updated forecast not available until April

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The table above provides enrollment information for all public schools except special schools. Because magnet schools and pre-K are not included in public school concurrency determinations, it is necessary to track enrollment and capacity for all non-magnet, non-pre-K, and non-special public schools. Accordingly, the table below is provided to show enrollment, capacity, and utilization of school concurrency services areas, and does not include the capacity or the demand of magnet schools and pre-k.

## Enrollment & Capacity Forecast: public schools excluding magnet and pre-K\*

Year	Elementary Forecast	Elementary Capacity	% util	Middle Forecast	Middle Capacity	% util	High Forecast	High Capacity	% util
2008	5227	5978	87%	3826	3351	114%	4666	4866	96%
2009	5380	5874	92%	3776	4548	83%	4665	4966	94%
2010	5673	5874	97%	3782	4548	83%	4646	4966	94%
2011	5804	5874	99%	3801	4548	84%	4645	4966	94%
2012	6047	6065	98%	3757	4548	83%	4735	4966	95%
2013	6329	6065	104%	3725	4548	82%	4791	5536	87%
**2014	5600	6065	92%	3725	4548	82%	4953	5536	89%

\*Does not include special schools (Wabasso School, Alternative Learning Center)

\*\*2014 updated forecast not available until April

## SCHOOL CONCURRENCY & COORDINATION PROCESS

Consistent with the provisions of the ILA, staff from the school district, county, and municipalities share information and meet regularly on school planning and concurrency issues. Under the ILA, the county is required each year to provide school district staff with population projections for 154 neighborhood-sized areas known as traffic analysis zones (TAZs). In addition, the county and municipalities are required to provide the district with data on proposed residential development projects, residential building permits, and residential certificates of occupancy. These data are intended to aid district staff in preparing student enrollment projections by school service area. Each year, district staff is required to provide enrollment projections by school service area. Those projections are reviewed by county and municipal staff, and are incorporated into the district's 5 year facilities plan.

Besides its other provisions, the ILA also establishes a school concurrency review process for residential comprehensive plan amendments, rezonings, and development plan requests. That process requires applicants to provide development information to the district for school concurrency review purposes, and requires district staff to issue school capacity availability determination letters (SCADL). A SCADL identifies the amount of available school capacity and includes a determination as to whether or not sufficient school capacity exists to serve a proposed residential development.

Conditional SCADLS provide a "snap-shot in time" regarding available school capacity for a project, while final SCADLS involve payment of impact fees and vesting (guaranteeing and reserving capacity) projects. If a final SCADL review shows that additional school capacity is not currently available to serve a proposed residential project, then the applicant may pursue mitigation options that are approved by the school district as provided in the ILA and adopted concurrency policies and regulations. Mitigation may include school additions or other capacity-producing measures. Neither the county nor the municipalities are allowed to approve a residential development project unless adequate school capacity is available or will be made available to serve the project.



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- SCADLS ISSUED DURING 2009-2010

## Conditional SCADLs

The following table provides information on each conditional SCADL issued by the school district during the 2009-2010 period.

### **Conditional SCADLs Issued 2009/2010**

<b>Project</b>	<b>Elementary</b>	<b>Middle</b>	<b>High</b>
Pointe at Chesser Gap	Sebastian - 22	Sebastian - 11	Sebastian - 14
Ocean Bluff (FKA Windsor Prop)	Pelican Island - 3	Gifford - 1	Sebastian - 2
Quail Ridge	Treasure Coast - 8	Sebastian - 4	Sebastian - 5
Vero Lago	Dodgetown - 1	Sebastian - 1	Sebastian - 1
Wolfe Ridge	Vero Beach - 1	Oslo - 1	Vero Beach - 2
Grace Woods West	Highlands - 4	Oslo - 2	Vero Beach - 2

## Final SCADLs

No Final SCADLs were issued by the school district during the 2009/2010 period.

## **CHALLENGES, ISSUES, AND RECOMMENDATION**

- Concurrency System

Initial implementation of the school concurrency process occurred during the 2008/2009 report period. Due to market and overall economic conditions, the number of residential projects subject to school concurrency review during both the 2008/2009 and the current 2009/2010 reporting periods was minimal. As a result, only a few school concurrency evaluations have been made under the new system. After initial adjustments were made during the 2008/2009 report period, the school concurrency process has operated adequately and in a timely manner. Therefore, no changes to the school concurrency process are recommended at this time, and no actions are required.

- Level of Service

Currently, the school concurrency system indicates that the Fellsmere Elementary School service area is over capacity by 45 students. Since there is no excess capacity in the one adjacent elementary school service area (Treasure Coast Elementary School) and since there are no capacity-increasing improvements funded within the first 3 years of the 5 year facilities plan, adequate elementary school capacity is not being maintained for the Fellsmere Elementary School service area at this time. For budgetary and other reasons, the school district's plan to build a new \$18,000,000 elementary school in the north county/Fellsmere area is no longer in the first 3 years of the district's 5 year facilities plan. At this time, construction of the new north county/Fellsmere area "Elementary School C" is not funded until fiscal year 2014. In addition, there are no plans to expand Fellsmere Elementary's capacity due to the physical limitations of the existing site. Recently, however, school district and Fellsmere staff discussed a potential capacity-increasing improvement involving expansion of the Fellsmere Elementary School facilities on adjacent sites. If implemented, the expansion could address the Fellsmere Elementary School service area concurrency issue for a number of years.

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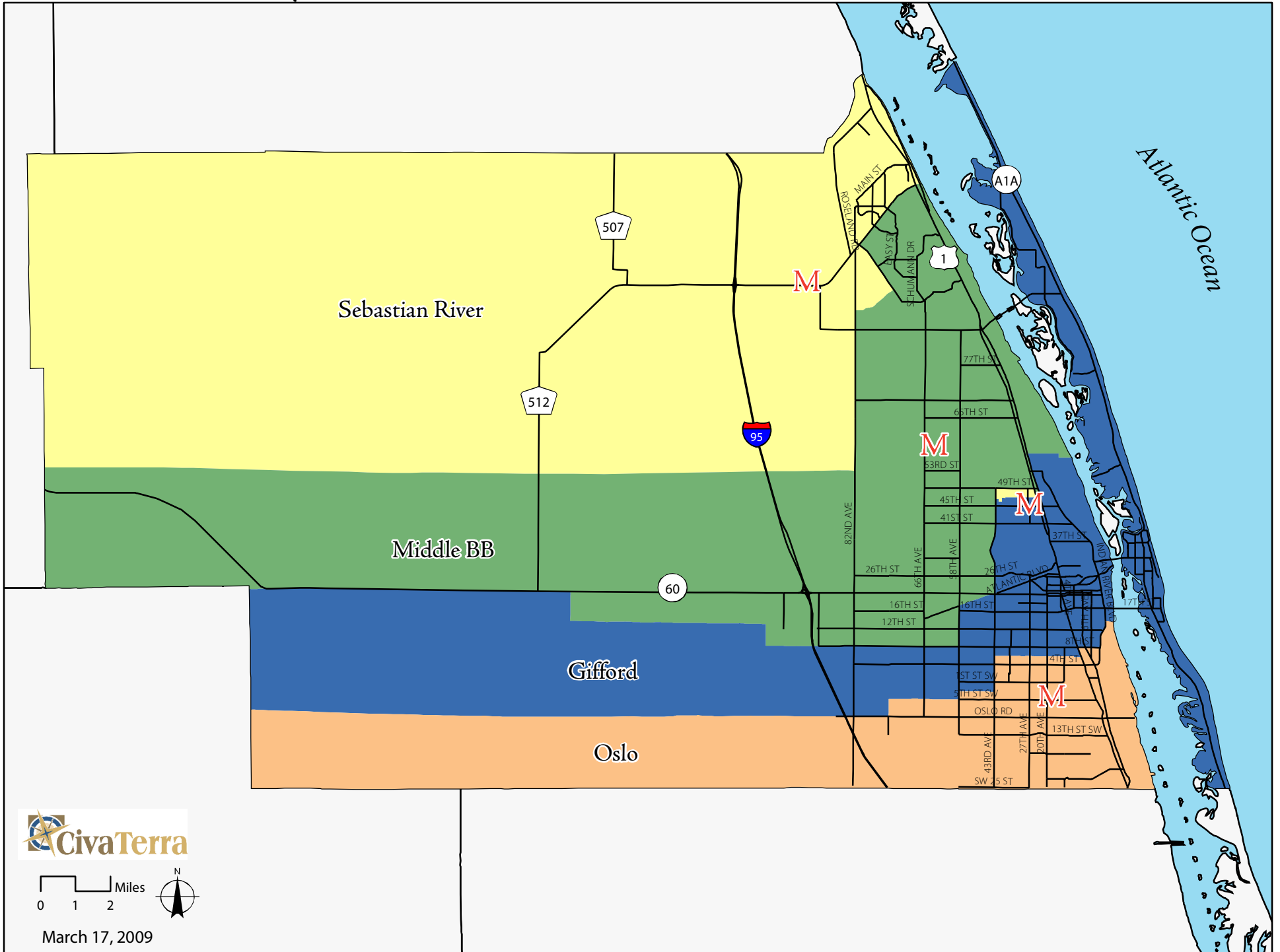
- Recommendation

The Public School Planning Staff Working Group recommends that the School District and City of Fellsmere continue to work together to meet the adopted level of service standard for the Fellsmere Elementary School service area.

## ATTACHMENT

1. School Service Area Boundary Map

# Indian River County Middle School Service Area Boundaries 2009-10



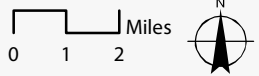
Sebastian River

Middle BB

Gifford

Oslo

Atlantic Ocean



March 17, 2009