



TO: Sarasota County School Board
Lori White, Superintendent

THROUGH: Scott Lempe, Deputy Superintendent

FROM: Kathie Ebaugh, AICP, Planning Director

DATE: May 12, 2016

RE: School Concurrency, Level of Service Standard, and School Element

Background

In 2008 Sarasota County School Board in partnership with Sarasota County, Cities of North Port, Sarasota, and Venice, and the Town of Longboat Key established school concurrency. As stated in Chapter 6 of the Interlocal Agreement (at Attachment 2) for Public School Facility Planning for the County of Sarasota, Florida (ILA), concurrency is,

“The mechanisms for coordinating the development, adoption, and amendment of Sarasota County School Board’s Five-Year Capital Facilities Plan, as well as the public school facilities, the intergovernmental coordination and the capital improvements elements of the County and Cities’ comprehensive plans.”

The purpose is to ensure that there is appropriate levels of school capacity in the appropriate locations to meet the current needs of Sarasota County residents and demands of future residents.

Policy Need and Concern

In the eight years since the establishment of concurrency, Sarasota County School Planning Department has learned a great deal about how to implement and maintain school concurrency. As a result of this experience, the Planning Department has identified a number of concurrency procedures and implementation practices that need to be updated and changed. As established through the adopted ILA and the associated School Facilities Comprehensive Plan Element (Element), the updates and changes include:

1. Updates to the methodology for calculating school capacity. ILA Chapter 4.2(a)
2. Updates to the Adopted Level of Service Standards (LOS) for Sarasota County Schools. ILA Chapter 4.2(b)
3. Changes to the ILA and Element to reflect these updates

Attached to this memo is a copy of the ILA that established school concurrency in order to allow the Board an opportunity to better familiarize yourselves with this policy.

Board Direction

Starting with the May 17, 2016 Board Workshop, the Planning Department will lead a series of discussions with the Board and other interested stakeholders about current school concurrency policies, procedures, and practices. These parties, as identified within the ILA include the School Planning Oversight Committee, Sarasota County Interlocal School Planning Team, Local Planning Agencies, and other associated School Board Staff. The goal of these discussions will be to

- 1) Determine what changes to school concurrency are needed; and
- 2) Ensure the documents that govern school concurrency – the ILA and the Element—may be amended by all affected parties together at the 2017 Convocation of Governments scheduled for January 20, 2017.

At this first meeting we'd like to start with a discussion of school LOS. The discussion will consider the following items:

- What are LOS Standards?
- How does Sarasota County School use LOS?
- Why LOS Standards are important?
- How does the ILA define School LOS Standards?
- Why should we consider making changes to the current standards?

You'll find language that talks about capacity and levels of service beginning on page 7 of the attached agreement. Additionally, recognizing that this topic is not one that the School Board discussed often, Attachment 1 provides some information that will help introduce you to this topic and prepare you for Tuesday's workshop discussion.

We look forward to beginning this important school planning discussion with you.

ATTACHMENT 1: Basics of Levels of Service Standards

Topic 1: What are LOS Standards?

- Level of Service Standards (LOS) are measures of the minimum amount of a public facility or infrastructure systems which must be provided to meet that community's basic needs and expectations. LOS measures are typically expressed as ratios of facility capacity to the number of users. In Schools, the LOS ratio is defined through an analysis of 1) the maximum capacity in a school as it relates to 2) the maximum number of student seats in a classroom.

Once LOS standards are established, they are used to measure whether existing facilities and services are adequate to serve its citizens, or whether there are deficiencies that should be corrected. They also serve as yardsticks to measure whether existing capacity is adequate to handle new development, or to determine what facility improvements will be required to avoid overloading existing facilities. As the community grows in population, LOS assure that facilities and services will keep pace with that growth.

Why LOS Standards are important?

- LOS Standards are important because they are the basis through which Sarasota County Schools plans for school capacity needs and demands. The measurement of the LOS Standards ensures that Sarasota County Schools can meet the needs of existing Sarasota County residents while planning for the demands of future development. The application of the adopted LOS Standards is accomplished through an interlocal partnership by which Sarasota School District Planning Department works in conjunction with the Planning Departments of all local municipal governments in Sarasota County – unincorporated Sarasota County, Cities of North Port, Sarasota, and Venice, and the Town of Longboat Key, as well as residential developers. This partnership and planning process is outlined in the ILA and the Element.

How does Sarasota County School use LOS Standards?

- Sarasota County Schools uses LOS Standards in a number of applications including:
 - Establishing the usable number of student stations at a school based on its program and classroom function.
 - Establishing the number of student stations available for future students.
 - Determining concurrency for new residential development. This evaluation determines the impact a new development will have on existing school facilities and educational services. The evaluation ensures that there are adequate educational facilities to meet the needs of current residents and households in Sarasota County as well as to meet future demands caused by growth and development. According to the ILA and the Element, a proposed residential development must receive confirmation of concurrency before it may proceed with the development process.
 - Determining available student stations remain for students that may request a change in school.
 - Establishing the school attendance zones location and boundaries.
 - Determining projections for future school growth and capacity needs in the future.

- Identifying and preparing for needed changes to school capacity including new classroom wings, schools, changes in attendance zones, need for portables, etc...
- Planning for the annual CIP capital improvement budgets and prioritizing facility projects based on needs to maintain LOS Standards.

How does the current interlocal define Sarasota County Schools LOS Standards?

- The current LOS Standard for Sarasota County Schools is based on permanent program capacity. Permanent program capacity is an annual assessment of the number of usable student stations in a school. The assessment is conducted each year based on the two month enrollment counts. As stated in ILA Chapter 4.2(a) permanent program capacity is defined as,

“The School Board hereby selects permanent program capacity as the uniform methodology to determine the capacity of each school. Relocatables are not considered permanent capacity. For special purpose schools, the methodology to determine capacity shall be total program capacity, including relocatables.

The School Board staff will determine whether adequate school capacity exists for a proposed development, based on the level of service standards, concurrency service areas, and other standards set forth in this agreement, as follows:

1. Calculate total school facilities by adding the capacity provided by existing school facilities to the capacity of any planned school facilities within the first three years of the Five-Year Capital Facilities Plan.
2. Calculate available school capacity by subtracting from the total school facilities the sum of:
 - a. Used capacity (enrollment);
 - b. The portion of reserved capacity (received certificate of concurrency) projected to be developed within three years;
 - c. The portion of previously approved development (vested from concurrency) projected to be developed within three years; and
 - d. The demand on schools created by the proposed development.”

Why should we consider making changes to the current standards?

After eight years of working with permanent program capacity as the basis for the School Districts’ adopted LOS Standard, staff has found a number of procedural concerns with this standard. Including:

1. The amount of time it takes to determine the annual assessment of permanent program capacity figures.
2. The capacity numbers for the school change annually as the program and classroom use change.
3. The application for the LOS Standards change annually.