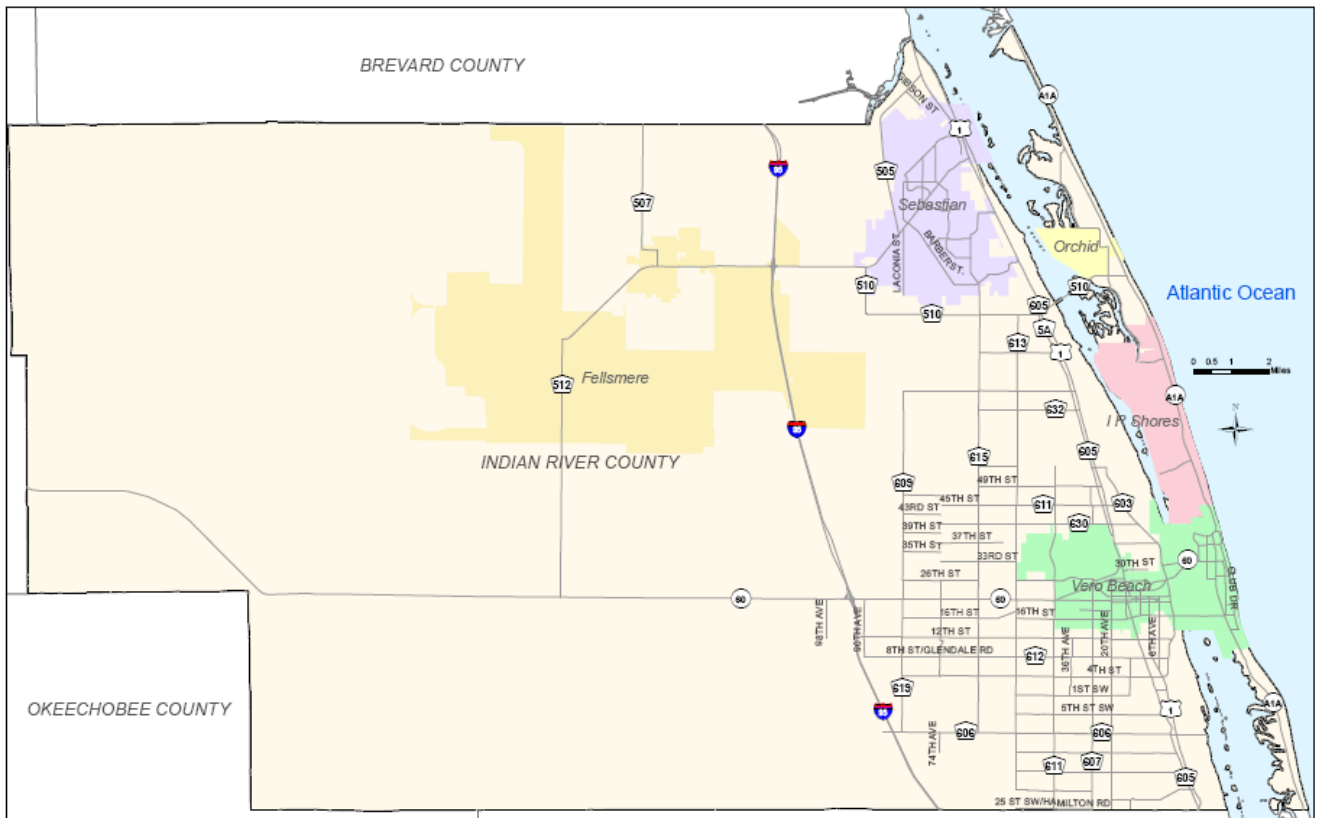


INDIAN RIVER COUNTY Annual School Concurrency Assessment Report for 2010-2011



Indian River County Planning Division
in cooperation with School District Facilities Planning



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2. Adopted 2011-2015 Capital Improvement Project (5 Year Facilities Plan)
3. Draft Partial List of 2012-2016 Capital Improvements
4. HB 7207 Excerpt on School Planning/Interlocal Agreement Requirement
5. HB 7207 Excerpt on School Concurrency Changes

Indian River County Annual School Concurrency Assessment Report for 2010-2011

PURPOSE

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

BACKGROUND

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

For Indian River County, the adopted school concurrency provisions are contained or referenced in the following documents:

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

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

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

For all public elementary, middle, and high schools that are not magnet schools or charter schools, the school district has established attendance zones, also known as school service area boundaries (SSABs). Those service areas are critical components of the school district’s concurrency system. That system is “location-based”, tracking and comparing the location and intensity of new residential development with the capacity of the affected elementary, middle, and high school service areas. As a result, capacity, demand, and available capacity are evaluated on a school service area boundary (SSAB) basis. With this system, concurrency is considered met if there is available capacity to serve a residential development either within the affected school service area or within an adjacent school service area.

State Legislation Changes in 2011

During its 2011 session, the state legislature passed a 349 page “growth management” bill known as HB 7207. That bill was signed by the governor on June 2, 2011, and the legislation went into effect soon thereafter. Among its various provisions, the bill made changes to portions of Florida Statutes Chapter 163 and certain public school planning and school concurrency requirements. Overall, the bill retained the state requirement for interlocal agreements between school districts and local governments to share data and to coordinate planning and development processes (see attachment #4). The bill, however, eliminated the state mandate for school concurrency, while allowing local governments the option to continue to require and implement school concurrency (see attachment #5). Although HB 7207 eliminated the school concurrency mandate, local governments and school districts that opt to take advantage of that allowance and eliminate local school concurrency requirements must amend their local comprehensive plans and interlocal agreements to do so.

When the Staff Working Group (SWG) met in February and March 2011, and the Citizens Oversight Committee (COC) met in April 2011, HB 7207 was going through the legislative process. Anticipating passage of the bill, the SWG and COC discussed the local experience with school concurrency and its role in resolving the Fellsmere Elementary concurrency issue last year. During those discussions, the SWG and COC each reached a consensus that local school concurrency requirements were beneficial and that the requirements should be continued. Therefore, no school concurrency related changes to local comprehensive plans or the interlocal agreement were recommended.

SCHOOL CONCURRENCY STATUS

- CAPACITY CHANGES FOR SCHOOLS WITH ATTENDANCE ZONES

Overall net capacity changes districtwide for the next five years are summarized as follows:

Elementary School Capacity: + 381 in 2012 (Vero Beach Elementary and Fellsmere Elementary)
 Middle School Capacity: 0 during 2011-2016
 High School Capacity: + 570 in 2013

Table 1

Capacity Changes during First 3 Years of Proposed 2012-2016 5 Year Facilities Plan

Existing Schools	New Schools	Additions/ Major Renovations	Closures	Net Change	Year
Fellsmere Elem	N/A	Cafeteria and classroom additions	N/A	+190	2012
Vero Beach Elem	N/A	Replacement on site	N/A	+191	2012
Sebastian River HS	N/A	Freshman Learning center	N/A	+570	2013

There were no changes to the capacity of schools with attendance zones during the 2010/2011 period. Capacity-producing improvements for schools **without** attendance zones (magnet schools) are addressed on page 10 of this report.

- DEMAND CHANGES

ENROLLMENT

In 2010, districtwide enrollment decreased by 229 students; that follows a decrease of 97 students in 2009. Student enrollment forecasts shown in tables 3, 4, and 5 below are for October counts and vary from the state forecast which includes the average of the Oct./Feb counts.

**Table 2
Historic Actual Enrollment 2003-2011**

	K-5	Middle	High	Total	Annual Change
2003	6,984	3,798	4,605	15,387	545
2004	7,166	3,825	4,845	15,836	449
2005	7,710	3,759	4,830	16,299	463
2006	7,624	3,847	4,851	16,322	23
2007	7,653	3,834	4,885	16,372	50
2008	7,258	3,847	4,838	15,943	-429
2009	7,230	3,817	4,799	15,846	-97
*2010	7,265	3,818	4,546	15,629	-217
*2011	7,193	3,756	4,608	15,556	-73

*Table 2 shows actual enrollment for 2010 and 2011, while Tables 3, 4, and 5 show what the forecasted figures were for 2010 and 2011.

**Table 3
Elementary School Total Enrollment & Net Change 2010-2016**

*2010	7,265	+35
*2011	7,193	-72
2012	7,094	-99
2013	7,214	+120
2014	7,308	+94
2015	7,335	+27
2016	7,419	+84

For the elementary school enrollment forecast, the school district has assumed that there will be little or no new housing development during the next two years. The district, however, forecasts that there will be moderate growth between 2012 and 2016. That growth will be driven primarily by an increasing kindergarten enrollment from higher birth trends. The local forecast is 105 students lower than the Florida Department of Education (DOE) forecast for 2011.

Table 4
Middle School Total Enrollment & Net Change 2010-2016

*2010	3,818	+1
*2011	3,756	-53
2012	3,660	-96
2013	3,627	-23
2014	3,556	-71
2015	3,593	+37
2016	3,591	-2

Currently, the school district forecasts that middle school enrollment for 2012 and 2013 will be flat, based on little or no new housing development and a stable incoming 6th grade. Around 2014-2015, this trend will change, and the middle schools will begin growing again. This local forecast for 2011 is 71 students lower than the DOE forecast for 2011.

Table 5
High School Total Enrollment & Net Change 2010-2016

*2010	4,546	-253
*2011	4,608	+62
2012	4,738	+130
2013	4,673	-65
2014	4,581	-92
2015	4,614	+33
2016	4,610	-4

Generally, high school projections are impacted more by the size of the incoming 9th grade than by new housing. For that reason, high schools may show a decline in enrollment as some smaller classes move through the grades and graduate. Given current economic and housing conditions, high school enrollment will remain relatively stable in the near future. The forecasted growth is 163 students higher than the DOE forecast for 2011.

Overall, the local enrollment forecast predicts that there will be little or no growth in 2011, with slight growth occurring from 2012 through 2016. In July 2011, the school district received the state COFTE (Capital Outlay Full Time Equivalent) student enrollment forecast. The state forecast for public school enrollment (non-charter schools) was 15,301 students while the school district's 2011/2012 13-day student count performed at the beginning of the 2011/2012 school year yielded an actual enrollment of 15,645 students. Based on actual enrollment data, school district staff believe that the district's forecast data in tables 3, 4, and 5 are good and that next year's forecast from the state will be adjusted higher.

Ten and Twenty Year Forecast

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

Population and Enrollment Forecast

	2010	2015	2020	2030
Indian River County Population	138,028	155,000	169,300	196,900
Public School Student Enrollment (non-charter schools)	15,617	16,350	16,978	23,627

Permits Issued and Future Units Vested

In Indian River County, school concurrency went into effect on July 1, 2008. From July 1, 2008 to June 30, 2009, 387 permits for construction of residential units were issued. From July 1, 2009 to June 30, 2010, 260 permits for construction of residential units, or 33% fewer than the previous year (2008/2009), were issued. For the 2010/2011 period, there was a 54% (or 140 residential units) increase in permits issued from the 2009/2010 period. Data for the 2010/2011 period are shown in the chart below.

2010/2011 New Residential Units Permitted

Month	Vero Beach	Fellsmere	IR Co.	IR Shores	Sebastian	Total
July 2010	2	0	25	0	5	32
August 2010	1	0	26	0	1	28
September 2010	1	3	25	0	2	31
October 2010	1	1	25	1	0	28
November 2010	4	0	19	0	2	25
December 2010	0	0	22	0	2	24
January 2011	1	2	13	1	1	18
February 2011	2	0	21	0	2	25
March 2011	2	0	23	0	10	35
April 2011	0	1	28	0	6	35
May 2011	0	0	27	3	2	32
June 2011	1	0	77	5	4	87
TOTALS	15	7	331	10	37	400

Since concurrency went into effect in Indian River County, each building permit for a residential unit in a project approved prior to July 1, 2008 has been exempt from school concurrency. Although those units were “exempt” from the school concurrency test, students anticipated to be “generated” by those units are accounted for under “vested demand” tracked in the school district’s concurrency system.

The table below is a spring 2011 summary report from the school district’s concurrency system. That table shows that there is available capacity for every school service area except for the Beachland, Citrus and Treasure Coast elementary schools. Because capacity is available in one or more adjacent elementary school service areas, the service areas of the “over capacity” elementary schools (Beachland, Citrus, Treasure Coast) are considered to have capacity. In the case of Sebastian River High School and Fellsmere Elementary School, concurrency was met because sufficient capacity-increasing improvements are scheduled within the first 3 years of the adopted 5 year school facilities plan. That additional capacity is indicated in the “Programmed School Capacity” column of the table below.

Development Review Summary

School Service Area Boundary (SSAB)	Current School Capacity	Programmed School Capacity*	Total School Capacity	Current Enrollment	**Vested Demand	Total Demand	***Available Capacity
Beachland ES	555	0	555	583	0	583	-28
Citrus ES	573	0	573	649	0	649	-76
Dodgertown ES	608	0	608	488	1	489	119
Fellsmere ES	543	190	733	609	0	609	124
Glendale ES	634	0	634	567	0	567	67
Highlands ES	602	0	602	455	4	459	143
Pelican Island ES	586	0	586	432	3	435	151
Sebastian ES	637	0	637	515	22	537	100
Treasure Coast ES	599	0	599	639	8	647	-48
Vero Beach ES	559	191	750	563	3	566	184
Gifford MS	1,082	0	1,082	1,031	1	1,032	50
Oslo MS	1,118	0	1,118	914	3	917	201
Sebastian MS	1,093	0	1,093	984	15	999	94
Storm Grove MS	1,280	0	1,280	818	0	818	462
Sebastian HS	1,848	570	2,418	1,873	22	1,895	523
Vero Beach HS	3,046	0	3,046	2,672	4	2,676	370

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

**Vested Demand includes the expected student yield from residential units permitted since July 1, 2008.

***The adjacency rule allows development approvals where space is available in an adjacent SSAB. Therefore, school concurrency may be satisfied even though "Available Capacity" for an individual school may have a negative value.

- SERVICE AREA BOUNDARY CHANGES

During the 2010-2011 report year, the only major change in Service Area Boundaries occurred with expansion of the Storm Grove Middle School attendance zone into a north county area and a south county area. The changes took effect at the beginning of the 2011/2012 school year and generally balance enrollment and utilization at Oslo, Gifford, Storm Grove, and Sebastian middle schools. The Storm Grove attendance zone changes are shown on the attached map (see attachment #1).

- FACILITIES PLAN AND LOS

Facilities Work Plan

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

In the school district's facilities work plan that was adopted in September 2008, the projected 5 year expenditures were \$220,000,000, with roughly \$100 million programmed in 2008/2009. During 2008/2009, actual capital expenditures were significantly less than \$100 million due to the intentional delay of several projects. Consequently, capital projects were pared-down in the facilities work plans adopted in September 2009 and September 2010. In contrast to the September 2008 facilities plan, the facilities plan adopted in

September 2010 projects capital expenditures of less than \$108,000,000 during FY 2011-2015. Overall, those capital projects that have the most direct effect on school concurrency are capacity enhancement projects. It is anticipated that the 2012-2016 facilities plan will reflect expenditures of \$63.7 million, and include the capacity producing projects described in the chart below.

As shown in the table below, the adopted FY2011-2015 facilities plan and the proposed 2012-2016 facilities plan include funding for completion of capacity enhancement projects at Vero Beach Elementary, Fellsmere Elementary, Sebastian River High School, and Osceola Magnet.

Capacity Producing Projects

Capacity Enhancement Projects	Capacity Added	Estimated Completion
Fellsmere Elementary addition	190	2012
Addition to Sebastian River High School	570	2013
Replacement of Vero Beach Elementary School	191	2012
*Replacement of Osceola Elementary School at Pointe West	192	2013

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

Current and Projected LOS

In 2008, middle school enrollment exceeded 100% capacity. With the opening Storm Grove Middle School in 2009, however, all middle schools remain below 90% utilization.

District-wide, the projected LOS at all grade levels is expected to be below 100% utilization through 2016. Although there are regional differences at the School Service Area Boundary level, the school district is expected to make the best use of available capacity and adjust boundaries (as with the Storm Grove attendance zone changes) where necessary.

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

Year	Elementary Forecast	Elementary Capacity	% util	Middle Forecast	Middle Capacity	% util	High Forecast	High Capacity	% util
2008	7,316	8,228	89%	3,826	3,351	114%	4,666	4,866	96%
2009	7,290	8,228	89%	3,776	4,548	83%	4,665	4,966	94%
2010	7,342	7,696	95%	3,818	4,573	83%	4,546	4,894	93%
2011	7,501	7,696	97%	3,779	4,573	83%	4,514	4,894	92%
2012	7,094	8,077	88%	3,660	4,573	80%	4,738	4,894	97%
2013	7,214	8,269	87%	3,627	4,573	79%	4,673	5,464	86%
2014	7,308	8,269	88%	3,556	4,573	78%	4,581	5,464	84%
2015	7,335	8,269	89%	3,593	4,573	79%	4,614	5,464	84%
2016	7,419	8,269	90%	3,591	4,573	79%	4,610	5,464	84%

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

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

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

Year	Elementary Forecast	Elementary Capacity	% util	Middle Forecast	Middle Capacity	% util	High Forecast	High Capacity	% util
2008	5,227	5,978	87%	3,826	3,351	114%	4,666	4,866	96%
2009	5,380	5,874	92%	3,776	4,548	83%	4,665	4,966	94%
2010	5,500	5,896	93%	3,818	4,573	83%	4,546	4,894	93%
2011	5,486	5,896	93%	3,779	4,573	83%	4,514	4,894	92%
2012	5,438	6,277	95%	3,660	4,573	80%	4,738	4,894	97%
2013	5,622	6,277	90%	3,627	4,573	79%	4,673	5,464	86%
2014	5,630	6,277	90%	3,556	4,573	78%	4,581	5,464	84%
2015	5,659	6,277	90%	3,593	4,573	79%	4,614	5,464	84%
2016	5,748	6,277	92%	3,591	4,573	79%	4,610	5,464	84%

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

SCHOOL CONCURRENCY & COORDINATION PROCESS

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

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

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

SCADLS ISSUED DURING 2010-2011

Conditional SCADLs

The following table provides information on each conditional SCADL issued by the school district during the 2010-2011 period.

Conditional SCADLs Issued 2010/2011

Project	Students Generated by School Type		
	Elementary	Middle	High
Potential Residential Project on former St. Edward's lower school site	3	1	2

Final SCADLs

No Final SCADLs were issued by the school district during the 2010/2011 period.

CHALLENGES & ISSUES

- Concurrency System

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

- Level of Service

Based upon the adopted 2011-2015 school facilities plan, the proposed 2012-2016 school facilities plan, and approved attendance zone boundary changes, no level of service problems are anticipated.

- Retaining Local School Concurrency Requirement

As stated on page 5 of this report, recent state legislation eliminated the state mandate for school concurrency, but allowed local governments and school districts to retain school concurrency at the local level. The local experience with school concurrency has been beneficial; as such, the Staff Working Group and Citizens Oversight Committee both recommended that current procedures continue to be followed, without change.

ATTACHMENTS

1. School Service Area Boundary Map Changes
2. Adopted 2011-2015 Capital Improvement Program (5 Year Facilities Plan)
3. Draft Partial List of 2012-2016 Capital Improvements
4. HB 7207 Excerpt on School Planning/Interlocal Agreement Requirement
5. HB 7207 Excerpt on School Concurrency Changes

Note: The Indian River County Interlocal Agreement for Coordinated Planning and School Concurrency is available on-line at: http://www.irccdd.com/Planning_Division/Plans_Reports.htm