Overview of the 2012 Capital Improvement Plan

Chapter 1 presents the **Planning Context** consisting of a brief introduction to the school district followed by state statutes and regulations for school facilities. The chapter continues with demographic data for Sarasota County and an update of the planning issues facing all local governments. A section on the county's economic situation, and the related population and student enrollment projections, is then followed by historical and projected capital revenues.

Chapter 2 on **Planning Process and Components** begins with a description of the annual planning process including enrollment forecasting methods and the impact of the 2008 amended *Interlocal Agreement for School Facility Planning*. The chapter continues with details on the way in which FISH, program, and ultimate capacity measures are determined; this capacity differentiation forms the foundation for the district's Levels of Service as part of School Concurrency which began in 2008. This section includes a table displaying all schools' permanent and total program capacities and current utilization rates based upon 2012-13 enrollments. This chapter concludes with the *2012 Capital Projects Matrix* for funded projects, planned projects, and long term issues under study

Chapter 3 presents **Goals, Strategies, and Recommendations** for the district's capital projects to be implemented in the 2012-13 year, and for the many issues to be studied this year for implementation later. The goals are to:
    (1) Ensure the most efficient and effective use of all facilities by implementing an integrated system of school rebuilds, relocatable reduction, and attendance zone and program changes
    (2) Maintain, renovate, or replace the facilities most in need on a systematic schedule to guarantee safe, up-to-date facilities that meet diverse program needs;
    (3) Implement the current Instructional Technology Plan to ensure that all students and teachers have access to the latest educational technology; and,
    (4) provide for the systematic replacement of equipment and materials.

Chapter 4 provides details on the **Planning Cycle**, denoting in particular the times in which school and site administrators can request smaller renovation and remodeling projects.

An Appendix includes a **Glossary** of school facility terms.

Note that the **Alphabetical Index of Schools and Sites** on page 2 provides the page references for all facility projects and data.

ALPHABETICAL INDEX OF SCHOOLS AND SITES

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CHAPTER 1 -- PLANNING CONTEXT

INTRODUCTION

The School District of Sarasota County [SDSC] has a 2011-12 SY enrollment of 41,429 PK-12 students, making it the 19th largest school district in Florida. The district operates 23 elementary schools, seven middle schools, six high schools, one K-8 school, three exceptional education schools, and a variety of alternative and special schools. The oldest permanent facility opened in 1926, the newest in 2010. The School Board has also authorized 16 charter schools since their inception here in 1997; nine are currently in operation, with another scheduled to open in August, 2013.

For the period 1995 through 2004, the district's yearly enrollment growth ranged from 2.2% to 4.9%; total enrollment growth during that period exceeded 11,000 students, bringing total enrollment to 41,116. The district accommodated this increase through a combination of new schools, classroom additions, and relocatables. At the same time, the district implemented the first stages of class size reduction and rebuilt a number of outmoded schools. Finally during this period, capital revenues increased significantly, almost entirely due to a doubling of local sources thanks to an expanded tax roll and steeply increasing valuations.

Since 2004 the district's enrollment has remained between 41,000 and 42,000 students. Initially, the primary cause for the lack of growth seemed to be fewer families moving to Sarasota County due to a lack of affordable housing for families with children and perhaps to a lesser extent to recent damaging hurricanes elsewhere in the state. In 2012 it is clear that the "Great Recession" has resulted in both an out-migration of younger families seeking better employment opportunities and a decrease of in-migration.

Since the early 1980's, determining when, where, and how to provide additional schools was a major challenge that stretched the district's capital budget. As later sections of this chapter will detail, student enrollment is expected to remain at its current level for a number of years. At the same time, an expected increase in enrollment at charter schools and virtual schools will reduce the enrollment at our traditional schools. The district has no plans to construct another growth-related school during the next five years, at least.

The district's capital projects, therefore, will shift from new construction to asset preservation, replacement of HVAC systems, and efficiency of space utilization. This CIP's goals, measurable objectives, and data-driven decision-making are designed to assure equity of resources, fairness of priorities, and credible time lines for all projects.

This chapter of the plan:
- outlines state planning requirements
- sets the demographic and economic contexts for making enrollment and facility decisions
- summarizes school enrollment projections, and
- summarizes the revenues available for competing capital projects.

STATE PLANNING REQUIREMENTS

1. The State of Florida, by statute and rule, exercises considerable control over the education of students throughout Florida's 67 counties. Public educational facility requirements are found in Chapter 1013, Florida Statutes:
   - Section 1013.35 sets forth the requirements for the "Tentative District Educational Facilities Plan" including
     - planning in 5-year, 10-year, and 20-year increments
     - coordinating with local government comprehensive plans
     - projecting student enrollments based upon state and local data
     - anticipating expansions or closures of existing schools
     - projecting facility needs
     - sharing information on leased and owned relocatables
     - describing general locations of future school sites

- o listing options for reducing the construction of permanent student stations
- o scheduling major repair and renovation projects
- o scheduling anticipated capital revenues

Ultimately, the state-mandated Plan must provide a "financially feasible district facilities work program" for the next five-year period.

- section 1013.31 requires an "educational plant survey" to be completed at least every five years
- section 1013.14 sets forth the rules for purchase of property for educational use
- section 1013.24 sets forth the rules for eminent domain
- section 1013.20 sets standards for the use of relocatables
- section 1013.36 sets the rules for site planning and selection
- section 1013.371 mandates compliance with the Florida Building Code and Florida Fire Prevention Code
- section 1013.372 contains criteria under which new school facilities must be built to serve as emergency shelters.

The Tentative District Educational Facilities Plan is transmitted to the Florida Department of Education, Office of Educational Facilities [FDOE] by October 1 each year, after adoption by the School Board. The first year of the five-year plan serves as the district's capital budget.

2. The district's current Educational Plant Survey was approved by FDOE in June, 2011, and is available in the Long Range Planning office. This document verifies which of the district's intended capital projects are "survey approved" and therefore eligible to be funded by state revenues.

3. Section 1013.33, F.S., repeats the requirements of s. 163.3177, F.S., which mandates an interlocal agreement [ILA] between local governments and district school boards for school facility planning. The original 2002 statute required processes to
- ensure agreement on population and student enrollment projections
- coordinate school districts' plans to construct, enlarge, or close educational facilities
- coordinate local government plans for development and redevelopment
- collaborate on the timing and costs to provide onsite and offsite infrastructure improvements to support school facilities
- allow the local government to comment on the school district's five-year facilities work plan and the plant survey
- allow the school district to share the potential impact of proposed residential development on school capacity
- encourage the co-location and joint use of school facilities with community amenities
- implement an oversight component.

In Sarasota County, the school district, county, and all four municipalities adopted the original **Interlocal Agreement on School Facility Planning** in May, 2004. The Florida Department of Community Affairs [DCA] approved the document effective July 2004. Since then a staff working group of planning representatives from each entity has met periodically to implement the requirements of the ILA. Each party to the agreement has appointed a citizen to an oversight committee that reviews implementation of the ILA and issues a report yearly. From 2005 through 2009, the legislative bodies of all parties convened yearly to review and amend the ILA. The 2010, 2011, and 2012 Convocations were cancelled due to the lack of critical action items.

The 2005 Legislative Session amended these ILA statutes to require that all local governments revise their comprehensive plans to adopt school concurrency by December 2008. Later in 2005, Sarasota County and the School District of Sarasota County volunteered to be, and were subsequently appointed by DCA as, one of six pilot communities for the adoption of the school concurrency requirements. The county and school district each received $100,000 to provide consultants to conduct data and analysis of school capacities and to revise both the ILA and the relevant comprehensive plan elements. The pilot project was completed September 1, 2006, with the submission of four work products to DCA. The ILA was amended

early in 2008 to allow School Concurrency to be implemented October 1st. Since then, the district's Long Range Planning staff has worked closely with each local government's planning office to ensure that all proposed residential developments comply with this requirement. As of this time, there have been no compliance issues as there has been sufficient capacity for the very few developments proposed.

4. The 2002 passage of s. 163.3174(1), F.S., mandated the appointment of a school district representative to all Local Planning Agencies [LPA]. Since 2003 the district's Long Range Planning Director has participated actively as a non-voting member on all five such boards, except for the Town of Longboat Key as they are virtually built-out, have only about two dozen students, and have no schools.

DEMOGRAPHIC CONTEXT OF SARASOTA COUNTY

Sarasota County comprises 572 square miles on the southwest Florida coast about 60 miles south of Tampa, and 60 miles north of Ft. Myers. The county consists of four municipalities plus the unincorporated county. Each has its own history, character, and land use goals. Three of the four municipalities lie along the coast where most of the development has occurred. County Government has established an Urban Services Boundary, generally along I-75, east of which the land is generally reserved for semi-rural, rural, agricultural uses, or "villages."

From 1995 to 2010, Sarasota County's population increased from 301,528 to 379,448, a 25% increase. The recent population history and the school district's actual enrollments are displayed in Table 1-1.

Table 1-1: Countywide and School District Enrollments

YEAR	COUNTY POPULATION	YEARLY GROWTH	SCHOOL ENROLLMENT	YEARLY GROWTH
2001	334,023		36,998	
2002	339,684	1.7%	37,859	2.3%
2003	348,761	2.7%	39,200	3.5%
2004	358,206	2.7%	41,116	4.9%
2005	367,867	2.7%	41,861	1.8%
2006	379,386	3.0%	41,843	0.0%
2007	387,461	2.1%	41,967	0.3%
2008	393,608	1.6%	41,020	-2.3%
2009	389,320	-1.1%	41,165	0.4%
2010	379,448	-2.6%	40,695	-1.1%
average annual growth		*1.67%*		*1.05%*

Sources: Sarasota County Government; SDSC Budget Office

Table 1-2 displays the relationship between county population and school enrollments since 1980, and also projects future school enrollments at a rate of 11% of the county's projected population attending district schools.

Table 1-2: Population and School Enrollments

YEAR	COUNTY POPULATION	DISTRICT ENROLLMENT	SCHOOL PERCENTAGE OF TOTAL
1980	202,251	23,932	11.8%
1985	238,013	24,920	10.5%
1990	277,776	27,715	10.0%
1995	301,528	30,423	10.1%
2000	325,957	35,611	10.9%
2005	367,867	41,861	11.4%
2010	379,448	40,695	11.0%
2015	*414,600*	*45,606*	*at 11%*
2025	*478,000*	*52,580*	*at 11%*

Sources: Sarasota County Government; SDSC Office of Long Range Planning

The racial compositions of the county and state are displayed in Table 1-3.

Table 1-3: 2010 Racial Comparison

RACE	COUNTY	STATE
White	90.2%	75.0%
African American	4.7%	16.0%
Native American	0.2%	0.3%
Asian	1.3%	2.3%
Other Race	2.0%	5.1%
Two or More Races	1.6%	2.4%
Source: US Census Bureau		

Table 1-3a displays a 21-year summary of the district's K-12 racial composition, by percent. It is interesting to note both the changes over time in the racial composition, as well as the contrast between the composition of the county population [above] and the school enrollment [below]. As in much of the nation and state, the total ethnic/racial minority population is increasing. Though the percentage of Black students is decreasing, this segment is double the county average of 4.7%. Hispanic students are now the largest minority in the district and are almost double the countywide average of 7.9%.

Table 1-3a: Racial Composition of K-12 Enrollment Since 1990

	1990	1997	2005	2011
White	86%	82%	74%	70%
Black	11%	10%	9%	9%
Hispanic	3%	5%	11%	14%
Asian	2%	1%	2%	2%
Native American	<1%	1%	<1%	<1%
Multi	n/a	n/a	4%	5%
totals differ from 100% due to rounding				

Source: SDSC Budget Office

The age group compositions of the county and state are displayed in Table 1-4. The county's student-age and child-bearing age residents comprise a much smaller percentage of county residents than statewide.

Table 1-4: 2010 Age Group Comparison

AGE GROUP	COUNTY	STATE
Birth - 19	15.7%	21.3%
20-34	12.2%	18.7%
35-49	16.6%	20.4%
50-64	22.4%	19.6%
65+	31.2%	17.3%
Source: US Census Bureau		

The 2010 population by jurisdiction are displayed in Table 1-5.

Table 1-5: 2010 Population by Jurisdiction

City of Sarasota	51,917
Town of Longboat Key	6,888
City of North Port	57,357
City of Venice	20,748
Unincorporated Area	242,538
TOTAL	379,448
Source: US Census Bureau	

The City of Sarasota consists of 14.62 square miles in northern Sarasota County adjacent to Sarasota Bay. Its population grew rapidly from the 1940s through the 1960s, and reached 50,000 in 1978. The current population is 51,917 per the 2010 US Census. Most city land is built-out and current building permits are typically for redevelopment projects in or near downtown. The city has also sought to revitalize its numerous older neighborhoods with efforts including streetscape projects. The city's K-12 enrollment has decreased during the past decade, though recently some school enrollments have

increased as families have shared homes. Since 2005, significant school projects within the city have included:

- Bay Haven School – a parking lot for staff and visitors
- Southside Elementary – the 2005 completion of major renovations to its 1926 building, a new cafeteria, a new two-story classroom building, and new traffic routing

Current projects include:

- Booker HS – the rebuild of most of the campus
- Sarasota HS – a Master Plan that will result in major classroom renovations, a new gymnasium, a new cafeteria, and site improvements.

The Town of Longboat Key sits on a barrier island, 10 miles in length and less than one mile wide, with a total land area of 4.26 square miles. The northern half lies in Manatee and the southern half in Sarasota counties. The peak season population swells to over 22,000. The average age is 70 years. Most of Longboat Key is already developed with single family homes, condominiums, golf courses, and some commercial property. Most of the recent building permits are for renovations or for the redevelopment of existing dwellings. In FY2012 there were less than two dozen students in the Sarasota County portion of Longboat Key. The town has had the ability to exempt itself from various school coordination regulations, but has chosen to participate. There are no schools on Longboat Key, and none are contemplated.

The City of North Port was originally planned and designed in the 1950s by General Development Corporation [GDC] as one large subdivision for retirees. They platted 65,000 quarter-acre lots which they sold worldwide. GDC built 800 miles of roads, numerous drainage canals, and minimal water and sewer lines. They set aside little if any acreage for recreation, school, or commercial sites. This lack of infrastructure and economic diversity continues to challenge the North Port government and the school district. North Port grew at about the countywide average until the late 1980s after which the city grew at double the county rate through the 1990s. Since 2000, North Port has increased almost three fold from about 19,000 residents to over 57,357 currently. North Port became the one locale where homes are relatively affordable, and student enrollment increases have been much above the countywide average. Predicting where the students

will live within the original platted lots remains a daunting task. Over the past ten years the City of North Port has annexed large portions of the unincorporated area both west and northeast of the original GDC development. North Port is now the state's third largest city in acreage. The 8,000 acre West Villages portion of Thomas Ranch has been approved within a Villages model of diverse residential, commercial, and Town Center uses. The first few residential phases are under construction, though the pace is slower now than just a few years ago. West Villages may comprise 15,000 dwelling units and as many as 37,500 residents in 15-20 years. An elementary school site is identified on the master site file. Even in North Port, school enrollments have leveled off, but growth is expected to resume once the recession ends. The City of North Port Neighborhood Development Services Department and the SCPS Long Range Planning office have a collaborative working relationship such that consistency of projections, coordination of infrastructure, and co-location of resources are a realistic goal. Since 2005, significant school projects within the city limits have included:

- Atwater Elementary – opened in 2009
- Glenallen Elementary – substantial renovations and a new cafeteria, completed in 2006
- Lamarque Elementary – opened in 2006
- North Port HS – the opening of the final classroom wing and an expansion of the food service facility
- Toledo Blade – a complete renovation including HVAC
- Woodland MS – opened in 2008

Current projects include:

- North Port Bus Depot – site acquisition and development of a school bus depot
- Eighth Elementary – site identification for future acquisition.

The City of Venice was one of the earliest planned cities in the country, planned by John Nolen for the Brotherhood of Locomotive Engineers in the 1920's. The city very nearly doubled in population between 1960 and 1970, and again between 1970 and 1980. The growth rate has declined since then as the city approached build-out. What is now referred to as the "Island of Venice" was created in 1967 when the Army Corps of Engineers completed the Intracoastal

Waterway through the city. For many years Venice consisted of about 9.3 square miles, including the Island of Venice and surrounding neighborhoods. In the past ten years, the city has annexed large parcels northward along Pinebrook Road and out Laurel Road east of I-75. Most of the building permits are now for redevelopment in the original city, plus numerous, large residential and commercial developments in the annexed areas. Since 2005, significant school projects within the city limits have included:

- Venice Elementary – the rebuild of the entire campus

Current projects include:

- Venice HS – the rebuild of most of the campus

The Sarasota County Board of County Commissioners governs the unincorporated portions of the county. After years of study, Sarasota County Government's 2006 Comprehensive Plan incorporated the "Sarasota 2050" plan to foster a diverse and sustainable community, incorporating such principles as

- preserving environmental systems
- avoiding urban sprawl
- preserving rural character, including land for agriculture
- providing central utilities
- conserving water and energy
- supporting affordable housing
- strengthening existing communities.

The Sarasota 2050 visionary plan offered incentives to large landholders to develop villages, hamlets, or settlement areas in the existing semi-rural and rural land use designations where 5- and 10-acre tracts now exist. These communities would include certain concentrations of housing, commercial, services, and open space; an elementary school would be designated for each of the three proposed villages. By 2011 only the Villages of Lakewood Ranch South had taken advantage of this Village plan; the first of 5,500 dwelling units may come on line by 2014. Otherwise, residential development in the unincorporated part of the county has slowed to a trickle. Since 2005, significant school projects in the unincorporated county have included:

- Phillippi Shores – a total rebuild, finished in 2005
- Riverview HS – a rebuild of most of the campus; opened in 2010

- Suncoast Polytechnical HS – opened in 2008
- Tatum Ridge Elementary – opened in 2005
- Triad Alternative School – relocated this program into a renovated space formerly occupied by the CYESIS Program
- Wilkinson Elementary – a rebuild of most of the campus, completed in 2007

Current projects include:

- Booker MS – a total HVAC renovation
- Laurel Nokomis School – a total HVAC renovation
- Sarasota MS – a total HVAC renovation
- SCTI – the total rebuild of this campus, including renovations to the Law Enforcement Academy and the construction of the softball and baseball fields for Riverview HS.

ECONOMIC CONTEXT

Sarasota County's economic context is highly reflective of the median age of county residents [53 years] and of the county's status as a destination for tourists and winter residents. Sarasota County's employment sector includes 56% services; 14% retail trade; 9% finance, real estate, and insurance; 7% construction; 5% government; 4% manufacturing; and 5% other. The School District of Sarasota County is the county's largest employer, with over 5,600 employees. The county's unemployment rate, always less than 4% from 1995 to 2006, has typically been less than state and national rates. The following table reveals how hard this area has been hit by the current recession.

Table 1.6: Recent Comparable History of Unemployment Rates

Unemployment Rate [%]						
	2006	2007	2008	2009	2010	2012[Feb.]
Sarasota	3.1	4.3	6.7	11.2	12.2	9.2
Florida	3.4	4.0	6.0	10.5	11.5	9.4
U.S.	4.6	4.6	5.8	9.3	9.6	8.8

Source: U.S. Bureau of Labor Statistics

The current recession has had a huge effect on local families. The school district's percentage of students on Free/Reduced Meal status has grown from an historical average of about 32% to 47% this year. Table 1.7 portrays these changes since 1991.

Table 1.7: History of Free and Reduced Meal Percentages
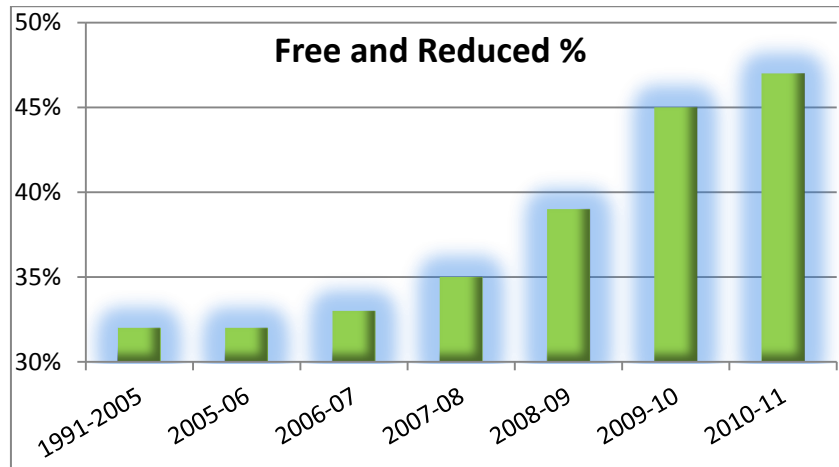
Source: SDSC Food and Nutrition Services

For decades, a significant economic driver has been "the arts." The area is home to numerous professional theaters, orchestras, opera and ballet companies, art galleries, choral societies, and performing centers. The area also hosts music, comedy, and film festivals.

From the early 1990's until about the year 2000, the relationship between Median Income and Median Home Price in Sarasota County remained relatively constant. From 2000 until early in 2005, however, the median home purchase price rose over 70% while income rose only 14%, altering the housing patterns throughout much of the county. Only 48% of homes were then affordable to families earning the area median income. At the same time, the number of rental units decreased as many apartment complexes converted to condominiums. A couple local governments considered some type of mandatory or incentive-based proposal to increase the inventory of affordable

housing, and some major employers were considering supporting the construction of housing developments to ensure a supply of workers in critical areas.

It should be noted that the initial 2004 ordinance for an Educational System Impact Fee [SIF] included an exemption for affordable housing. Applicants for such have been processed by the Sarasota Office of Housing and Community Development. Sarasota County was one of the first Florida counties to ensure that school impact fees did not have a negative impact on the availability of affordable housing. In late 2010, at the request of the School Board, the Sarasota Board of County Commissioners amended the SIF ordinance to enact a two-year moratorium on the assessment of this fee, through December 2012.

Recent Census data indicates that the housing costs of area homeowners have decreased, but that incomes fell more. Statewide the median household income fell $3,400 between 2007 and 2010; the decrease was $4,100 in Sarasota County.   [Sarasota Herald-Tribune, December 26, 2011]

The latest comparable housing patterns are displayed in Table 1.8.

Table1.8: Housing Unit Comparisons, 2010

HOUSING UNITS	COUNTY	STATE
Occupied	76.9%	82.5%
Vacant	23.1%	17.5%
Vacant for rent	*14.7%*	*23.7%*
Vacant for sale	*10.0%*	*12.6%*
Seasonal/recreational	*59.5%*	*41.9%*
Non reported	*15.8%*	*21.8%*
Source: US Census Bureau		

For the past few years the Sarasota County tax roll has decreased due to the failing housing market and the minimal new construction. The 2010 taxable values, by jurisdiction, are displayed in Table 1-9. The downward trend of taxable values is displayed in Table 1-10.

Table 1-9: 2010 Taxable Values by Jurisdiction

Jurisdiction	Taxable Value
City of Sarasota	$7,322,222,525
City of Venice	$2,849,902,357
City of North Port	$2,471,693,077
Town of Longboat Key [Sarasota County only]	$3,504,013,002
Unincorporated County	$25,980,234,397

Source: Sarasota County Property Appraiser's 2011 Annual Report

Table 1-10: Taxable Value Trends by Jurisdiction

Taxable Value Trends [$ Billions]

Year	Unincorp. County	City of Sarasota	City of Venice	Town of Longboat Key	City of North Port	Total County
2005	$ 28.71	$ 7.59	$ 3.05	$ 4.15	$ 2.95	$ 46.45
2006	$ 36.39	$ 9.71	$ 4.15	$ 4.73	$ 4.93	$ 58.91
2007	$ 37.63	$ 10.33	$ 4.36	$ 4.72	$ 5.62	$ 62.66
2008	$ 32.25	$ 9.21	$ 3.65	$ 4.23	$ 3.81	$ 53.15
2009	$ 28.42	$ 8.17	$ 3.16	$ 3.82	$ 2.96	$ 46.53
2010	$ 26.02	$ 7.34	$ 2.86	$ 3.50	$ 2.48	$ 42.20
2011	$ 24.40	$ 6.84	$ 2.71	$ 3.34	$ 2.27	$ 39.56

Source: Sarasota County Property Appraiser's 2011 Annual Report

As of the time of this CIP document, very recent improvements in local unemployment rates, a net rise in in-migration, our more affordable housing prices, and other positive indicators point to a gradual improvement in the local economy.

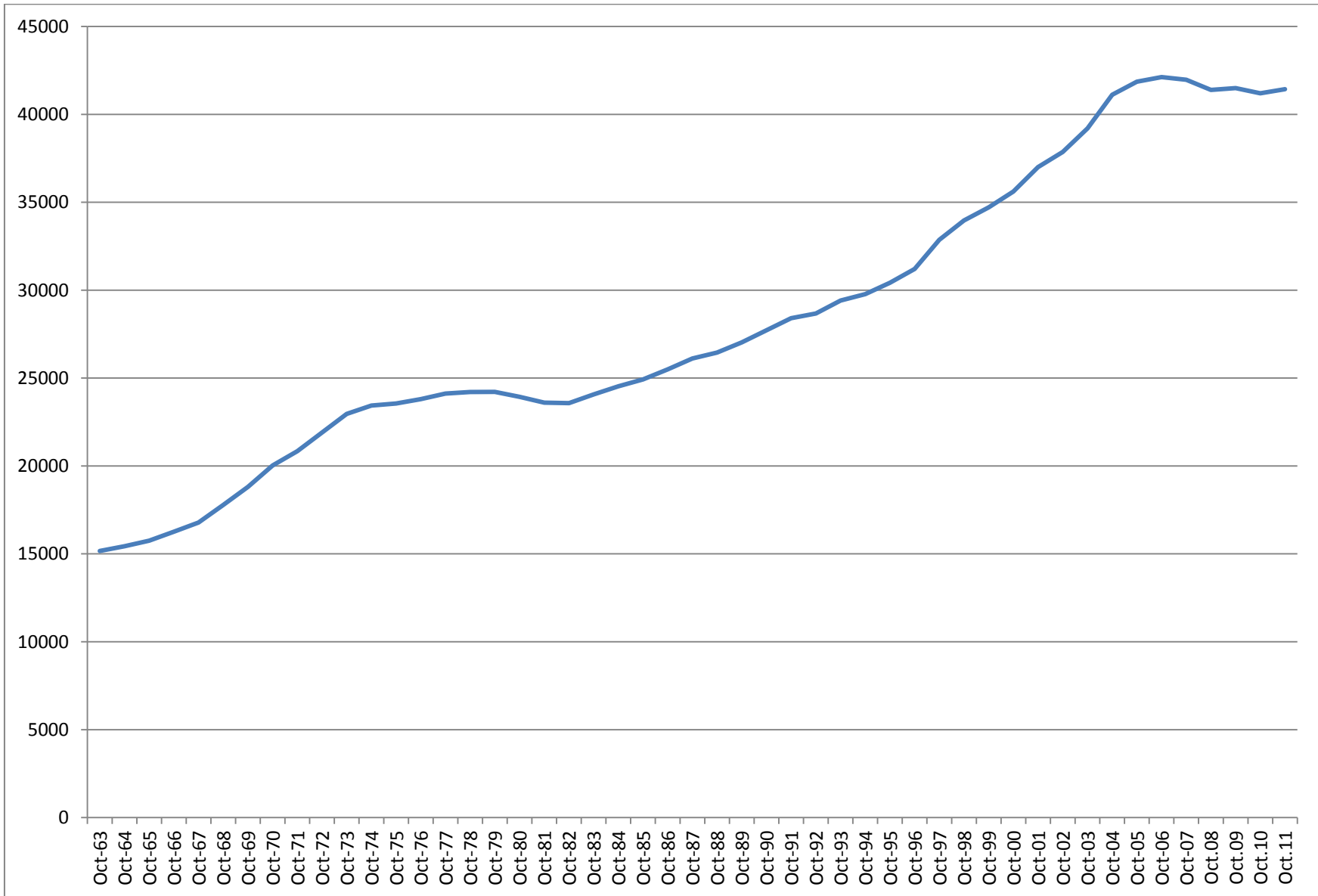**ENROLLMENT CONTEXT AND PROJECTIONS**

The district's Budget Office has the primary responsibility for determining, and submitting to the Florida Department of Education [DOE] each December, our official enrollment projections. Numerous departments and instructional administrators provide valuable input to this process. The Budget Office has a remarkable history of accurate projections, thereby making short- and mid-range capital planning much easier.

A special, state-derived enrollment projection called the Capital Outlay Full Time Equivalent [COFTE], has become increasingly important to our district's capital planning process. Essentially, COFTE represents the number of students which the district is obligated to house. COFTE is determined by subtracting charter school, virtual school, McKay scholarship, and other such students from the total enrollment. COFTE's importance will be explained later in this document.

Figures 1-11 through 1-18 illustrate actual and projected enrollment trends in Sarasota County Schools. A deeper analysis of enrollment patterns finds that:
- over 27% of students attend a public school other than their districted school; school choice, magnet programs, and charter schools offer options that many other districts do not provide
- enrollment in traditional schools is decreasing
- the district operates or contracts-out fewer alternative programs than just a few years ago

Figure 1-11 displays the district's total, actual enrollments since 1963. The most notable trend is a steady enrollment increase averaging almost 600 students per year, marred only by decreases in the mid-1970's and by a plateau from 2006 to the present.

Figure 1-11: Total Enrollments, 1963-2011

Figure 1-12 displays both actual enrollments by year from SY1999 through SY2011, and projections for the next five or ten years along four measures – total district enrollment, COFTE, the "district enrollment minus charter enrollment," and charter school enrollment. Note that the state's COFTE projections are predicated on a continuation of our history of authorizing a charter school every other year or so.

Figure 1-12
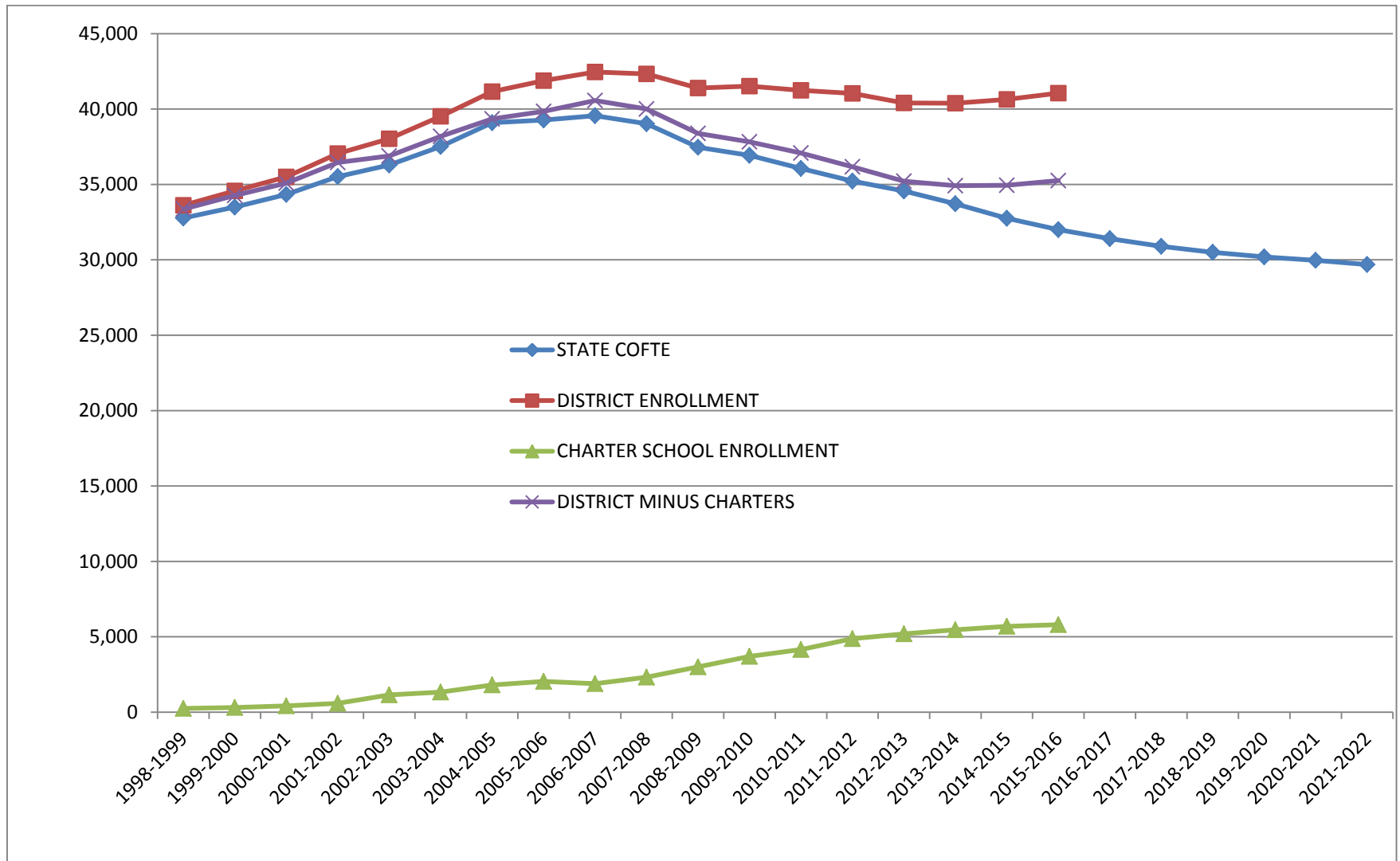
Figure 1-13 displays the SY2003 through 2012 <u>actual</u> and 2013 through 2017 <u>projected</u> total K-12 enrollment for the district. The enrollment in 2017 is expected to be 42,346, an increase of 807 from this current year. In contrast, in 2006 the district projected that the SY2017 enrollment would be over 53,000 students.

Enrollment in traditional elementary schools is displayed in Figure 1-14. This chart excludes alternative, special, and charter schools, and it assumes no additional charter schools. The district projects a decrease of about 500 traditional elementary students during this next planning cycle.

Figure 1-13: K-12 Enrollments

Source: SDSC Budget Office

Figure 1-14: Elementary School Enrollments
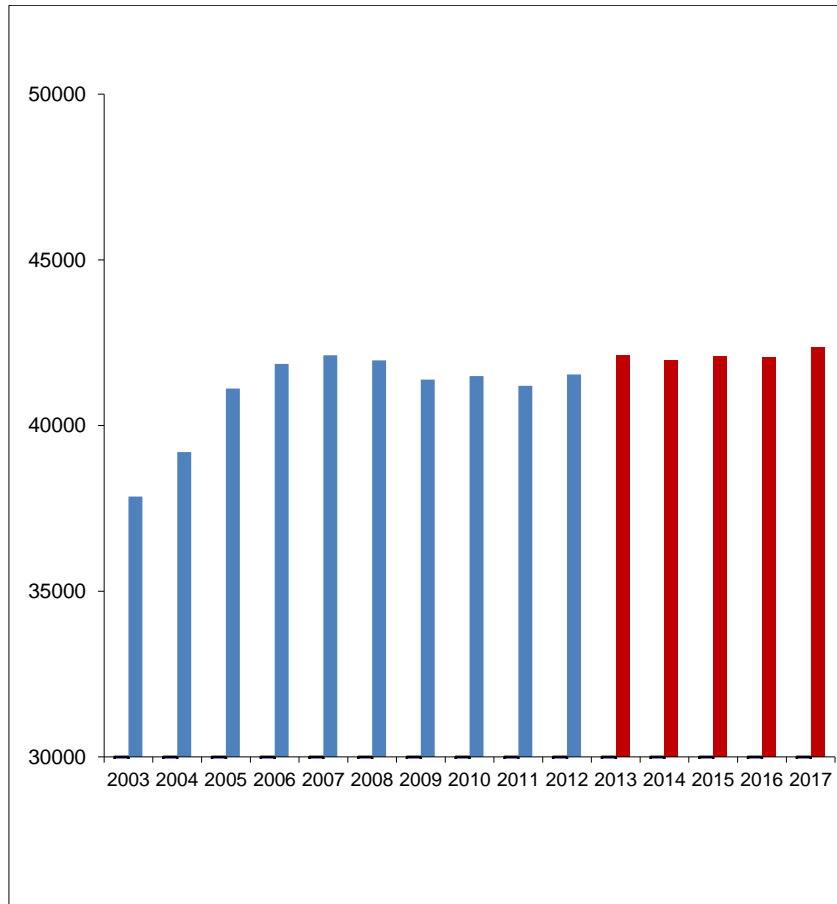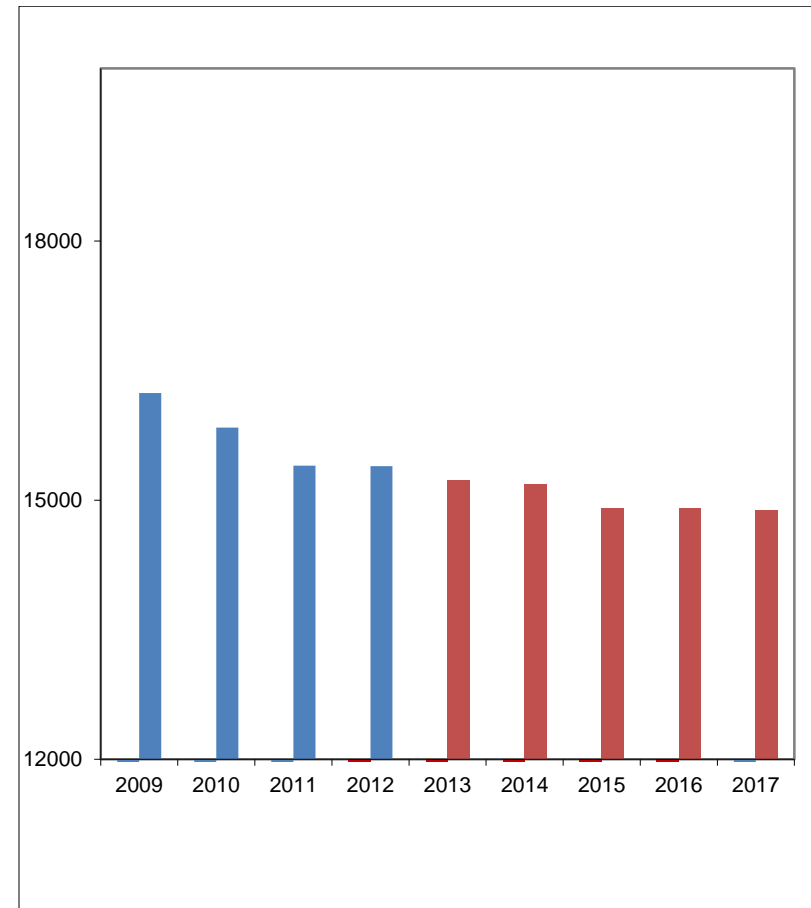
Source: SDSC Budget Office

Enrollment in traditional middle schools is displayed in Figure 1-15. The district projects a decrease of over 300 middle school students during this next planning cycle.

Figure 1-15: Middle School Enrollment

Enrollment in traditional high schools is displayed in Figure 1-16. The district projects a decrease of almost 500 high school students during this next planning cycle.

Figure 1-16: High School Enrollments

Enrollment in alternative, special, and other non-traditional schools is displayed in Figure 1-17. Such schools include Laurel Nokomis, Pine View, Oak Park, voucher students, and the emerging virtual schools. The district projects an increase of about 430 such students during this next planning cycle.

Figure 1-17: Other Enrollments

Enrollment in charter schools is displayed in Figure 1-18. The district projects an increase of about 1,550 charter school students during this next planning cycle. It is important to note that this increase is only for the currently existing charter schools, plus the State College of Florida charter high school to open August 2012; it does not include students who would attend charter schools yet to be approved.

Figure 1-18: Charter School Enrollments
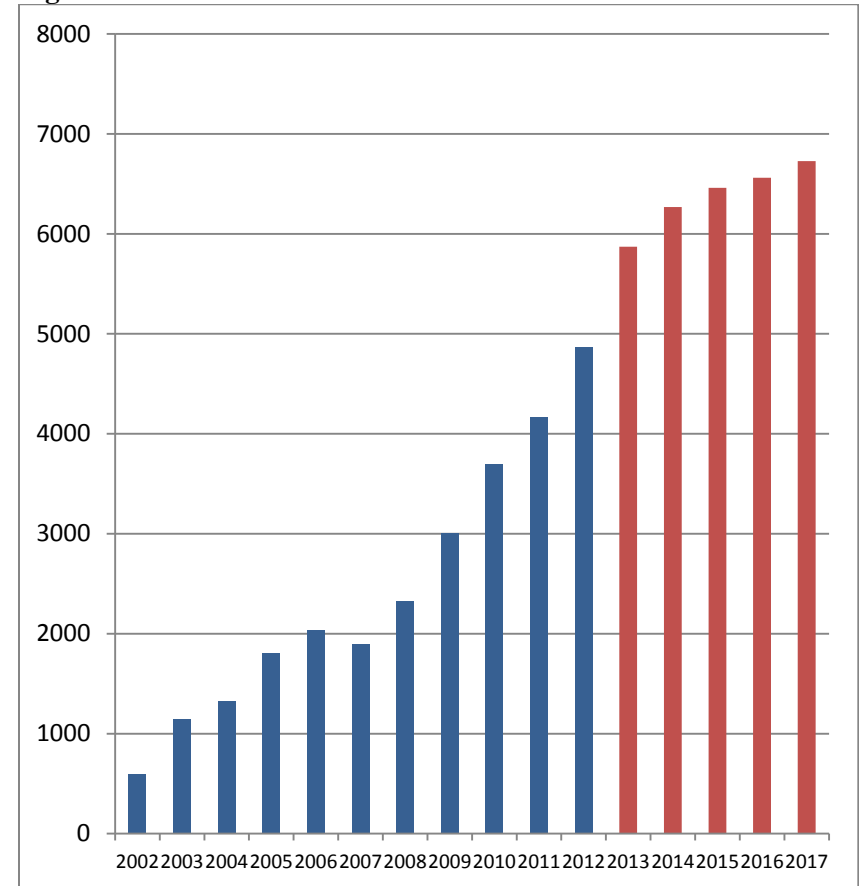
CAPITAL REVENUES

Reflecting the prior taxable value tables, the school district's capital revenues have varied significantly over the past ten years due to the decrease in taxable value. The table below, from November 0f 2011, displays that history and a projected increase of approximately 1-2% per year in local revenues at that time. Since then the Budget Office projects flat, or even slightly decreasing, capital revenues for the next few years.

Capital Budget Revenue

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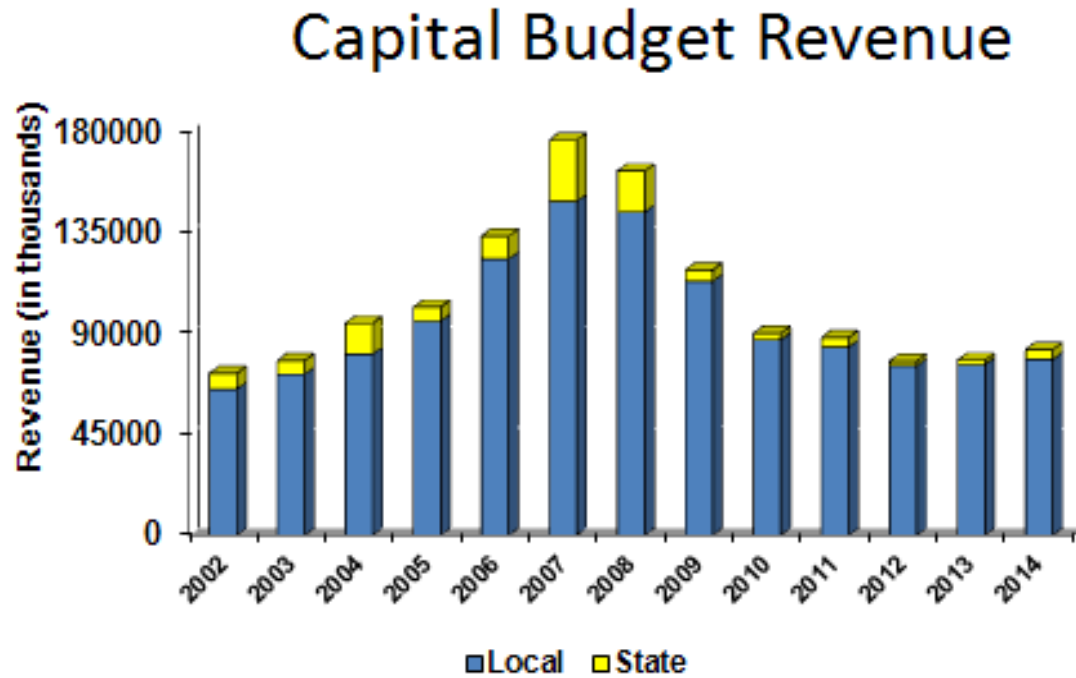
CHAPTER 2: PLANNING PROCESS AND COMPONENTS

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INTRODUCTION

This Capital Improvement Plan [CIP] provides a foundation for a systematic process to ensure that all students and staff are provided with the best facilities for learning and working, within available revenues. The major components of this process are outlined in the following table.

Major Components in the Annual Planning Process

- Develop/revise the 5-year enrollment projections by school, including updating programmatic information
- Update the program capacities for all facilities
- Develop a list of capital priorities based on established goals
- Develop capital and non-capital solutions to meet facility needs
- Filter the possible solutions against available revenues
- Adjust the Five-Year Capital Plan, as necessary
- Finalize the Capital Improvement Plan [CIP]
- Adopt the Capital Budget for following year, with contingencies for under- or over-budget scenarios

ENROLLMENT FORECASTING

Enrollment forecasting typically takes place from October through December each year. The process requires the analysis of multiple community factors including birthrates, demographic changes at the neighborhood level, local and regional housing trends, and local government land use policies. District factors such as attendance zone changes, program offerings, availability of school choice/reassignment options, No Child Left Behind options for AYP choice, charter school changes, and the impact of community perceptions may also be analyzed. Also, the SDCS Budget Office analyzes historical progression for every grade in every school, using cohort-survival methodology. Finally, the results are compared against local government, BEBR [Bureau of Economic and Business Research], and DOE projections.

The most difficult aspect of the forecasting process is to accurately project the number of kindergarten students district-wide and then by school. The number of births is a necessary but not sufficient factor in Sarasota County where there has been a high student in-migration for many years. Figure 2-1 displays the relationship between resident births and subsequent kindergarten enrollment five years later. Until the 2011 school year, the kindergarten enrollment was somewhat larger than the birth cohort. For the past two years, the number of public school kindergarteners has been less than the birth cohort, suggesting a change from in-migration to out-migration, at least of pre-kindergartners. Finally, the number of resident births has decreased sharply since 2006. Sarasota County's birthrate, always lower than the Florida average of about 12 births per 1,000 residents, hovered around 8.3 from 1997 until 2007, after which it has dropped to 7.2

Figure 2-1: Sarasota County Birth Cohort-to-Kindergarten
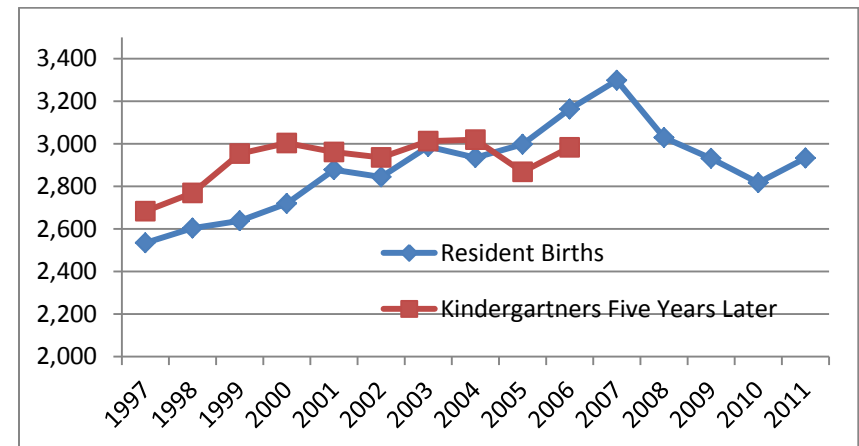
Source: SDSC Budget and Long Range Planning Offices; Florida Department of Health

Each December, the district submits the official projections, by program funding area, to DOE. To the extent feasible, the DOE forecast and the SDSC forecast are reconciled. In certain cases, the district may need to take advantage of a waiver process that includes statements from local governments documenting extraordinary residential developments. Eventually, the official DOE projection is established for use in budgeting and staffing. In the subsequent year, under-enrollment results in a payback to the state; over-enrollments at either the state of district level do not result in additional state revenues.

CAPACITY ANALYSIS

The district has developed a three-pronged capacity framework for use with various planning scenarios -- FISH capacity, Program capacity, and Ultimate capacity.

FISH Capacity -- The Florida Inventory of School Houses [FISH] Capacity is the "number of students that may be housed in a facility [school] at any given time based upon utilization of the number of student stations," based on FDOE formulas. Table 2-2 displays the FISH capacity for a typical SDSC elementary school.

Table 2-2: FDOE FISH Calculations

Spaces	Type	Design Capacity	DOE Student Stations
8	Kindergarten	18	144
24	Primary	18	432
13	Intermediate	22	286
2	ESE Part Time	15	30
2	ESE Full Time	10	20
2	ESE Resource	4	8
2	Supplemental	2	4
1	Music	30	30
1	Art	30	30
3	Skills Lab	22	22
1	PE	0	0
4	Resource	0	0
		Total Stations	1006

Source: SDSC Office of Long Range Planning

Because the FDOE utilization rate for elementary schools is 100%, the school capacity is the number of student stations. The district uses the FISH capacity for all official DOE reporting such as the Five-Year Tentative District Work Plan and the Educational Plant Survey. "FISH Permanent" capacity is the official capacity in the permanent structures, including the "concreteables" installed in 2003. "Total FISH" is the official capacity of a facility including the student stations in permanent and relocatable settings.

Program Capacity -- The district defines Program Capacity as the number of students that may be housed in a facility given the actual instructional programs and student demographics. Specifically, FISH and Program capacities differ in that Program calculations
- reflect each student's learning setting, not the capacity of a space, and
- reflect each school's particular offerings in which
  - the school may offer more Exceptional Student Education [ESE] programs than in FDOE's FISH capacity formulas
  - the school may offer more English for Speakers of Other Languages [ESOL], music, art, science labs, computer labs, and reading instruction spaces than the FDOE formulas.

Ultimate Capacity -- Essentially, this concept asks the question, "Given a school's program capacity, can its campus accommodate additional classrooms [whether permanent or relocatables] and the core facilities [cafeteria, clinic, parking, etc.] necessary to accommodate those additional students?" Accomplishing this task is integral to comprehensive planning for all schools. Relationships with the

community can be improved, budgeting for site improvements can be more efficient, and new additions and new schools can be justified more easily. The Ultimate capacity is determined as follows:

- begin with a school's Program capacity
- add students by considering these possible additions
  - relocatables -- the number that can be accommodated, given the distance between structures, set-backs, utilities
  - permanent classroom additions -- based on construction of one- or two-story buildings
- limit the additional students by considering these issues
  - the impact on the cafeteria -- kitchen, dining space, length of serving time
  - the impact on the size of the clinic
  - the impact on the space available to house any formula-driven staffing allocations -- ESE liaisons, guidance counselors, assistant principals, etc.
  - impact on traffic flow both off-site and on-site
  - storm water ponds
- finally, determine the extent to which the campus may be expanded by the purchase of neighboring property, and then repeat the same analysis of additions and limitations

Tables 2-3 through 2-6 are the 2011-12 facility planning sheets used to identify which schools (a) may have excess relocatables, (b) may have aging relocatables in need of demolition or replacement, (c) are over-utilized or under-utilized, (d) have an increasing enrollment projection that may stress their capacity, and (e) have a decreasing enrollment projection that may allow for demolition of certain relocatables or perhaps a redistricting to bring in more students. *Utilization* is calculated by dividing the enrollment by the Permanent Program Capacity.

Table 2-3: Elementary Facility Planning

	Oct. 2011 FTE	Perm. Student Stations	Reloc. Student Stations	Total Student Stations	Number of Reloc.	Number of Reloc. > 20 year old	DOE/ FISH Capac.	Perm Program Capacity	Percent Utilization	2017 Projection	Five-Year Trend	Projected Utilization
Alta Vista	575	753	214	967	11	0	967	633	91%	561	-14	89%
Ashton	807	734	254	988	14	3	988	617	131%	624	-183	101%
Atwater	705	1,028	0	1,028	0	0	1,028	864	82%	721	16	83%
Brentwood	651	1,043	0	1,043	0	0	1,043	876	74%	595	-56	68%
Cranberry	747	761	278	1,039	12	0	1,039	639	117%	701	-46	110%
E E Booker	513	738	144	882	11	3	882	620	83%	508	-5	82%
Englewood	429	644	54	698	4	0	698	541	79%	557	128	103%
Fruitville	748	736	280	1,016	17	0	1,016	618	121%	812	64	131%
Garden	576	482	269	751	19	0	751	405	142%	507	-69	125%
Glenallen	707	930	90	1,020	8	0	1,020	781	91%	726	19	93%
Gocio	783	602	542	1,144	29	16	1,144	506	155%	811	28	160%
Gulf Gate	767	913	0	913	0	0	913	767	100%	684	-83	89%
Lakeview	648	594	328	922	17	0	922	499	130%	611	-37	122%
Lamarque	946	1,069	361	1,430	18	0	1,430	898	105%	866	-80	96%
L. Nokomis	659	1,007	365	1,372	17	7	1,372	846	78%	655	-4	77%
Ph Shores	674	731	0	731	0	0	731	614	110%	636	-38	104%
Southside	724	826	25	851	3	0	851	694	104%	723	-1	104%
T Ridge	724	761	132	893	10	0	893	639	113%	659	-65	103%
T Ranch	680	781	276	1,057	15	1	1,057	656	104%	659	-21	100%
T Blade	652	853	134	987	8	1	987	717	91%	672	20	94%
Tuttle	661	849	72	921	5	1	921	713	93%	657	-4	92%
Venice	597	766	78	844	4	3	844	643	93%	576	-21	90%
Wilkinson	502	786	0	786	0	0	786	660	76%	440	-62	67%
TOTALS	15475	18,387	3,896	22,283	222	35	22,283	15445	100%	14,961	-514	97%

Source: SDSC Budget Office and the Office of Long Range Planning

Of note for elementary schools, few are projected to grow by more than 30 students:
- Englewood's growth should be manageable and is largely a result of the 2009 redistricting to move students from Taylor Ranch
- Fruitville's projected growth is not manageable as it is at its Ultimate Capacity; student assignment changes should be made to ensure this school does not outgrow its facility.

Many traditional elementary schools are projected to lose students:
- Brentwood's projected decline is disappointing given the 2007 redistricting to move students from Tatum Ridge
- The declines at Ashton, Cranberry, Garden, Lamarque, and Tatum Ridge may allow for the elimination of excess relocatables
- Because Gulf Gate and Wilkinson have no portables, their projected decreases will create empty permanent classrooms which could be filled with programs from other schools.

Table 2-4: Middle School Facility Planning

	Oct. 2011 FTE	Perm. Student Stations	Reloc. Student Stations	Total Student Stations	Number of Reloc.	Number of Reloc. >20 years old	DOE/ FISH Capac.	Perm Program Capacity	Percent Utilization	2017SY Projection	Five-Year Trend	Projected Utilization
Booker	845	2,014	0	2,014	1	1	1,813	1,668	51%	722	-123	43%
Brookside	898	1,649	0	1,649	0	0	1,484	1,365	66%	820	-78	60%
H Creek	1,052	1,735	140	1,875	8	1	1,688	1,437	73%	891	-161	62%
L. Nokomis	436	728	243	971	13	4	874	603	72%	437	1	72%
McIntosh	879	1,373	110	1,483	6	4	1,335	1,137	77%	862	-17	76%
Sarasota	1,149	1,477	154	1,631	9	9	1,468	1,223	94%	1,135	-14	93%
Venice	639	1,245	418	1,663	21	2	1,497	1,031	62%	473	-166	46%
Woodland	657	1,567	0	1,567	0	0	1,410	1,297	51%	901	244	69%
TOTALS	6,555	11,788	1,065	12,853	58	21	11,568	9,760	67%	6,241	-314	64%

Source: SDSC Budget Office and the Office of Long Range Planning

Almost all middle schools' utilizations are below 80% and most are projected to lose even more students:
- Booker Middle's poor utilization will actually allow for needed "swing space" during the 2012-16 major HVAC renovation; if nothing is done in the meantime to increase enrollment the concreteable [building 14] may need to be put to an alternative use
- Sarasota Middle is already the district's largest and should not be allowed to grow much more; its 2012-14 major HVAC renovation will improve utilization to allow the removal of all relocatables
- Laurel Nokomis is also undergoing an HVAC renovation which should enable the demolition of its aging relocatables by 2015
- The Board's recent decision to move approximately 200 students from Heron Creek to Woodland will equalize school enrollments, yet still leave their utilizations quite low [though everyone expects that North Port will be the initial growth area once in-migration resumes]
- Venice's permanent program capacity is so low partly because the facility also houses the Oak Park South special education program which uses many regular classrooms for small classes; regardless, this school is very under-utilized and, unless the new Young Marine program attracts more students or the nearby proposed Blackburn Creek residential project includes many families, most relocatables may be removed.
- It is very possible that by 2015 there will be no relocatables on traditional middle school campuses.

Table 2-5: High School Facility Planning

	Oct. 2011 FTE	Perm. Student Stations	Reloc. Student Stations	Total Student Stations	Number of Reloc.	Number of Reloc. >20 years old	DOE / FISH Capac.	Perm Program Capacity	Percent Utilization	2017SY Projection	Five-Year Trend	Projected Utilization
Booker	1,017	2,501	992	3,493	14	2	3,318	3,219	n/a *	1,012	-5	n/a *
North Port	2,334	2,924	50	2,974	2	0	2,825	2,741	85%	2,092	-242	76%
Riverview	2,640	2,841	0	2,841	3	3	2,699	2,618	101%	2,413	-227	92%
Sarasota	1,965	2,989	300	3,289	15	3	3,125	3,031	n/a *	2,013	48	n/a *
Venice	1,899	4,281	276	4,557	35	24	4,329	4,199	n/a *	1,831	-68	n/a *
TOTALS	9,855	15,536	1,618	17,154	69	32	16,296	15,807		9,361	-494	
these utilization rates are not computed while these large projects are underway.												

Source: SDSC Budget Office and the Office of Long Range Planning

Each high school has a unique facility issue not evident from the table:
- both Booker and Venice are mid-way through rebuilds of most of their facilities; all of the student station counts and capacities reflect the data prior to the construction plus numerous leased relocatables to temporarily replace the old classroom buildings to be demolished; when completed, neither school will have relocatables and their utilization rates will be significantly better
- North Port's previous enrollment declines were caused in part by the recession, and the projected sharp decline is based on the opening of the Imagine Charter High School and the upcoming opening of the Collegiate Charter at the Venice campus of the State College of Florida; both of its portables will be relocated
- Riverview's projected enrollment decrease should enable it to discontinue the use of some non-instructional spaces for classrooms; its Ultimate Capacity is also its Program Capacity, due to the secure design of this rebuilt school
- Sarasota has been the subject this year of a master plan designed to reduce surplus student stations, to fully utilize the Paul Rudolph building #4, to provide new cafeteria and gym spaces, to increase the security of the campus, and to provide an easily recognizable "front door." [NOTE: as of this date, the complete master design has not been finalized]. This projected enrollment increase can be accommodated within the renovation plans.

It is very possible that by 2015 there will be no relocatables on traditional high school campuses.

Table 2-6: Special and Non-Districted Schools

	Oct. 2011 FTE	Perm. Student Stations	Reloc. Student Stations	Total Student Stations	Number of Reloc.	Number of Reloc. >20 years old	DOE/ FISH Capac.	Perm Program Capacity	Percent Utilization	2017SY Projection	Five-Year Trend	Projected Utilization
Bay Haven	578	593	108	701	6	0	701	474	122%	581	3	122%
Oak Park	349	606	60	666	12	5	666	365	96%	356	7	98%
Phoenix	181	288	0	288	0	0	288	200	91%	180	-1	90%
Pine View	2,196	1,704	737	2,441	39	17	2,197	1,611	136%	2,250	54	140%
Suncoast	549	606	0	606	0	0	576	600	92%	558	9	93%
Triad	117	201	148	349	9	5	322	190	62%	111	-6	58%
TOTALS	3,970	3,998	1,053	5,051	66	27	4,750	3,440	115%	4,036	66	117%

Source: SDSC Budget Office and the Office of Long Range Planning

Each of these schools serves a unique population and none has an attendance zone. Pine View serves grades 2-12 gifted students. A task force recommendation to cap the school at 2,250 students was adopted by the Board a few years ago. The purpose of the cap is to prevent the school from further outgrowing its facilities. Regardless, this school has serious facility needs – for modern science labs, for an HVAC renovation, for replacement of many of its relocatables with a permanent classroom wing, and for larger core spaces [especially food service] – which will need to be addressed in the next few years. Suncoast Polytechnical is a new high school just now expanding to the 12th grade. The Triad school includes campuses in north and south county. No campuses of the Sarasota County Technical Institute are included as most students are post-secondary and there are no true capacity issues; nevertheless, the SCTI rebuild will conclude with the demolition of 39 aging portables.

The following table summarizes the prior four tables.

Table 2-6: Summary

	Oct. 2011 FTE	Perm. Student Stations	Reloc. Student Stations	Total Student Stations	Number of Reloc.	Number of Reloc. > 20 year old	DOE/ FISH Capac.	Perm Program Capacity	Percent Utilization	2017 Projection	Five-Year Trend	Projected Utilization
ELEM	15,475	18,387	3,896	22,283	222	35	22,283	15,445	100%	14,961	-514	97%
MS	6,555	11,788	1,065	12,853	58	21	11,568	9,760	67%	6,241	-314	64%
HS	9,855	15,536	1,618	17,154	69	32	16,296	15,807		9,361	-494	
SPECIAL	3,970	3,998	1,053	5,051	66	27	4,750	3,440	115%	4,036	66	117%
GRAND TOTAL	**35,855**	**49,709**	**7,632**	**57,341**	**415**	**115**	**54,897**	**44,453**		**34,599**	**-1256**	

Source: SDSC Budget Office and the Office of Long Range Planning

Since 2007 the district has utilized a Capital Projects Matrix to help prioritize large projects at schools and ancillary sites. Projects may be campus-wide, one entire building, or even one large room. The matrix contains measures of student capacity, prior capital investments, pending maintenance, utilities, condition assessment, and security. Each project receives a 1-5 rating for each measure according to the Legend; the measures are weighted based on the Board's priorities. The matrix is completed each January and is used throughout each year's capital budget planning.

The 2012 Matrix is provided below, with all projects ranked. Projects highlighted in green are already in process; projects in blue are HVAC projects which essentially compete against each other for funding in that line item in the budget.

School	Signif Capacity Needs	Duration of Over-Capacity	Age of Reloc	Projected 5-Year Core Status	Cost of Maint. Projects Pending	Utility Costs	Past Five Years' Capital Invest	Facility Condition Index	Security CPTED Analysis	Total	2011 Total	2013-2017 Capital Plan, etc.
weight	1	1	1	3	5	2	2	4	5			
Sarasota HS west	1	0	2	0	25	4	10	16	25	*83*	74	Master Plan incl. gym, cafeteria, site
Pine View	3	3	4	12	20	2	6	12	20	*82*	75	HVAC, classroom wing, science, core spaces
Sarasota HS Bldg 42	n/a	n/a	n/a	n/a	15	4	10	20	25	*74*	76	minor renovations for "swing space"
Sarasota HS Bldg 5	n/a	n/a	n/a	n/a	15	4	10	20	25	*74*	76	planned for demolition 2013
Bay Haven	1	2	0	6	15	8	8	8	25	*73*	60	
Bay Haven Cafeteria	n/a	n/a	n/a	n/a	10	8	8	20	25	*71*	69	
Sarasota HS Bldg 4	n/a	n/a	n/a	n/a	15	4	10	16	25	*70*	72	$12 million for renovation 2012-13
Bay Haven Bldg 4	n/a	n/a	n/a	n/a	5	8	8	20	25	*66*	69	minor renovation funded summer 2012
Gocio	5	5	5	15	0	6	6	4	20	*66*	57	portable reduction/replacement summer 2012
Booker MS	0	0	0	0	15	4	8	16	20	*63*	54	$12 m HVAC 2012-2016
SCTI-Ag	n/a	n/a	5	0	0	2	10	20	25	*62*	62	
Sarasota MS	1	0	5	0	15	4	8	12	15	*60*	60	$10m HVAC 2012-14
Laurel Nokomis	3	0	3	0	15	4	6	8	15	*54*	56	$10m HVAC funded in 2010-11
Booker HS	4	0	1	0	25	2	0	20	n/a	*52*	80	rebuild 2010-14
Garden	3	5	0	9	0	4	8	8	10	*47*	53	
Fruitville	2	5	0	9	0	8	8	4	10	*46*	34	ice storage funded 2011-12
Lakeview	3	5	1	9	0	8	2	0	10	*38*	45	
Taylor Ranch	2	5	1	3	0	6	6	0	15	*38*	25	
Venice MS	2	0	1	0	5	2	8	8	10	*36*	31	analyze OPS space needs, Bldg 5 remodel
E E Booker	2	0	2	0	0	4	8	4	15	*35*	28	
Fruitville Bldg 3	n/a	n/a	n/a	n/a	0	8	8	4	15	*35*	20	$120,000 needed to complete
Oak Park	2	0	4	0	0	8	6	0	15	*35*	32	
Sarasota HS east	0	0	0	0	0	4	2	4	25	*35*	61	Master Plan incl. gym, cafeteria, site
Alta Vista	2	0	0	0	0	6	8	12	5	*33*	37	
SCTI-Fire Academy	n/a	n/a	3	0	0	0	10	0	20	*33*	33	Office and Locker spaces unfunded
Ashton	2	5	2	3	0	6	8	0	5	*31*	49	
Venice HS	2	0	5	0	0	4	0	20	0	*31*	74	rebuild 2010-15

27

School	Signif Capacity Needs	Duration of Over-Capacity	Age of Reloc	Projected 5-Year Core Status	Cost of Maint. Projects Pending	Utility Costs	Past Five Years' Capital Invest	Facility Condition Index	Security CPTED Analysis	Total	2011 Total	2013-2017 Capital Plan, etc.
weight	1	1	1	3	5	2	2	4	5			
Englewood	1	0	0	3	0	4	8	8	5	29	26	
SCTI-South	5	0	3	0	0	1	0	0	20	29	n/a	
Brentwood Media	n/a	n/a	n/a	n/a	0	2	6	8	10	26	16	
Brentwood	0	0	0	0	0	2	6	8	10	26	31	
McIntosh	1	0	5	0	5	2	8	0	5	26	21	
Toledo Blade	1	0	1	0	0	2	4	0	15	23	27	
Brentwood Cafeteria	n/a	n/a	n/a	n/a	0	2	6	4	10	22	12	
Brookside	0	0	0	0	0	4	8	0	10	22	22	
North Port HS	0	0	0	0	0	6	6	0	10	22	20	
Cranberry	2	3	0	6	0	2	8	0	0	21	23	
TRIAD	0	0	0	0	0	6	10	0	5	21	21	
Heron Creek	1	0	1	0	0	4	8	0	5	19	19	
Venice El	1	0	5	0	0	2	10	0	0	18	19	
Gulf Gate	0	0	0	0	0	2	8	0	5	15	18	
Lamarque	2	2	0	3	0	4	4	0	0	15	12	
Phillippi Shores	0	0	0	3	0	2	10	0	0	15	13	
SCTI-Main	4	n/a	5	0	0	6	0	0	0	15	60	rebuild 2007-14
Tuttle	1	0	2	0	0	4	8	0	0	15	13	
Phoenix	0	0	0	0	0	4	10	0	0	14	18	
Tatum Ridge	1	2	0	3	0	2	6	0	0	14	18	
Wilkinson	0	0	0	0	0	6	8	0	0	14	10	
Glenallen	1	0	0	0	0	4	2	0	5	12	10	
Southside	0	0	0	3	0	2	0	0	0	5	8	
Suncoast Poly HS	0	0	0	0	0	5	0	0	0	5	10	
Riverview HS	0	0	0	0	0	4	0	0	0	4	12	
Woodland MS	0	0	0	0	0	2	0	0	0	2	2	
Atwater	0	0	0	0	0	0	0	0	0	0	0	

Source: SDSC Office of Long Range Planning, Facilities Services Department, Safety& Security Department

Summary and Conclusions from Chapters One and Two

1. The ILA is working well for data sharing, site selection, and joint-use opportunities.
2. School Concurrency has had no compliance issues for the very few developments proposed.
3. Other than the Villages of Lakewood Ranch South, large-scale residential development has stagnated.
4. Demographically, Sarasota County continues to have a very high percentage of citizens over age 65. The birth rate is one of the lowest in the state.
5. The local economy – historically buoyed by the residential construction industry and tourism – has been shaken hard by the recession. Local unemployment rates have been uncharacteristically higher than state and national figures. Nearly half our students are eligible for Free or Reduced prices meals.
6. Total school enrollment has been relatively flat for a few years – just the second such occurrence in the past 40 years. The district has long valued a variety of public school choice options; currently, about 27% of students attend a school outside their attendance zone.
7. COFTE and district projections portray a trend in which even fewer students will attend traditional public schools, and instead choose undistricted, charter, or virtual school settings. Charter enrollment now accounts for about 12% of total enrollment, and is expected to rise.
8. Recently, there has been a change to a net out-migration, at least for pre-K students, as Kindergarten enrollment is now less than the number of births five years prior.
9. No growth-related schools will be needed for at least the next five years.
10. For now, the district is under no enrollment pressure to acquire future school sites. Low land prices and a carry-forward of School Impact Fee revenues, however, encourage acquisitions now.
11. The district now has the opportunity to significantly reduce its reliance on relocatable classrooms. Implementing a multi-strategy plan may result in no such units at middle and high schools within a few years, and an increase in elementary schools without relocatables.
12. The conditions of schools and campuses have improved greatly in the past 20 years. Many schools have been rebuilt and a few have had major renovations including HVAC systems.
13. Schools' educational adequacy has been maintained by updating our Educational Specifications and design standards, plus an aggressive Technology Plan including Active Boards and a five-year computer refresh cycle. Now, "Classrooms of Tomorrow" and TEAL labs are being proposed to provide our teachers and students with the types of settings they will utilize at the post-secondary level.
14. School safety and security have been greatly enhanced by the safer designs of newer schools. , expanded perimeter fencing, and increased security cameras.
15. Capital revenues continue to fall. Little new development has come onto the tax rolls and most properties have lost significant value in the past few years. The state has also reduced the capital millage by 25% and the School Board has placed a two-year moratorium on the collection of School Impact Fees.
16. Debt service, recurring capital expenditures, and the cost of the current construction projects [including the plans for Sarasota High School] leave little funds for new or competing projects for the next 2-4 years.
17. The Capital Projects Team will continue to prioritize and fund small and mid-range projects.
18. The schools next in need of major projects include Pine View [science labs; HVAC; core campus; replacement of relocatables] and Bay Haven [cafeteria; media; replacement of relocatables].

Chapter 3: GOALS, STRATEGIES, AND RECOMMENDATIONS

INTRODUCTION

This chapter continues the capital planning process, organized around four goals which reflect the data from the first two chapters.

Goal 1: Ensure the most efficient and effective use of all facilities by implementing an integrated system of school rebuilds, relocatable reduction, and attendance zone and program changes.

Goal 2: Maintain, renovate, or replace the facilities most in need on a systematic schedule to guarantee safe, up-to-date facilities that meet diverse program needs.

Goal 3: Implement the current Instructional Technology Plan to ensure that all students and teachers have access to the latest educational technology.

Goal 4: Provide for the systematic replacement of equipment and materials.

The following narrative includes all of the non-salary capital projects which implement each goal. The schools and ancillary sites specified below reflect the April 2012 decisions for projects to be completed during the 2013 SY; emergencies, funding, and other issues may change the projects actually completed.

Goal 1: Ensure the most efficient and effective use of all facilities by implementing an integrated system of school rebuilds, relocatable reduction, and attendance zone and program changes.

To carry out this goal, the Plan incorporates the following strategies:
1. Rebuild aging structures for which a definitive use remains; demolish aging structures no longer needed
2. Replace aging, excess relocatables with newer units; demolish or sell other excessive units
3. Maximize facility utilization through program relocations, attendance zone changes, or student assignment measures
4. Incorporate long-term planning for instructional programs
5. Review articulation agreements with Manatee and Charlotte County Schools
6. Purchase new sites necessary to support long-range needs, as long as land prices remain low.

Strategy 1 -- Rebuild aging structures for which a definitive use remains; demolish aging structures no longer needed

The plan calls for the implementation of the Sarasota High Master Plan including the renovation of the Paul Rudolph building #4, establishment of a new cafeteria and a new gym, and the demolition of structures beyond their useful life. The completion of the rebuilds at SCTI, Booker High, and Venice High will result in the demolition of numerous old permanent and relocatable structures.

To implement this strategy, the 2012-17 Capital Budget includes these projects:

- ❖ Booker High Rebuild [Projects 3085 and 3086] – the 2011-12 budget includes the entire project allocation. This rebuild will be completed by the spring of 2014.

- ❖ Sarasota High Rebuild [Project 3055] – the 2011-12 budget partially funds the project. Staff will recommend funding the remaining work in the 2012-13 budget. The architectural and construction firms will be selected this spring. If authorized, the work will begin this summer and be completed by the 2015-16 SY.

- ❖ Venice High Rebuild [Project 3225] – the 2011-12 budget includes the entire project allocation. This rebuild will be completed by late winter 2014.

- ❖ SCTI Renovations Phase III [Project 3393] – the 2011-12 budget includes the entire project allocation. This rebuild of the Adult and Community Education spaces and the service labs will be completed by the winter of 2014. The final work will include construction of the Riverview HS baseball and softball fields.

Strategy 2: Replace aging, excess relocatables with newer units; demolish or sell other excessive units

During the rapid enrollment growth of the 1980's and 1990's, the district opened new schools and classrooms wings, and also constructed or bought hundreds of relocatables. As recently as 2005 the district had 649 instructional portables providing 12,802 student stations. At one point, analysis revealed that our district had the state's second highest percentage of relocatable student stations when compared to permanent student stations. Gradually, many of the oldest units have been replaced with permanent classrooms or have been demolished when no longer needed. There are now 487 relocatables at schools, a decrease of 162 since 2005.

Now that the district's COFTE enrollment has leveled off, and with decreasing COFTE projections, the district is in a position to replace

scores of aging, excess units. Table 3-1 displays the schools with the most portables and units which have been declared "failed standard" by DOE. Note that 65 older units at SCTI, Booker High, and Venice High have already been removed from inventory [on paper] in preparation for their demolition by 2013 and so are not listed below.

Table 3-1: Schools with Excessive and Aging Relocatables

School	Number of Relocatables	Number of Failed Standard Units
Ashton Elem	15	4
Emma E Booker Elem	11	3
Gocio Elem	29	16
Laurel Nokomis	29	11
McIntosh Middle	6	4
Oak Park	12	5
Pine View	39	17
Sarasota Middle	9	9
SCTI-South	10	7

Source: SDSC Office of Long Range Planning

To implement this strategy, the 2013-17 Capital Budget includes this project:

- ❖ District-Wide Portables Demolition [Project 3425] – the unencumbered balance in the 2011-12 capital budget will pay for this summer's replacement of all 16 of Gocio's aging units; also this summer, numerous aging units will be relocated, repurposed, or demolished at various campuses, including the Fire Science Academy. Allocations in future years will continue this process, contributing to significant decreases in utility and repair costs.

Strategy 3: Maximize facility utilization through program relocations, attendance zone changes, or student assignment measures

During this time of decreasing enrollments and decreasing revenues, maximizing the utilization of all facilities is paramount. The determination as to which special programs will be in all schools, regional, or district-wide is critical to effective long-range planning. It is recommended that the district develop and adopt long-range facility plans for these program areas:

        Career-Technical Programs
        Exceptional Student Education
        Alternative Programs
        Preschool Programs
        Magnet Programs

The plan should identify where programs are located, how many students are served, expectations for future growth, and special facility needs. Likewise, opening or closing schools to School Choice can effect subtle enrollment changes over time, in a way which allows parents the option to move students from one school to another, rather than by redistricting.

The plan also calls for a continuous effort to identify attendance zone changes when program relocations and student assignment measures are not plausible. Early in 2012 the School Board adopted a Boundary Advisory Committee recommendation to move about 200 middle school students from Heron Creek to Woodland; doing so will equalize the budgets and staffing for the North Port middle schools and increase the efficiency of both facilities. School Choice and Reassignment options will continue to be controlled in a coordinated, efficient way.

Finally, a new procedure to report and track classroom utilization will be implemented this summer.

There are no capital budget projects for this strategy.

Strategy 4: Incorporate long-term planning for instructional programs

In 2008, the Board adopted Policy 7.78 requiring a bi-annual re-adoption of Educational Specifications for elementary, middle, and high schools as a way to ensure that upcoming construction projects reflected the district's intent for the best, standardized, technologically-appropriate, facilities affordable. The next update will occur late in the 2011-12 SY. In addition, the on-going updates to the Facility Condition Assessment will help evaluate the extent to which each school facility meets the expectations in the Ed Specs. Prime examples of this task will be an analysis of middle and high school science facilities, plus an analysis of how best to assure the most proper spaces for the increasing number of local and state computer-based assessments.

The plan also encourages the application of long-range planning tools such as Archibus® to model various scenarios for the implementation of educational initiatives as determined by the Board or Florida Legislature. Examples during the past few years have included the grant-supported remodelings for elementary and middle school science labs; the need for elementary Physical Education instructional spaces; and assessment labs K-12.

There are no capital budget projects for this strategy.

Strategy 5: Review articulation agreements with Manatee and Charlotte districts

For many years, discussions with neighboring districts have explored the issue of shared use of schools. For decades the Board has had a bi-county agreement with Charlotte County Schools by which students in the greater Englewood area use Englewood Elementary [Sarasota], L. A. Ainger Middle [Charlotte], and Lemon Bay High [Charlotte] as their districted schools. The plan calls for an annual review of the short- and long-term implications relative to space utilization and operational costs.

There are no capital budget projects for this strategy.

Strategy 6: Purchase new sites necessary to support long-range needs, as long as land prices remain low.

From the 1990's until about 2006, the district's acquisition of school sites was often completed under pressure to construct a new school, such that the purchase prices were high. Since then, the Board has authorized site acquisitions for schools planned for the next 5-20 years, utilizing School Impact Fees [SIF] and taking advantage of lower land prices. Purchasing North Port sites early is critical as the district must typically acquire scores of contiguous, residentially zoned parcels. The following table displays the inventory of future school sites.

Table 3.2: Inventory of Future School Sites

SITE	LOCATION	SIZE
Elementary	Panacea Blvd., North Port	47 acres
Elementary	Haberland Blvd., North Port	25 acres
Middle	Largo Preserve, North Port	51 acres
High	Panacea Blvd., North Port	104 acres

Source: SDSC Office of Long Range Planning

The plan continues the use of SIF allocations to acquire school and ancillary sites for future growth. Possible acquisitions are listed in Table 3-2.

Table 3-2: Facility Sites Needed for Next Ten Years

Facility	Approximate Site	Suggested Purchase Year
South County Fleet	North Port	2012
Eighth Elementary	North Port	2012
North County High	Near a Village	2013
North County Middle	Near a Village	2013

Source: SDSC Office of Long Range Planning

To implement this strategy, the 2012-17 Capital Budget includes this project:

❖ Land Purchases [Project 5660] – the 2011-12 budget represents the carry-forward of SIF revenues, and the encumbrances represent the costs associated with the acquisition of the "Haberland" future elementary school site. The remaining carry-forward will be used to fund the next acquisition. Staff is currently negotiating the acquisition for a bus fleet depot in North Port; this depot will save considerable general fund dollars by reducing deadhead miles. The projected decreased revenues after 2012 reveal the impact of the moratorium on the collection of school impact fees, now scheduled to sunset December 2012.

Goal 2: Maintain, renovate, or replace the facilities most in need on a systematic schedule to guarantee safe, up-to-date facilities that meet diverse program needs.

Beginning in 2005 the district invested approximately $2 million into a project to modernize the data collection and processing for all our facilities. We:

- converted approximately 3 million square feet of facility drawings into a CAD-like version;
- identified all firewalls and site utilities;
- inventoried and tagged approximately 5,000 major pieces of equipment;
- linked the facility drawings and equipment inventory with the Archibus® facility management system; and,
- conducted a Facility Condition Assessment of the then 7.1 million GSF at 53 sites owned or operated by the district.

The initial aggregate district Facility Condition Index was 10.54, indicating that the cumulative repair of deficiencies and replacement of building systems was approximately 10 percent of the value of the

district's facilities. Industry experts have shared that an index of 10% reflects an outstanding maintenance program and the timely replacement of major building systems. Since then, all new facilities have been entered into the Archibus database.

To carry out Goal 2, staff in the Maintenance, Construction, and Planning offices:

- incorporate the results into the CIP process and the Capital Projects Matrix
- utilize the facility work order system that is linked to Archibus®
- add new facilities to all data bases, and
- continue to utilize the Castaldi formula to help determine the cost-effectiveness of renovating, remodeling, or rebuilding aging facilities.

Future plans call for us to utilize the space utilization and capital planning modules in Archibus.

The Plan also utilizes the Facility Condition Assessment [FCA] data and incorporates these strategies:

- implementing a preventative maintenance schedule for each facility, addressing the following projects:
  - o roof replacement
  - o flooring replacement
  - o fire and life safety systems
  - o major systems replacement
  - o playground replacement
  - o relocatables maintenance
  - o traffic improvements including resurfacing, expansion, on-site queuing
- implementing the Capital Projects requires a team of construction, facility, technology, telecom, and instructional leaders to systematically:
  - o develop a list of small [i.e., less than $50,000] instructional safety projects, by site
  - o rank the requests as to priority

- o ensure adequate funding for as many as possible
- addressing local, state, and federal programs, and other issues including:
  - o Americans with Disabilities Act
  - o gender equity
  - o health clinic standards
- adopting specifications for safety and security at all new schools and implementing a five-year safety and security plan for existing schools that includes:
  - o fencing of schools, beginning with those most vulnerable to intrusion
  - o erecting vehicle standoff barriers
  - o integrating appropriate locking systems
  - o placing cameras in strategic sites on campuses and other facilities
  - o fully installing the Raptor® system
- performing FCA modeling of various capital investment plans
- continuing the efficiency of Facilities zone teams
- increasing the collaboration of the Facilities, Construction, and Long-Range Planning offices.

To implement Goal 2, the 2013-17 Capital Budget includes these projects:

❖ Small Projects [Project 5540] – the Capital Projects Team authorizes capital improvements that
  ➢ cannot be funded by any department's maintenance and repair budget
  ➢ are consistent with Educational Specifications, and
  ➢ cost less than $50,000.
Most of the remaining 2012SY funds will be allocated for projects to be completed this summer at numerous sites.

❖ District-Wide Environmental Health & Safety [Project 4516] – for outside vendors to provide indoor air quality assessments, storm water pond cleaning, etc.

❖ District-Wide HVAC [Project 4517] – this project is used to fund maintenance repair and replacement of HVAC systems and equipment across the district. Projects scheduled for this year include: $2 million for Booker MS; $200,000 for Fruitville energy storage and several coil replacements across the district.

❖ District-Wide Playgrounds [Project 3675] – this line item funds the replacement of existing playgrounds, as necessary. For additional or program-related playgrounds, schools seek funding from the Capital Projects Team via the "Small Projects" account.

❖ District-Wide Radon [Project 4524] –this funding stream is utilized to conduct the mandatory radon testing required in the district.

❖ District-Wide Reroofing [Project 4562] –this funding is utilized to maintain all roofing district wide. Each roof in the district has been surveyed over the last few years. This survey assisted us in developing a preventative maintenance plan which focuses on extending roofing life cycles and decreasing long term costs within the district. For example in many areas we have been able to replace only the cap sheet on a roof with a reflective cap sheet. This has allowed us to extend the manufacturer's warranty and obtain a rebate on the installation from FPL due to an increase in the energy performance profile of the roof system. This has also helped us decrease our cost of energy in those buildings.

❖ District-Wide Painting [Project 4573] – this funding is based on a 10 year life cycle for paint. However we have reduced this project by approximately 40% over the next few years to provide funding for the Booker MS renovations.

❖ District-Wide Fire Alarm [Project 4576] – this funding stream is utilized to repair and upgrade life safety systems throughout the district.

❖ District-Wide Flooring [Project 4673] - this funding stream is based on a ten year life cycle for flooring. However over the next few years we have decreased the amount we will spend on flooring by 40% to fund the Booker MS renovations.

❖ District-Wide Asbestos Removal [Project 5541]-this line item is used to remove and abate any asbestos in schools.

❖ Instructional/District Remodel Projects [Project 5542]-this line item is used to fund renovations to building spaces. These renovations are driven by age of buildings, condition of systems, building FCI scores, and on site evaluations. The funding has been decreased over the next few years to fund the Booker MS renovation project.

❖ ADA Corrections [Project 5557] - this funding is utilized to correct any accessibility issues which arise in our facilities. For example we just completed a renovation on the Bay Haven stage to provide access to a wheelchair bound student who would need to access the stage for the graduation ceremony.

❖ District-Wide Improvements [Project 5604] – this line item is used to fund maintenance and improvements to all areas on our campuses outside of the buildings i.e.: parking lots, sidewalks, drainage structures, wetlands.

❖ Facilities Services Preservation of Asset Value [Project 9901] - this is the line item used to budget large exterior paint and stucco projects within the district.

❖ Bay Haven Café/Art/Music [Project 3071] – $230,000 this summer will be used to renovate building 4's cafeteria and music spaces.

❖ Fruitville HVAC [Project 3131] – this line funds the construction of a thermal storage unit, in order to save operational dollars.

❖ Booker Middle HVAC [Project] – this project renovates all permanent buildings, provides a new HVAC system, and will be completed by winter 2014.

❖ Sarasota Middle HVAC [Project 4031] – this project renovates all permanent buildings, provides a new HVAC system, and will be completed by winter 2013.

❖ Laurel Nokomis HVAC Renovations [Project 4516] – this project renovates all permanent buildings, provides a new HVAC system, and will be completed by winter 2013.

❖ Landings Asset Preservation [Project 3619] – this project is used to update systems within the landings building complex. Most recently all HVAC equipment within the buildings was update and replaced. Next steps include parking lot renovations and carpet and paint in most of the facility.

The following new projects are being proposed for funding in 2012-13, unless otherwise noted:

❖ Classrooms of Tomorrow and TEAL Labs [Project TBD] – the Capital Projects Team is recommending a 2012-13 SY investment of up to $250,000 to renovate 25 middle school math and science rooms to our "Classrooms of Tomorrow" specifications, and to renovate one space in each high school to our "TEAL Lab" specifications; this project would be completed by this August.

❖ Garden Elementary Covered Walkway at Drop-Off/Pick-Up [Project TBD] -- the Capital Projects Team is recommending a 2012-13 SY investment of $48,000 to correct an unsafe situation at this campus.

❖ North Port High School Athletics Lockers [Project TBD] -- the Capital Projects Team is recommending a 2012-13 SY investment not to exceed $100,000 to correct an unsafe situation for student athletes.

Goal 3: Implement the current Instructional Technology Plan to ensure that all students and teachers have access to the latest educational technology.

To carry out this goal, the Plan incorporates these strategies:
- School applications including
  o classroom technologies
  o educational assessment tools
  o school websites
  o internet texts & learning tools
  o student information system and gradebook
- District applications including
  o management reporting systems
  o financial systems/payroll
  o food service management systems
- Community applications including
  o workforce collaboration tools
  o management tools [Archibus, strategic planning]
  o constituent communication tools
  o hardened data/operations center
  o fiber optics network.

To implement Goal 3, the 2013-17 Capital Budget includes these projects for 2012-13 SY:

❖ Computer Replenishment Program, HP Leases (Projects 4680, 4681, 4682, 4683) Funded through Debt Service, and currently in year 4 the HP lease program provides an equitable model and computer platform to all schools in the district.

36

- ❖ District-Wide Communications Support [Project 3560] – This includes necessary replacement and infrastructure necessary in support of district-wide communications including intercoms, clocks and telephones.

- ❖ Local Area Network (LAN) Support [Project 4569] – This includes necessary infrastructure replacements to support our local area networks. Each year, specific schools network infrastructures are upgraded to replace out of date equipment.

- ❖ Computing Infrastructure [Project 4605] – Includes replacements and upgrades necessary to support blades, school servers and television studios.

- ❖ TERMS Replacement / Upgrade [Project 4606] – Includes funding necessary to complete the implementation of CrossPointe.net for Finance, Human Resources, Payroll, Student, Gradebook and Parent and Employee Portals

- ❖ Classroom Instructional Technologies [Project 3019] – includes funding necessary for the replacement cycles of projectors and interactive whiteboards, student response devices, voice enhancement systems, document cameras and interactive teaching peripherals

- ❖ District Instructional Technologies [Project 3072] – Includes funding necessary to support our learning management systems, virtual learning, streaming video, video conferencing, individualized learning system, and reading progress monitoring

The following new projects are being proposed for funding in the next five-year cycle, unless otherwise noted:

- ❖ Scoreboard Replacements (Project TBD) – Includes funding necessary to replace scoreboards at school sites

- ❖ PD System Replacement (Project TBD) – Includes funding necessary for the purchase and implementation of a Professional Development System to replace aged technology

- ❖ Digital Devices (Project TBD) – Includes funding necessary to support and explore options regarding Digital Devices in the classroom

- ❖ Comcast Replenishment – In an out year, includes funding necessary to support a possible switch over to another service provider at the conclusion of our current agreement

Goal 4: Provide for the systematic replacement of equipment and materials.

To carry out this goal, the Plan incorporates these strategies:
- implementing the state's plan to replace many bound textbooks with digital books
- systematically replacing library books, as necessary given the increasing preferability of some for digital books
- continuing the 13-year replacement cycle on buses
- continuing the use of superior purchasing practices
- analyzing the expansion, replication, or shared use of support facilities such as warehouses, parts inventory, ITV, print shop, similar services

To implement Goal 4, the 2013-17 Capital Budget includes these projects:

- ❖ District-Wide Vehicle Replacement [Project 3016] – for many years this line item averaged $1.1 million annually. Restrictions on the use of the "white fleet" were implemented in 2010, and the allocation is now less than $500,000 per year.

❖ School Bus Replacement [Project 3026] – Historically, the district has replaced school buses on a 13 year schedule. Due to capital budget constraints, no buses were bought last year. The capital budget now includes the purchase of a couple extra buses each year to get back on schedule.

❖ Food & Nutrition Services Equipment Replacement [Project 3808] – Food and Nutrition Services has developed a replacement schedule for steamers, with the assistance of Facilities Services. Over the next three years, FNS plans to replace 34 steamers at a current cost of $13,000 per steamer. The replacement needs are based on a new certification requirement by the State of Florida for steam equipment with boilers. Besides the fact that the certification process is expensive due to required power modifications, the current boiler systems do not hold up well under local water conditions, and must be replaced at a cost almost half the replacement cost of an entire steamer. To expedite this replacement process, and to fund additional ancillary projects, the school district will budget $100,000 in capital funds for the FNS department, and FNS budget will fund another $100,000 for 2012-2013.

❖ District-Wide Equipment for all Departments [Project 3808]

❖ Custodial/Maintenance Equipment [Project 9910] – to replace scrubbers, carpet machines, pressure washers, truck boxes, tools, trailers, and similar items.

❖ Radio Systems [Project 4005] – to continue the use of county-wide inter-governmental public safety radio system for transportation and school support communication, this also includes the use, repair, replacement of campus-wide two-way radio systems at schools, and to upgrade the system if necessary.

❖ Security Cameras [Project 4010] – to fund the systematical replacement and upgrades of video security cameras at all schools and facilities.

❖ Fencing [Project 3670] – to upgrade and enhance exterior areas on campuses and facilities to continue to provide for single point entries to campuses.

❖ Access Control/Electronic Locking Devices [Project # TBD] – to fund the upgrades to access control for schools and facilities as well as to provide funds for repair and replacement to existing systems.

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CHAPTER 4: PLANNING CYCLE

An essential part of the district's incorporation of the CIP process is the establishment of a planning cycle that enables all stakeholders – School Board, Cabinet, principals, instructional staff, support staff, students, parents, and community – to know the status of all projects. Such a process empowers those responsible for identifying projects and establishes a shared understanding of project time lines. The table below provides the district's planning cycle, beginning each September with the adoption of the budget and the CIP. Implementation is done by the Capital Projects Team, facilitated by the Director of Long Range Planning and consisting of these staff:

- Executive Directors of Elementary, Middle, and High Schools
- Department Heads of Construction, Facilities, Technology & Information Services, Safety & Security, Telecom & Network Systems, and Instructional Technology
- others as needed.

The **Capital Budget / Planning** column entails district-wide tasks facilitated by the Budget Office and the Long Range Planning Office, including coordinating with state regulations, collaborating with local governments, prioritizing school and departmental facility needs, implementing the district's goals, and submitting budgets and plans to the School Board. The most critical event for school-based administrators occurs each January as lists are compiled of those small facility projects (a) necessary for the start of the next school year [e.g., remodeling of a space to another use; health and safety improvements], and (b) requested as part of short- or long-term instructional initiatives or facility enhancements [e.g., upgrading telecom; expanding bleachers; adding sidewalks]. All projects are prioritized and assigned to revenue sources appropriate to the project type.

The **Mid-Large Projects** column concerns facility projects such as new construction, major remodeling, major site work, and HVAC and related systems whose costs are $50,000 to the many millions. A significant improvement in the planning cycle is the goal of completing large projects early enough to allow for the commissioning of the major building systems.

The **Small Projects** column concerns important, but less expensive, facility projects deemed vital by building administrators. Such projects are primarily renovations and remodeling of existing spaces, costing less than $50,000. Some of the work is completed by district staff, while some is contracted out.

	Capital Budget / Planning	**Mid-Large Projects**	**Small Projects**
September	Board adopts budget and CIP. Planning computes program capacities. Team begins campus master plans and specialized studies.	Board advertises for Construction contracts.	Team reviews summer projects, and finalizes priorities for current year.
October	Planning computes mobility report. FTE 1 occurs. Class size report received.	Construction conducts professional selection and contract negotiation	Crews begin renovations and remodeling.
November	Planning receives and processes county and municipal CIPs.	Board approves contracts.	Team reviews progress.

	Capital Budget / Planning	Mid-Large Projects	Small Projects
December	Budget Office submits official enrollment projections for next year to DOE. Planning completes the classroom/relocatables utilization study.	Team reviews progress.	
January	Facility Managers canvass principals and cost center heads for desired capital projects. Capital Projects Matrix is updated.		Team reviews progress.
February	Team reviews short- and long-term instructional initiatives for facility issues. FTE 2 occurs.	Team prioritizes list for next year	Team prioritizes list for next year
March	Budget Office finalizes school-based projections. Planning prepares CIP draft.		Team reviews progress.
April	Team analyzes all campuses to ensure sufficient student stations.	Team reviews progress.	Design-Build contracts are undertaken for projects to be completed during the summer.
May	Team prioritizes projects lists; updates cost estimates. Team processes new statutes from Legislature.		Team reviews progress.
June	FTE 3. Team finalizes budget. Planning finalizes CIP.	Crews complete projects necessary for next school year.	Crews begin projects necessary for next year.
July	FTE 4. Board adopts tentative budget.	Crews complete commissioning for new buildings.	Crews complete projects necessary for next year.
August	Planning updates classroom changes; performs day-5 analyses of enrollments and facilities. Budget Office coordinates staffing and facility changes.	New instructional spaces open.	Small projects are completed.

APPENDIX I - GLOSSARY

Ancillary Plant -- is comprised of the building, site, and site improvements necessary to provide such facilities as vehicle maintenance, warehouses, maintenance, or administrative buildings necessary to provide support services to an educational program.

Auxiliary Facility -- means the spaces located at educational plants which are not designed for student occupant stations.

BEBR – is the Bureau of Economic and Business Research, an applied research center at the University of Florida. BEBR's Mission is
- To collect, analyze and generate economic and demographic data on Florida and its local areas.
- To conduct economic, demographic and survey research that will inform public policy and business decision making.
- To distribute data and research findings throughout the state and the nation.

Board -- unless otherwise specified, means the School Board of Sarasota County.

Core Facilities -- means the media center, cafeteria, toilet facilities, and circulation space of an educational plant.

Department of Community Affairs – until 2011, the state of Florida agency [DCA] responsible for directing local government compliance with emergency management and growth management statutes. In 2011, DCA was incorporated into the Florida Department of Economic Opportunity and its duties are now to assist local communities plan for economic growth.

DCA Insignia – the decal, mandated by Florida statutes, which certifies that a relocatable meets all state standards.

Department of Education -- the state of Florida agency [FDOE] responsible for directing local school district compliance with public education statutes.

Educational Facilities -- means the buildings and equipment, structures, and special educational use areas that are built, installed, or established to serve primarily the educational purposes and secondarily the social and recreational purposes of the community and which may lawfully be used as authorized by the Florida Statutes and approved by boards.

Educational Plant -- comprises the educational facilities, site, and site improvements necessary to accommodate students, faculty, administrators, staff, and the activities of the educational program of each plant.

Educational Plant Survey -- means a systematic study of current educational and ancillary plants and the determination of future needs to provide an appropriate educational program and services for each student based on projected capital outlay FTE's approved by the Department of Education.

Failed Standard – is the designation mandated by FDOE effective July 1, 2011, for factory-built instructional relocatables that are more than 20 years old and that have no DCA insignia. Such designation automatically changes the Design Code to "General School" space and changes student stations to zero.

Feasibility Study -- means the examination and analysis of information related to projected educational facilities to determine whether they are reasonable and possible.

FISH-- is the Florida Inventory of School Houses, a multi-faceted database into which all Florida school districts enter detailed information about every space on every site on every parcel of land.

FISH Capacity -- the FDOE-determined maximum student capacity for K-12 public schools based upon the Class Size Reduction amendment, various statutes, and agency regulations.

ILA – in this case, the *Interlocal Agreement for Public School Facility Planning,* as amended in 2008; parties include the SDSC, Sarasota County, the City of Venice, the City of North Port, the City of Sarasota, and the Town of Longboat Key.

Impact Fees – any fee designed to ameliorate the financial effect of demand for public services created by population growth or residential development.

Local Planning Agency -- the appointed planning board or commission that serves in an advisory capacity to the county and each municipality for all land use issues.

Long-Range Planning -- means devising a systematic method based on educational information and needs, carefully analyzed, to provide the facilities to meet the goals and objectives of the educational agency for a period of at least five years.

Low-Energy Usage Features -- means engineering features or devices that supplant or minimize the consumption of fossil fuels by heating equipment and cooling equipment. Such features may include, but are not limited to, high efficiency chillers and boilers, thermal storage tanks, solar energy systems, waste heat recovery systems, and facility load management systems.

Maintenance and Repair -- means the upkeep of educational and ancillary plants, including, but not limited to, roof or roofing replacement short of complete replacement of membrane or structure; repainting of interior or exterior surfaces; resurfacing of floors; repair or replacement of glass; repair of hardware, furniture, equipment, electrical fixtures, and plumbing fixtures; and repair or resurfacing of parking lots, roads, and walkways. The term "maintenance and repair" does not include custodial or grounds-keeping functions, or renovation except for the replacement of equipment with new equipment of equal systems meeting current code requirements, provided that the replacement item neither places increased demand upon utilities services or structural supports nor adversely affects the function of safety to life systems.

Need Determination -- means the identification of types and amounts of educational facilities necessary to accommodate the educational programs, student population, faculty, administrators, staff, and auxiliary and ancillary services of an educational agency.

New Construction -- means any construction of a building or unit of a building in which the entire work is new or an entirely new addition connected to an existing building or which adds additional square footage to the space inventory.

Passive Design Elements -- means architectural features that minimize heat gain, heat loss, and the use of heating and cooling equipment when ambient conditions are extreme and that permit use of the facility without heating or air-conditioning when ambient conditions are moderate. Such features may include, but are not limited to, building orientation, landscaping, earth bermings, insulation, thermal windows and doors, overhangs, skylights, thermal chimneys, and other design arrangements.

Portable – see "Relocatable"

Program Capacity -- is the number of students who can be scheduled given the statutory class size constraints, student demographics, and programmatic offerings. Typically, this district-derived number is 10-20 % less than FISH Capacity.

Public Education Capital Outlay (PECO) Funded Projects -- means site acquisition, renovation, remodeling, construction projects, and site improvements necessary to accommodate buildings, equipment, other structures, and special educational use areas that are built, installed, or established to serve primarily the educational instructional program of the district school board, community college board of trustees, or university board of trustees.

Relocatable – according to SREF, a building that is designed to be moved to a new location.

Remodeling -- means the changing of existing facilities by rearrangement of spaces and their use and includes, but is not limited to, the conversion of two classrooms to a science laboratory or the conversion of a closed plan arrangement to an open plan configuration.

Renovation -- means the rejuvenating or upgrading of existing facilities by installation or replacement of materials and equipment and includes, but is not limited to, interior or exterior reconditioning of facilities and spaces; air-conditioning, heating, or ventilating equipment; fire alarm systems; emergency lighting; electrical systems; and complete roofing or roof replacement, including replacement of membrane or structure. As used in this subsection, the term "materials" does not include instructional materials.

Satisfactory Educational Facility -- means a facility that has been recommended for continued use by an educational plant survey or that has been classified as satisfactory in the state inventory of educational facilities.

SDSC – the School District of Sarasota County.

Site -- means a space of ground occupied or to be occupied by an educational facility or program.

Site Development -- means work that must be performed on an unimproved site in order to make it usable for the desired purpose or work incidental to new construction or to make an addition usable.

Site Improvement -- means work that must be performed on an existing site to improve its utilization, correct health and safety deficiencies, meet special program needs, or provide additional service areas.

Site Improvement Incident to Construction -- means the work that must be performed on a site as an accompaniment to the construction of an educational facility.

Site Selection – means the process, authorized by statute, rule, and the ILA, to select real property for future schools and ancillary facilities.

Satellite Facility -- means the buildings and equipment, structures, and special educational use areas that are built, installed, or established by private business or industry in accordance with chapter 6A-2, Florida Administrative Code, to be used exclusively for educational purposes to serve primarily the students of its employees and that are staffed professionally by the district school board.

SREF – the *State Requirements for Educational Facilities*, the State Board of Education-approved document that contains all requirements for public education facilities in Florida.

Ultimate Capacity – means the district-derived maximum number of students who may be accommodated at a particular site given the program capacity, the core capacity, and the available land [on campus or adjacent], and the core capacity.