

## **PUBLIC SCHOOL FACILITIES DATA AND ANALYSIS**

### **INTRODUCTION**

The following is the Data and Analysis necessary to support the adopted Charlotte 2050 Plan goals, objectives and policies.

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

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

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

Within Charlotte County, the participants in school concurrency are Charlotte County, the City of Punta Gorda, and the School Board of Charlotte County. The review process requires that the public school facilities necessary to maintain the adopted Level of Service (LOS) for schools are in place prior to or concurrent with the student impact from new residential development.

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

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

## RELATIONSHIP TO 2050 PLAN

The GOPs identified in the *Public School Facilities Element* share a connection with several other elements of the Comprehensive Plan, including the following:

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

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

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

## LEGISLATION

### FEDERAL

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

### STATE

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

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

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

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

## LOCAL

Interlocal agreements allow governments to cooperate with one another in the performance of tasks, thereby reducing a duplication of services and possibly increasing cost efficiency. In 2003, the City, County and School Board executed the “Interlocal Agreement for Public School Facility Planning” in an effort to better coordinate such things as utility locations and school facility planning. As stated above, this agreement has been updated to include the required provisions for school concurrency. It was adopted in May of 2009, and is now titled, Updated Interlocal Agreement for Coordinated Planning and School Concurrency (ILA).

**INVENTORY AND ANALYSIS**

**CHARLOTTE COUNTY INFORMATION (POPULATION/TRENDS)**

**Methodology**

Regarding population numbers and trends, the *Public School Facilities Element* does not use the same methodology employed in the other elements of Charlotte 2050. State designs for school concurrency programs mandate, among other things, that the school elements of counties must be consistent with those of all municipalities within those counties, as well as being consistent with the interlocal agreement that ties those jurisdictions to the school districts affected. Charlotte County and the City of Punta Gorda have agreed to use a methodology that is familiar to the School Board of Charlotte County and that is more useful for correlation with student enrollment and calculating the impacts of development on public school capacity.

The major difference is in how the information is applied. While most population studies use the published figures from the most recent U.S. Census, the School District combines those numbers with an analysis of student enrollment numbers, housing types, and attendance boundaries to create useful student generation rates for proposed development. Understandably, the Department of Education prefers its projections. Evaluation of base data reveals that County projections are similar and would not result in significantly different outcomes. The methodology used is graphically outlined in the paragraphs below.

**Population Projections**

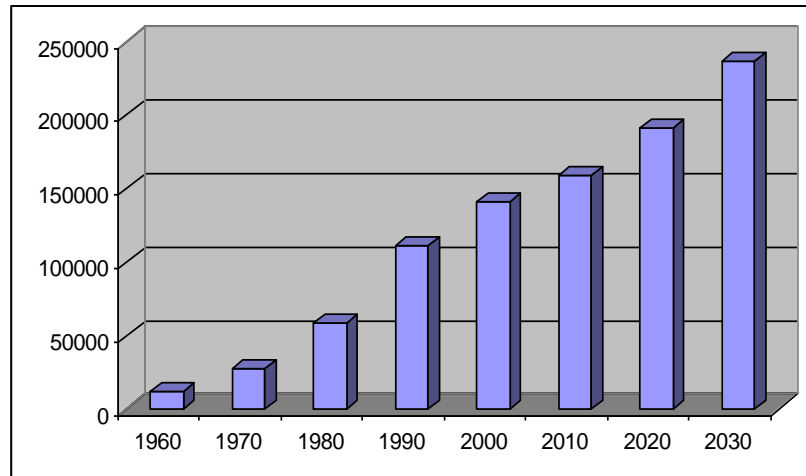
According to the 2000 U.S. Census the total population was 141,627. Of the 141,627 persons, 22,186 were students (Pre-K through 12) enrolled in school.

Table SCH-1: Charlotte County Population		
Year	Population	% Change
1980	58,460	
1990	110,975	90
2000	141,627	28
2010*	159,498	9

Source: US Census Bureau & Charlotte County Growth Management  
 \*2010 Estimate

Historic population data were collected for the entire County in 10 year increments dating back to 1980. Table SCH-1 above indicates that the overall population of the County has been steadily increasing through the year 2010. Graph SCH-1 below shows the steady population growth since 1960 and the projected growth through 2030.

**Graph SCH-1 - Population Estimates**



Source: Charlotte County Growth Management, 2009

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

Almost 50 percent of the County’s population is located in the central part of the County, between the Myakka River and the Peace River. Most of the development within the County has occurred along potable water lines, and the intensity of residential development is low.

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

The City of Punta Gorda is located south of the Peace River. This area also contains the rural communities Cleveland and Solana. The land south of Punta Gorda is mostly rural and agricultural, while the areas around Punta Gorda are urbanized.

Future growth will likely be concentrated in the southern and western areas of Charlotte County. This is further supported by recent development activity along Charlotte Harbor and the Gulf Coast.

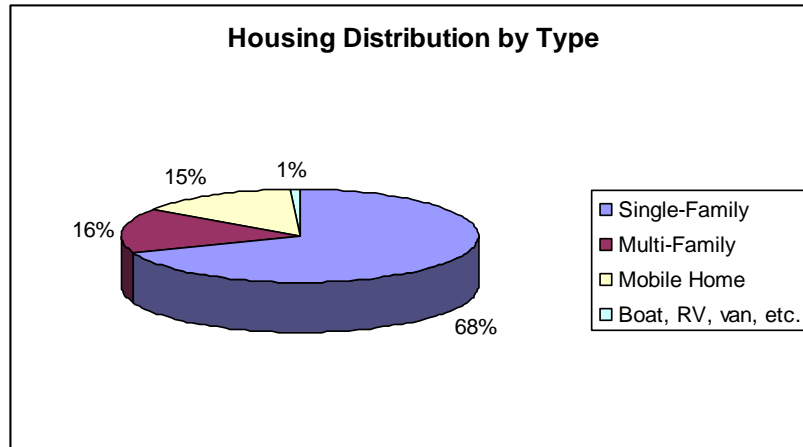
**Seasonal Population**

During the winter months many counties and cities in the State of Florida experience an increase in population due to the migration of seasonal residents. Charlotte County and its municipalities are no exception. Seasonal residents do not have a significant impact on the school age population because the seasonal population does not usually include families with children.

**Housing**

According to the 2000 U.S. Census, there were a total of 96,060 housing units within the County, including 71,026 occupied units and 25,034 vacant units. Based on a total population of 141,627, the average household size is 2.14 persons per household. The distribution percentage for the four housing categories is shown below in Figure SCH-1.

**Figure SCH-1: Housing Distribution by Type**



Source: US Census Bureau - 2000 US Census Demographic Profile

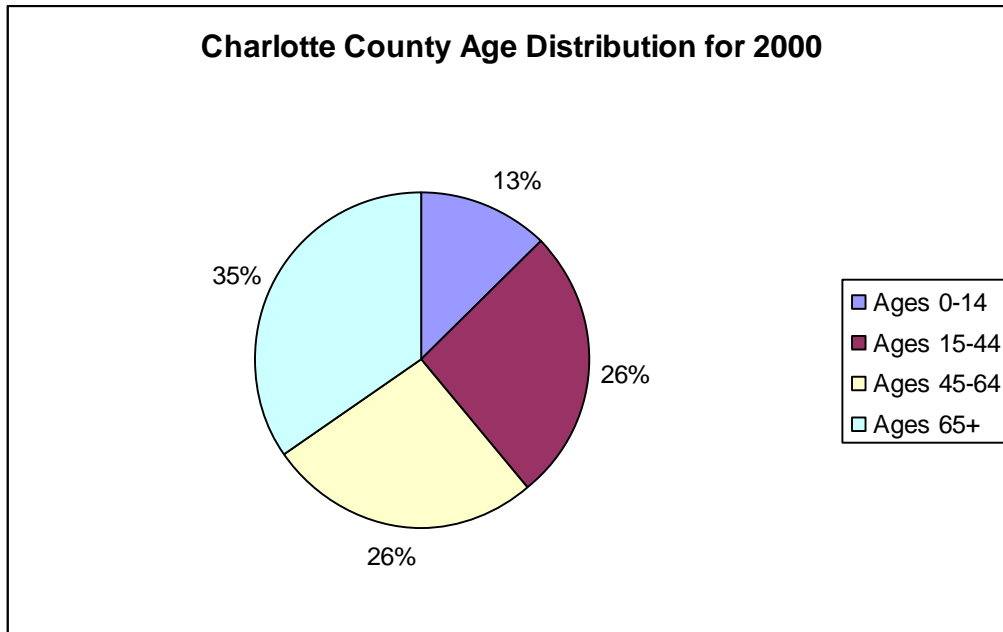
**RESIDENTIAL DEVELOPMENT**

**Growth Areas**

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

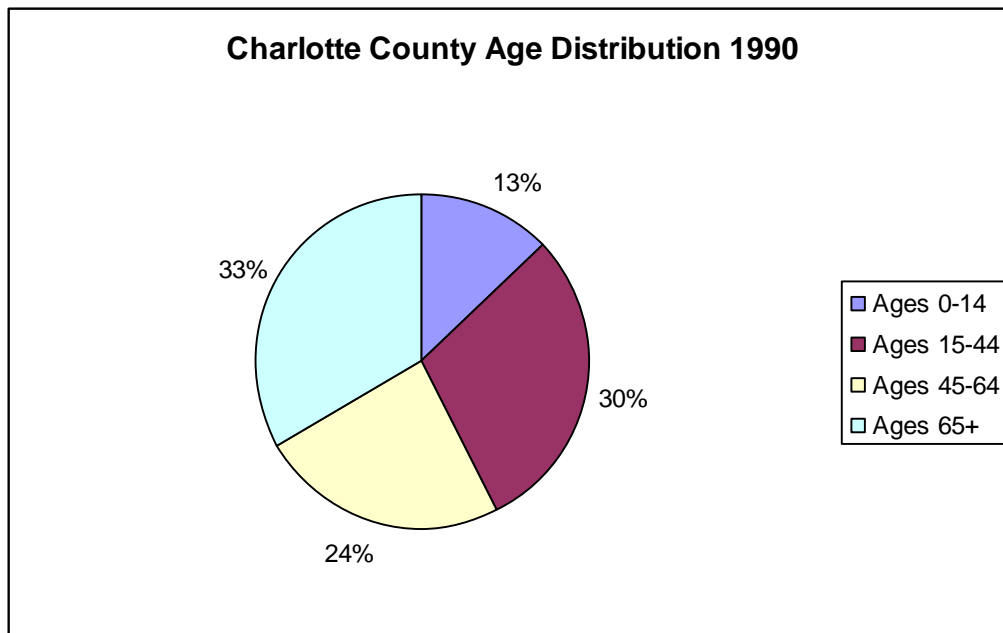
Around 35 percent of the Charlotte County 2000 population is 65 years of age or older. Another 26 percent of the County’s 2000 population is between the ages of 45 and 65. Together these two cohorts account for 61 percent of the County’s 2000 population. In 1990, these two cohorts accounted for 57 percent of the Charlotte County population. The age distribution indicates that the County remains a destination for retirees and those people who are approaching retirement age. Figure SCH-2 and Figure SCH-3 illustrate these age distributions.

**Figure SCH-2: Charlotte County Age Distribution for 2000**



Source: University of Florida Bureau of Economic and Business Research

**Figure SCH-3: Charlotte County Age Distribution 1990**



Source: University of Florida Bureau of Economic and Business Research

The 65 and older age bracket accounts for more than 30 percent of the district population. In the central area of the County, persons aged 65 and over make up 31 percent of the population while in other areas of the County the same bracket accounts for almost 40 percent of the population.

Approximately 14,964 residential dwelling units received permits in Charlotte County between 2003 and 2008, with the majority of the permits being issued to detached single-family homes. Table SCH-2 below provides a breakdown of County permits by year and unit type for a given timeframe.

Table SCH-2: Charlotte County Residential Permits 2003-2008 2003-2008 Charlotte County Residential Permitting				
Year	Detached Single Family	Duplex	Multi-family (3 or more units)	Mobile Homes
2003	1,785	40	49	189
2004	2,182	24	115	1,237
2005	2,756	67	135	1,661
2006	2,710	51	150	119
2007	915	32	58	107
2008	465	8	36	73
<b>Totals</b>	<b>10,813</b>	<b>222</b>	<b>543</b>	<b>3,386</b>

Source: Charlotte County Building Construction Services

In addition to the residential permits issued by the County, the City of Punta Gorda issued 407 detached single-family residential permits between 2004 and 2008. Table SCH-3 below provides a breakdown of City permits by year for a given timeframe.

Table SCH-3: City of Punta Gorda Single Family Permit Activity	
Year	Detached Single Family
2004	124
2005	100
2006	118
2007	37
2008	28
<b>Total</b>	<b>407</b>

Source: Charlotte County - PowerPoint Presentation at the 6th Annual Meeting to Coordinate Land Use and Public School Planning, May 4, 2009

Future residential development is most likely to occur in the Urban Service Overlay District, both within the Infill and Suburban Areas. In the urbanized area 59 percent of the land is vacant and



only 41 percent is developed. Table SCH-4 below presents a summary of the residential units approved in Charlotte County.

<b>Table SCH-4: 2006-2008 Summary of DRC Approved Lots/Units in Charlotte County</b>			
<b>2006 – 2008 Summary</b>			
	<b>2006</b>	<b>2007</b>	<b>2008</b>
<b>County</b>	1,958	3,897	203
<b>City</b>	144*	353*	3
<b>TOTAL</b>	2,102	4,250	206

Source: Charlotte County - PowerPoint Presentation at the 6th Annual Meeting to Coordinate Land Use and Public School Planning, May 4, 2009

**EXISTING PUBLIC SCHOOL FACILITY CONDITIONS**

**School-Age Population**

According to the 2000 U.S. Census, there were 12,932 students (Pre-K through 12) public and private school students attending public school in Charlotte County. Between 2004 and 2009, enrollment in Charlotte County schools decreased from 17,827 students to 16,992 students. Table SCH-5 shows the Public School trends in the last five years by grade level.

<b>Table SCH-5: Enrollment Change by Grade Level, 2004-2009</b>					
<b>Year</b>	<b>Elementary</b>	<b>Middle</b>	<b>High</b>	<b>Total</b>	<b>Annual Growth</b>
<b>2004</b>	7,246	4,560	6,022	17,827	
<b>2005</b>	6,904	4,319	6,007	17,229	-598
<b>2006</b>	7,167	4,201	6,076	17,445	216
<b>2007</b>	7,305	4,095	6,171	17,572	127
<b>2008</b>	7,119	4,051	6,283	17,453	-119
<b>2009</b>	6,983	4,056	5,953	16,992	-461

Source: Charlotte County Public Schools

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

The Charlotte County School District currently operates 10 elementary schools, 4 middle schools, 3 high schools, 1 pre-K center, and 3 specialty schools. As shown in Table SCH-6 below, the current enrollment, capacity and utilization of each school, by grade level (elementary, middle,

high) has been identified. There are currently 20,687 student stations accommodating the existing 16,424 students in elementary, middle and high school.

**Table SCH-6: Existing School Enrollment, Capacity and Utilization 2009-10**

SCHOOL NAME	Total FISH Capacity	SY 09/10		
		Enroll.	Cap.	Util.
<b>Elementary Schools</b>				
Vineland	880	731	880	83%
Myakka River	667	586	667	88%
Liberty	745	718	745	96%
Meadow Park	799	690	799	86%
Neil Armstrong	861	743	861	86%
Peace River	861	655	861	76%
Kingsway	732	666	732	91%
Deep Creek	884	788	884	89%
Sallie Jones	717	695	717	97%
East	861	596	861	69%
New Elementary School "A" (2016)		*	*	*
<b>Total</b>	<b>8007</b>	<b>6868</b>	<b>8007</b>	<b>86%</b>
<b>Middle Schools</b>				
L.A. Ainger	1023	959	1023	94%
Murdock Middle	880	915	880	104%
Port Charlotte Middle	1021	840	1021	82%
Punta Gorda Middle	1243	1171	1243	94%
<b>Total Middle</b>	<b>4167</b>	<b>3885</b>	<b>4167</b>	<b>93%</b>
<b>High Schools</b>				
Lemon Bay High	1567	1370	1567	87%
Port Charlotte High	2006	2024	2006	101%
Charlotte High	3160	1981	3160	63%
<b>Total High School</b>	<b>6733</b>	<b>5375</b>	<b>6733</b>	<b>80%</b>
<b>Combination / Other</b>				
The Academy	441	332	441	75%
Charlotte Harbor Center	215	144	215	67%
Baker Pre-K Center	324	201	324	62%
Charlotte Technical Center	800	730	800	91%
<b>Total Other</b>	<b>1780</b>	<b>1407</b>	<b>1780</b>	<b>79%</b>
<b>Student Total</b>	<b>20687</b>	<b>17535</b>	<b>20687</b>	<b>85%</b>
<b>DOE Capital Outlay FTE Forcast</b>	<b>20687</b>	<b>16424</b>	<b>20687</b>	<b>79%</b>

Source: Charlotte County School District

The location and school attendance boundaries of the schools identified in Table SCH-6 above have been provided in School Facilities Analysis Map (SFAM) Series Maps #1, #2 and #3 in SCH Appendix I. In addition to the existing school locations, the location of the existing and proposed

ancillary facilities operated by the School District has been provided as SFAM Series Map #4 in SCH Appendix I.

**Demographic Trends**

Charlotte County is demographically older than most Florida counties. The median age of the population is 54 years of age, and Charlotte County’s demographic composition is 96.7% Non-Hispanic. The Hispanic population has grown to 3.3% of the total population in the last five years. Although the public school population tends to follow similar patterns, it is more diverse than the County as a whole. Following a trend throughout Florida and the nation, Charlotte County’s Hispanic population has been the fastest growing of all racial groups. Table SCH-7 shows a comparison of the County and School District changes starting in 2000.

Table SCH-7: Population by Race and Ethnicity				
Race/Ethnicity	General Population		Student Population	
	2000	2006*	2000	2006
White	90.4%	92.1%	85.9%	77.9%
African-American	4.2%	5.5%	7.9%	8.6%
Hispanic	3.3%	4.7%	3.6%	7.5%
Asian	0.8%	1.3%	1.6%	1.7%
Am.Indian/Alaskan	0.2%	0.2%	0.4%	0.3%
Multi-racial	0.9%	0.9%	0.6%	4.0%

Source: Charlotte County Public Schools  
 \*Percentages obtained from U.S. Census

**Student Generation Rates**

Determining the number of students generated from new residential developments is necessary to accurately assess a new residential development’s impact on public schools. This student generation rate allows the School District to calculate the number of new students that can be expected from a residential development, based on the number and type of residential units proposed. With the projected number of students defined, the impact of the residential development on available school capacity can be determined. The current student generation multipliers are based on actual students residing in a variety of housing types.

Two data sets were used to calculate the student generation multipliers. These datasets were the 2009 Geographic Information Systems (GIS) property parcel file from the Charlotte County Land Information Office and October 2009 enrollment data from the School District. The student address data were geo-coded to property unit data and street centerline data to create a GIS point file with the spatial location of each student based on their school type and home address. Similar to the previous study, the updated analysis used over 95 percent of the total student population and the volume of data was large enough to offset occasional assignment errors. The total student population used in the multiplier analysis was 16, 447. Students with address errors or post office box addresses were not matched to an address by geo-coding. Additionally, home-schooled students and those attending non-traditional schools were not included in the analysis.

A comparative analysis was conducted to gain an understanding of how Charlotte County’s student generation multipliers compare to those prepared by other counties. Based on the analyses, CCPS has adopted a County-wide Blended Student Generation Multiplier found below. The blended multiplier is a simple calculation of occupied dwelling units to students by grade level and provides an accurate student generator for new development. The multipliers will be reviewed on a periodic basis. As new and updated information becomes available, the multipliers will be kept current and as accurate as possible while keeping in step with changes in the residential housing market in the County. Table SCH-8 below shows the resulting student generation rates by unit type and school type.

<b>Table SCH-8: County-wide Blended Student Generation Multiplier</b>				
<b>Units</b>	<b>Elementary</b>	<b>Middle</b>	<b>High</b>	<b>K-12 Total</b>
108,447	0.065	0.036	0.051	0.152

Source: Charlotte County Land Information Division, Growth Management Department, and Charlotte County School District, 2009

**Residential Development Student Impact**

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

Using the Student Generation Rates provided in Table SCH-8, a new residential development with 100 homes will generate 6 elementary, 3 middle, and 5 high school students. Using the K-12 Total would generate 15 students.

**PROJECTED PUBLIC SCHOOL FACILITY CONDITIONS**

**Projected Enrollment**

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

School population projections are most reliable when enrollment is projected for large geographic areas for one or two years in the future. For example, the district-wide projections for next year are expected to have a higher degree of certainty than the fifth year estimates. Conversely,



accuracy diminishes as the geographic area becomes smaller and the forecast is for more distant points in the future.

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

**The DOE Forecast**

Around June of each year, the Florida DOE publishes grade by grade Capital Outlay Full Time Equivalency (COFTE) enrollment projections for every school district. The State uses a standard ‘cohort survival’ method using five-year enrollment trends. The State’s projections are an average of two ‘head counts,’ one in October and one in February. Table SCH-9 summarizes data provided by the Florida Department of Education (DOE) and displays the population projections and projected student growth through the school year 2019/20. According to the projections of the DOE, student population is expected to decrease at a steady rate through 2011/12. The DOE enrollment projections for school year 2017/18 show the student population growing at a slow rate, adding 811 students between 2012/13 and 2019/20.

Table SCH-9: District Enrollment Projection Comparisons			
School Year	DOE COFTE	Change from Previous Year	Decrease/Increase
2008/09	16,736	-481	Decrease
2009/10	16,424	-312	Decrease
2010/11	16,127	-296	Decrease
2011/12	15,903	-223	Decrease
2012/13	15,952	49	Increase
2013/14	15,956	4	Increase
2019/20	16,715	245	Increase

Source: Florida Department of Education, July, 2009.

Table SCH-9 identifies the District’s annual enrollment projections by grade level, pre-K through grade 12 as prepared by the DOE through school year 2013-2014 and 2019-2020.

**Use of COFTE Projections**

Using the COFTE enrollment projections poses three issues for facilities planning, as follows:

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

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

Finally, the State forecast is based on historic trends and not on local knowledge. If there is a change in the trend, the State forecast will lag behind. Consequently, the State's COFTE forecast (displayed in Table SCH-10) is used in conjunction with the School District's enrollment forecast as a comparison of student projections, especially for the short-term planning horizon.

Table SCH-10: 2009 DOE Capital Outlay FTE Forecast

Charlotte Total 2009 Capital Outlay FTE Forecast														
Grade	Actual 2006-07	Actual 2007-2008	Actual 2008-2009	Projected 2009-2010	Projected 2010-2011	Projected 2011-2012	Projected 2012-2013	Projected 2013-2014	Projected 2014-2015	Projected 2015-2016	Projected 2016-2017	Projected 2017-2018	Projected 2018-2019	Projected 2019-2020
Lagged Birth Data for K	1,058	976	1,056	1,028	1,106	1,161	1,193	1,193	1,197	1,208	1,224	1,234	1,248	1,266
PreK	110.39	123.63	145.68	133.16	160.70	162.88	163.16	164.18	166.02	167.80	169.44	171.62	174.22	176.81
Grade K	1,133.37	1,113.19	1,023.93	1,030.00	1,041.65	1,095.51	1,130.77	1,136.93	1,144.77	1,159.10	1,174.87	1,184.10	1,198.02	1,214.64
Grade 1	1,193.40	1,162.04	1,144.05	1,060.00	1,057.30	1,073.93	1,133.05	1,175.46	1,189.02	1,202.38	1,217.31	1,234.74	1,243.35	1,258.85
Grade 2	1,174.24	1,179.41	1,143.55	1,145.42	1,045.47	1,045.58	1,067.21	1,131.24	1,180.83	1,202.23	1,215.97	1,230.31	1,248.23	1,257.08
Grade 3	1,228.84	1,181.53	1,182.56	1,162.00	1,149.72	1,065.43	1,069.82	1,101.64	1,176.52	1,242.00	1,266.73	1,282.69	1,298.25	1,316.44
Grade 4	1,151.01	1,177.80	1,119.92	1,134.96	1,101.28	1,092.00	1,015.86	1,022.15	1,055.32	1,129.53	1,193.24	1,216.43	1,231.69	1,246.54
Grade 5	1,280.47	1,151.50	1,193.50	1,140.00	1,149.91	1,119.05	1,111.97	1,036.39	1,045.07	1,081.42	1,156.75	1,222.28	1,246.13	1,261.82
Grade 6	1,307.53	1,385.54	1,248.80	1,287.27	1,236.33	1,249.32	1,217.97	1,212.44	1,132.05	1,142.57	1,182.34	1,264.77	1,337.48	1,363.58
Grade 7	1,281.38	1,345.48	1,419.56	1,268.47	1,319.09	1,266.65	1,279.56	1,247.18	1,240.18	1,158.75	1,169.49	1,210.09	1,293.25	1,368.48
Grade 8	1,472.06	1,284.50	1,359.32	1,440.53	1,282.40	1,333.93	1,282.07	1,296.43	1,265.81	1,259.92	1,177.13	1,188.05	1,229.33	1,312.88
Grade 9	1,550.39	1,556.89	1,380.03	1,428.03	1,546.54	1,378.88	1,434.40	1,380.73	1,396.31	1,364.42	1,358.07	1,268.83	1,280.60	1,325.09
Grade 10	1,550.19	1,521.88	1,523.91	1,314.07	1,397.37	1,503.41	1,331.67	1,374.86	1,315.00	1,320.55	1,290.30	1,284.28	1,199.62	1,210.79
Grade 11	1,548.65	1,522.89	1,462.54	1,506.17	1,265.84	1,345.53	1,452.49	1,295.35	1,339.45	1,286.52	1,290.87	1,261.72	1,255.91	1,174.31
Grade 12	1,298.36	1,492.18	1,389.30	1,374.26	1,373.79	1,171.45	1,262.96	1,381.91	1,248.94	1,309.63	1,258.09	1,262.41	1,233.47	1,227.70
	<b>17,280.28</b>	<b>17,198.46</b>	<b>16,736.65</b>	<b>16,424.34</b>	<b>16,127.39</b>	<b>15,903.55</b>	<b>15,952.96</b>	<b>15,956.89</b>	<b>15,895.29</b>	<b>16,026.82</b>	<b>16,120.60</b>	<b>16,282.32</b>	<b>16,469.55</b>	<b>16,715.01</b>
		(81.82)	(461.81)	(312.31)	(296.95)	(223.84)	49.41	3.93	(61.60)	131.53	93.78	161.72	187.23	245.46
<b>Grade Level Summary</b>														
PreK-5	7,271.72	7,089.10	6,953.19	6,805.54	6,706.03	6,654.38	6,691.84	6,767.99	6,957.55	7,184.46	7,394.31	7,542.17	7,639.89	7,732.18
6-8	4,060.97	4,015.52	4,027.68	3,996.27	3,837.82	3,849.90	3,779.60	3,756.05	3,638.04	3,561.24	3,528.96	3,662.91	3,860.06	4,044.94
9-12	5,947.59	6,093.84	5,755.78	5,622.53	5,583.54	5,399.27	5,481.52	5,432.85	5,299.70	5,281.12	5,197.33	5,077.24	4,969.60	4,937.89
PreK - G12	<b>17,280.28</b>	<b>17,198.46</b>	<b>16,736.65</b>	<b>16,424.34</b>	<b>16,127.39</b>	<b>15,903.55</b>	<b>15,952.96</b>	<b>15,956.89</b>	<b>15,895.29</b>	<b>16,026.82</b>	<b>16,120.60</b>	<b>16,282.32</b>	<b>16,469.55</b>	<b>16,715.01</b>
<b>Growth Summary *</b>														
PreK-5	-	-	-	-	-	-	-	61.96	189.56	226.91	209.85	147.86	97.72	92.29
6-8	-	-	-	-	-	-	-	-	-	-	-	24.87	197.15	184.88
9-12	-	-	-	-	-	-	-	-	-	-	-	-	-	-
PreK - G12	-	-	-	-	-	-	-	61.96	189.56	226.91	209.85	172.73	294.87	277.17

**Local Forecast**

The enrollment projections are prepared in the fall of each year by School District staff. Enrollment in Charlotte County schools began to decline beginning in the 2008 school year and is expected to decline through the 2014 school year. The enrollment numbers of the District include students served in the various programs operated by the District. Some of which, like the Head Start program, are not eligible for COFTE.

**Comparison to the State DOE COFTE Forecast**

In 2007, the State forecast projected large and steady increases for Charlotte County based on trends established in 2005-2006 and earlier. The State forecast for 2008 was reduced from the 2007 estimates, and were reduced significantly again in the 2009 forecast. The local forecast showed slow growth from in-migration and slightly increasing births. However, the number of incoming Kindergarteners is always exceeded by the number of graduating seniors, resulting in the continuing decline in enrollment. Every year the forecasts are updated to reflect the most recent information on births, housing, and grade level changes.

**Projected Capacity (Surpluses and Deficiencies)**

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

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

The Charlotte County School District has chosen to use Total FISH capacity, including student stations in district owned and leased relocatables. It is the School District's policy to eliminate the use of temporary classroom facilities over time, converting the space to permanent capacity when possible. Relocatables will be used only as a temporary operational solution. The utilization percentage of a school is determined by dividing the student enrollment by the school's capacity.



The School District's school utilization is provided in Table SCH-11, which displays both the current and projected utilization calculations per school and by school type through school year 2013/14 and for the 2018/19 school year, taking into account any permanent additions or new schools.

Table SCH-11: Charlotte County School District Utilization SY 2018-19

SCHOOL NAME	Total FISH Capacity	SY 09/10			SY 10/11			SY 11/12			SY 12/13			SY 13/14			SY 18/19		
		Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.
<b>Elementary Schools</b>																			
Myakka River	667	586	667	88%	602	667	90%	602	667	90%	602	667	90%	602	667	90%	580	667	87%
Vineland	880	731	880	83%	707	880	80%	707	880	80%	707	880	80%	707	880	80%	668	880	76%
Deep Creek	884	788	884	89%	756	884	86%	756	884	86%	756	884	86%	756	884	86%	756	884	86%
Kingsway	732	666	732	91%	679	732	93%	679	732	93%	679	732	93%	679	732	93%	675	732	92%
Peace River	861	655	861	76%	678	861	79%	678	861	79%	678	861	79%	678	861	79%	701	861	81%
Neil Armstrong	861	743	861	86%	804	861	93%	804	861	93%	804	861	93%	804	861	93%	800	861	93%
Liberty	745	718	745	96%	720	745	97%	700	745	94%	700	745	94%	700	745	94%	700	745	94%
Meadow Park	799	690	799	86%	486	799	61%	486	799	61%	486	799	61%	486	799	61%	675	799	84%
Sallie Jones	717	695	717	97%	703	717	98%	683	717	95%	683	717	95%	683	717	95%	680	717	95%
East	861	596	861	69%	612	861	71%	612	861	71%	612	861	71%	612	861	71%	600	861	70%
New Elementary School "A" (2016)		*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	700	861	81%
<b>Total</b>	<b>8007</b>	<b>6868</b>	<b>8007</b>	<b>86%</b>	<b>6747</b>	<b>8007</b>	<b>84%</b>	<b>6707</b>	<b>8007</b>	<b>84%</b>	<b>6707</b>	<b>8007</b>	<b>84%</b>	<b>6707</b>	<b>8007</b>	<b>84%</b>	<b>7535</b>	<b>8868</b>	<b>85%</b>
<b>Middle Schools</b>																			
L.A. Ainger	1023	959	1023	94%	896	1023	88%	896	1023	88%	896	1023	88%	896	1023	88%	896	1023	88%
Murdock Middle	880	915	880	104%	869	880	99%	825	880	94%	825	880	94%	825	880	94%	825	880	94%
Port Charlotte Middle	1021	840	1021	82%	784	1021	77%	784	1021	77%	784	1021	77%	784	1021	77%	784	1021	77%
Punta Gorda Middle	1243	1171	1243	94%	1101	1243	89%	1101	1243	89%	1101	1243	89%	1101	1243	89%	1101	1243	89%
<b>Total Middle</b>	<b>4167</b>	<b>3885</b>	<b>4167</b>	<b>93%</b>	<b>3650</b>	<b>4167</b>	<b>88%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>
<b>High Schools</b>																			
Lemon Bay High	1567	1370	1567	87%	1332	1567	85%	1332	1567	85%	1350	1567	86%	1400	1567	89%	1350	1567	86%
Port Charlotte High	2006	2024	2006	101%	1904	2006	95%	1904	2006	95%	1900	2006	95%	1900	2006	95%	1800	2006	90%
Charlotte High	3160	1981	3160	63%	1941	3160	61%	1900	1846	103%	1825	1846	99%	1750	1846	95%	1750	1846	95%
<b>Total High School</b>	<b>6733</b>	<b>5375</b>	<b>6733</b>	<b>80%</b>	<b>5177</b>	<b>6733</b>	<b>77%</b>	<b>5136</b>	<b>5419</b>	<b>95%</b>	<b>5075</b>	<b>5419</b>	<b>94%</b>	<b>5050</b>	<b>5419</b>	<b>93%</b>	<b>4900</b>	<b>5419</b>	<b>90%</b>
<b>Combination / Other</b>																			
The Academy	441	332	441	75%	352	441	80%	352	441	80%	352	441	80%	352	441	80%	350	441	79%
Charlotte Harbor Center	215	144	215	67%	140	215	65%	140	215	65%	140	215	65%	140	215	65%	140	215	65%
Baker Pre-K Center	324	201	324	62%	220	324	68%	220	324	68%	220	324	68%	220	324	68%	220	324	68%
Charlotte Technical Center	800	730	800	91%	730	800	91%	730	800	91%	730	800	91%	730	800	91%	730	800	91%
<b>Total Other</b>	<b>1780</b>	<b>1407</b>	<b>1780</b>	<b>79%</b>	<b>1442</b>	<b>1780</b>	<b>81%</b>	<b>1442</b>	<b>1780</b>	<b>81%</b>	<b>1442</b>	<b>1780</b>	<b>81%</b>	<b>1442</b>	<b>1780</b>	<b>81%</b>	<b>1440</b>	<b>1780</b>	<b>81%</b>
<b>Student Total</b>	<b>20687</b>	<b>17535</b>	<b>20687</b>	<b>85%</b>	<b>17016</b>	<b>20687</b>	<b>82%</b>	<b>16891</b>	<b>19373</b>	<b>87%</b>	<b>16830</b>	<b>19373</b>	<b>87%</b>	<b>16805</b>	<b>19373</b>	<b>87%</b>	<b>17481</b>	<b>20234</b>	<b>86%</b>
<b>DOE Capital Outlay FTE Forecast</b>		<b>16424</b>	<b>20687</b>	<b>79%</b>	<b>16127</b>	<b>20687</b>	<b>78%</b>	<b>15904</b>	<b>19373</b>	<b>82%</b>	<b>15952</b>	<b>19373</b>	<b>82%</b>	<b>15957</b>	<b>19373</b>	<b>82%</b>	<b>16470</b>	<b>20234</b>	<b>81%</b>

Source: Charlotte County School District

**Educational Facilities Survey**

One of the main documents used to plan for new educational facilities is the Educational Facilities Survey. The Educational Facilities Survey is prepared once every five years and is a systematic study of present educational and ancillary facilities and is used for determining future capital needs. This Educational Facility Survey is used as a reference when formulating the 5-Year District Facilities Work Program (Public School Facilities Data and Analysis Appendix A), which is updated and adopted annually. With each annual update to the Work Program, the District reviews the existing and projected student growth and plans for the additional capacity necessary to support the growth. SFAM Series Map #5 in SCH Appendix 1 identifies the location of property owned by the School District and the potential locations of future schools.

**School Facilities Long Range Plan (Ten-Year and Twenty-Year)**

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

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

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

As of October 2007, the Charlotte County School District had approximately 16,820 students in grades kindergarten through 12. By 2018 this number is projected to grow to 16,799 students. Table SCH-12 shows the projected enrollment thru 2019 by grade level.

<b>Table SCH-12: Enrollment Forecast Thru 2019</b>	
<b>Grade Level</b>	<b>FY 2018 Projected Enrollment</b>
<b>Elementary</b>	7,395
<b>Middle</b>	4,045
<b>High</b>	5,050
<b>Combination / Other</b>	309
<b>Total</b>	16,799

Source: Charlotte County School District



To accommodate future growth identified outside of the current five-year planning period, several capacity projects have been identified. Although this new capacity is subject to modification based on changes actual need (timing, location, school type), the current proposed locations of these new schools are shown in SFAM Series Map #5 in SCH Appendix 1.

**PUBLIC SCHOOL FACILITY SUMMARY**

New development, class size reduction and special school programs create circumstances that impact the capacity available at schools to accommodate new students. Table SCH-11 identifies the available capacity (utilization) at each school for the five-year planning period. To maintain an overall utilization of less than 100%, the School District has several options. These include monitoring programs, building additional permanent classrooms at existing schools or planning capacity for new schools. As a rule of thumb, the School District estimates the land area requirements for new school facilities to be twenty acres for elementary schools, twenty-five acres for middle schools, and fifty acres for high schools. These acreage estimates are very general in nature, and can vary significantly based on factors such as property location, land configuration and on-site infrastructure needs. Ancillary facilities do not have a prescribed size requirement. The following identifies the changes planned by school type:

**Elementary Schools**

Ten elementary schools are currently operated by the Charlotte County School District. The School District anticipates that two new elementary schools will be needed within the next ten years. Based on the projected need, these new schools are planned to open in school years 2017 and 2020, and will accommodate an additional 887 student stations each. Concurrent with the opening of new schools, boundaries will be re-drawn to reduce capacity at schools currently needing enrollment relief.

**Middle Schools**

The School District currently operates four middle schools. Based on the current projections at the middle school level, the School District has no plans for any new middle schools.

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

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

**Ancillary Facilities**

The School District has five ancillary facilities. These facilities include: Murdock Center (District Administration Offices), Punta Gorda Center (District Support Services), Murdock Transportation/Maintenance Compound, Punta Gorda Transportation/Maintenance Compound,

and West County Transportation/Maintenance Compound. No additional facilities are required for the foreseeable future.

**LEVEL OF SERVICE STANDARDS**

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

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

**School LOS for Charlotte County**

As adopted in the ILA, Charlotte County, the City of Punta Gorda and the School District have established an LOS for each school type, using Total FISH as a capacity measure for existing schools based on the School Districts financially feasible 5-Year District Facilities Work Program (Public School Facilities Data and Analysis Appendix A). Table SCH-13 below indicates the LOS for each type of school.

<b>Table SCH-13: School LOS</b>	
<b>Type of School</b>	<b>LOS</b>
<b>Elementary</b>	95%
<b>Middle</b>	100%
<b>High</b>	100%

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

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

### **SCHOOL CONCURRENCY SERVICE AREAS (CSA)**

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

The legislature allows school concurrency to be applied district-wide initially, but requires that it be applied on a less than district-wide basis within five years of adoption (Chapter 163.3180(13)(c)1, F.S.). When applying school concurrency less than district-wide, the school district is required to maximize utilization of their schools and to apply “adjacency” when reviewing residential development.

Maximizing utilization requires the School District to evaluate school enrollment and attempt to balance the enrollment by shifting children from schools that are over capacity to schools that are under capacity to the greatest extent possible. To ensure the School District is maximizing utilization of schools to the greatest extent possible, new residential development can take into consideration adjacent CSA capacity when none exists in the directly impacted service area (adjacency).

#### **School CSAs for Charlotte County**

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

Using separate CSAs for the elementary, middle and high schools allows the impact of new residential development to be analyzed and determined at each type of school. The review for available capacity will also occur at the schools most likely to be impacted by the new residential development. If available capacity is not present, the adjacent school CSA will be analyzed for capacity. SFAM Series Maps #6, #7, and #8 in SCH Appendix 1 identify the CSA boundaries. The corresponding utilization Tables SCH-14a, SCH-14b, and SCH-14c show the overall utilization of each CSA for the five-year planning period.

Table SCH-14a: Elementary School Utilization by Concurrency Service Area

SCHOOL NAME	Total FISH Capacity	SY 09/10			SY 10/11			SY 11/12			SY 12/13			SY 13/14			SY 18/19		
		Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.
<b>CSA 1</b>																			
Vineland	880	731	880	83%	707	880	80%	707	880	80%	707	880	80%	707	880	80%	668	880	76%
<b>CSA 2</b>																			
Myakka River	667	586	667	88%	602	667	90%	602	667	90%	602	667	90%	602	667	90%	580	667	87%
<b>CSA 3</b>																			
Liberty	745	718	745	96%	720	745	97%	700	745	94%	700	745	94%	700	745	94%	700	745	94%
<b>CSA 4</b>																			
Meadow Park	799	690	799	86%	486	799	61%	486	799	61%	486	799	61%	486	799	61%	675	799	84%
<b>CSA 5</b>																			
Neil Armstrong	861	743	861	86%	804	861	93%	804	861	93%	804	861	93%	804	861	93%	800	861	93%
<b>CSA 6</b>																			
Peace River	861	655	861	76%	678	861	79%	678	861	79%	678	861	79%	678	861	79%	701	861	81%
<b>CSA 7</b>																			
Kingsway	732	666	732	91%	679	732	93%	679	732	93%	679	732	93%	679	732	93%	675	732	92%
<b>CSA 8</b>																			
Deep Creek	884	788	884	89%	756	884	86%	756	884	86%	756	884	86%	756	884	86%	756	884	86%
<b>CSA 9</b>																			
Sallie Jones	717	695	717	97%	703	717	98%	683	717	95%	683	717	95%	683	717	95%	680	717	95%
<b>CSA 10</b>																			
East	861	596	861	69%	612	861	71%	612	861	71%	612	861	71%	612	861	71%	600	861	70%
<b>CSA to be assigned</b>																			
New Elementary School "A" (2016)		*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	700	861	81%
<b>Total Elementary Schools</b>	<b>8007</b>	<b>6868</b>	<b>8007</b>	<b>86%</b>	<b>6747</b>	<b>8007</b>	<b>84%</b>	<b>6707</b>	<b>8007</b>	<b>84%</b>	<b>6707</b>	<b>8007</b>	<b>84%</b>	<b>6707</b>	<b>8007</b>	<b>84%</b>	<b>7535</b>	<b>8868</b>	<b>85%</b>

Source: Charlotte County School District



Table SCH-14b: Middle School Utilization by Concurrency Service Area

SCHOOL NAME	Total FISH Capacity	SY 09/10			SY 10/11			SY 11/12			SY 12/13			SY 13/14			SY 18/19		
		Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.
<b>Middle Schools</b>																			
L.A. Ainger	1023	959	1023	94%	896	1023	88%	896	1023	88%	896	1023	88%	896	1023	88%	896	1023	88%
Murdock Middle	880	915	880	104%	869	880	99%	825	880	94%	825	880	94%	825	880	94%	825	880	94%
Port Charlotte Middle	1021	840	1021	82%	784	1021	77%	784	1021	77%	784	1021	77%	784	1021	77%	784	1021	77%
Punta Gorda Middle	1243	1171	1243	94%	1101	1243	89%	1101	1243	89%	1101	1243	89%	1101	1243	89%	1101	1243	89%
<b>Total Middle Schools</b>	<b>4167</b>	<b>3885</b>	<b>4167</b>	<b>93%</b>	<b>3650</b>	<b>4167</b>	<b>88%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>	<b>3606</b>	<b>4167</b>	<b>87%</b>
<b>Middle School CSA 1</b>																			
L.A. Ainger	1023	959	1023	94%	896	1023	88%	896	1023	88%	896	1023	88%	896	1023	88%	896	1023	88%
<b>Total Middle CSA 1</b>	<b>5410</b>	<b>959</b>	<b>1023</b>	<b>94%</b>	<b>896</b>	<b>1023</b>	<b>88%</b>	<b>896</b>	<b>1023</b>	<b>88%</b>	<b>896</b>	<b>1023</b>	<b>88%</b>	<b>896</b>	<b>1023</b>	<b>88%</b>	<b>896</b>	<b>1023</b>	<b>88%</b>
<b>Middle School CSA 2</b>																			
Murdock Middle	880	915	880	104%	869	880	99%	825	880	94%	825	880	94%	825	880	94%	825	880	94%
<b>Total Middle CSA 2</b>	<b>6433</b>	<b>915</b>	<b>880</b>	<b>104%</b>	<b>869</b>	<b>880</b>	<b>99%</b>	<b>825</b>	<b>880</b>	<b>94%</b>	<b>825</b>	<b>880</b>	<b>94%</b>	<b>825</b>	<b>880</b>	<b>94%</b>	<b>825</b>	<b>880</b>	<b>94%</b>
<b>Middle School CSA 3</b>																			
Port Charlotte Middle	1021	840	1021	82%	784	1021	77%	784	1021	77%	784	1021	77%	784	1021	77%	784	1021	77%
<b>Total Middle CSA 3</b>	<b>7313</b>	<b>840</b>	<b>1021</b>	<b>82%</b>	<b>784</b>	<b>1021</b>	<b>77%</b>	<b>784</b>	<b>1021</b>	<b>77%</b>	<b>784</b>	<b>1021</b>	<b>77%</b>	<b>784</b>	<b>1021</b>	<b>77%</b>	<b>784</b>	<b>1021</b>	<b>77%</b>
<b>Middle School CSA 4</b>																			
Punta Gorda Middle	1243	1171	1243	94%	1101	1243	89%	1101	1243	89%	1101	1243	89%	1101	1243	89%	1101	1243	89%
<b>Total Middle CSA 4</b>	<b>8334</b>	<b>1171</b>	<b>1243</b>	<b>94%</b>	<b>1101</b>	<b>1243</b>	<b>89%</b>	<b>1101</b>	<b>1243</b>	<b>89%</b>	<b>1101</b>	<b>1243</b>	<b>89%</b>	<b>1101</b>	<b>1243</b>	<b>89%</b>	<b>1101</b>	<b>1243</b>	<b>89%</b>

Source: Charlotte County School District



Table SCH-14c: High School Utilization by Concurrency Service Area

SCHOOL NAME	Total FISH Capacity	SY 09/10			SY 10/11			SY 11/12			SY 12/13			SY 13/14			SY 18/19		
		Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.	Enroll.	Cap.	Util.
<b>High Schools</b>																			
Lemon Bay High	1567	1370	1567	87%	1332	1567	85%	1332	1567	85%	1350	1567	86%	1400	1567	89%	1350	1567	86%
Port Charlotte High	2006	2024	2006	101%	1904	2006	95%	1904	2006	95%	1900	2006	95%	1900	2006	95%	1800	2006	90%
Charlotte High	3160	1981	3160	63%	1941	3160	61%	1900	1846	103%	1825	1846	99%	1750	1846	95%	1750	1846	95%
<b>Total High Schools</b>	<b>6733</b>	<b>5375</b>	<b>6733</b>	<b>80%</b>	<b>5177</b>	<b>6733</b>	<b>77%</b>	<b>5136</b>	<b>5419</b>	<b>95%</b>	<b>5075</b>	<b>5419</b>	<b>94%</b>	<b>5050</b>	<b>5419</b>	<b>93%</b>	<b>4900</b>	<b>5419</b>	<b>90%</b>
<b>High School CSA 1</b>																			
Lemon Bay High	1567	1370	1567	87%	1332	1567	85%	1332	1567	85%	1350	1567	86%	1400	1567	89%	1350	1567	86%
<b>Total High CSA 1</b>	<b>9893</b>	<b>1370</b>	<b>1567</b>	<b>87%</b>	<b>1332</b>	<b>1567</b>	<b>85%</b>	<b>1332</b>	<b>1567</b>	<b>85%</b>	<b>1350</b>	<b>1567</b>	<b>86%</b>	<b>1400</b>	<b>1567</b>	<b>89%</b>	<b>1350</b>	<b>1567</b>	<b>86%</b>
<b>High School CSA 2</b>																			
Port Charlotte High	2006	2024	2006	101%	1904	2006	95%	1904	2006	95%	1900	2006	95%	1900	2006	95%	1800	2006	90%
<b>Total High CSA 2</b>	<b>11460</b>	<b>2024</b>	<b>2006</b>	<b>101%</b>	<b>1904</b>	<b>2006</b>	<b>95%</b>	<b>1904</b>	<b>2006</b>	<b>95%</b>	<b>1900</b>	<b>2006</b>	<b>95%</b>	<b>1900</b>	<b>2006</b>	<b>95%</b>	<b>1800</b>	<b>2006</b>	<b>90%</b>
<b>High School CSA 3</b>																			
Charlotte High	3160	1981	3160	63%	1941	3160	61%	1900	1846	103%	1825	1846	99%	1750	1846	95%	1750	1846	95%
<b>Total High CSA 3</b>	<b>13466</b>	<b>1981</b>	<b>3160</b>	<b>63%</b>	<b>1941</b>	<b>3160</b>	<b>61%</b>	<b>1900</b>	<b>1846</b>	<b>103%</b>	<b>1825</b>	<b>1846</b>	<b>99%</b>	<b>1750</b>	<b>1846</b>	<b>95%</b>	<b>1750</b>	<b>1846</b>	<b>95%</b>

Source: Charlotte County Public Schools

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## CO-LOCATION/JOINT USE ANALYSIS

Co-location and joint use of facilities are required as portions of the data and analysis requirement of Rule 9J-5.025, F.A.C for the Public School Facility Element. The ILA requires consideration of co-location and shared use in Section 9 of the Agreement. The co-location or joint use of facilities enhances the ability of schools to serve as community focal points, and provides local governments and the School District an opportunity to realize a financial savings by sharing facilities. SFAM Series Map #9 in SCH Appendix I identifies the location of public facilities or sites in Charlotte County that could be used for co-location or joint use of facilities.

### **Budget Considerations**

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

### **Public Opportunity**

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

### **School Opportunity**

The School District would benefit from joint use of parks adjacent to or in the vicinity of public schools. This includes the shifting of recreational facilities to adjacent parks to reduce maintenance costs or the amount of property needed to accommodate the new school. As shown in SFAM Series Map #9, there are several opportunities for joint use of existing facilities and proposed school sites. Potential sites for future schools have not been yet been determined by the School District beyond the twenty-year planning period.

### **Development Opportunity**

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

and libraries near existing or planned public schools to serve both the existing and future residents of the County.

### **Mutual Use Agreements**

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

### **Emergency Preparedness**

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

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

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

## **SCHOOL DISTRICT CAPITAL IMPROVEMENTS AND REVENUE SOURCES**

The School District's 5-Year Tentative Facilities Work Program is the foundation of an annual planning process that allows the School District to effectively address changing enrollment patterns, development, and growth. It is updated and adopted each year, and provides details of district-wide capital improvement needs, funding availability and a proposed schedule for addressing the improvements. Identified in the Work Program are proposed projects that are needed to address existing and future projected capacity needs.

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

The 5-Year District Facilities Work Program, shown in Public School Facilities Data and Analysis Appendix A, provides a listing of the School District's Capacity Project Schedules over the five-year planning period, adopted by the Charlotte County School Board in September 2009. It provides the schedule of capital outlay projects, and the expenditures for each school, necessary to ensure the availability of satisfactory classrooms for the projected student enrollment in K-12 programs for a five-year planning period. The 5-Year District Facilities Work Program also includes project descriptions of major renovations, remodeling projects, and additions of capital outlay projects that do not add capacity to schools.

### **Ten-Year and Twenty-Year Projects**

The long-range planning for the School District includes the projects and locations scheduled for major renovation, repair, and maintenance projects within the School District in years 6-10 beyond the project plans detailed in the five years covered by the Capital Improvements Plan. The schedule of capital outlay projects projected to ensure the availability of satisfactory student stations for the projected student enrollment in K-12 programs for the future five years are displayed in Public School Facilities Data and Analysis Appendix A.

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

### **School District Revenue Sources**

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

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



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

The School District has the legal authority to utilize up to 1.5 mills of the 2.0 capital tax to fund the debt service or COP issues. In general, funding available from State and local sources, including the issuance of long-term debt and the continuation of school impact fees, will be evaluated annually to determine the financial feasibility of the capital plan in order to meet the long-term concurrency management plan of the School District. The 5-Year District Facilities Work Program in Public School Facilities Data and Analysis Appendix A gives a comprehensive view of estimated revenue sources and estimated annual revenue for the next five to ten years.

The Program also shows the School District’s planned capital expenditures and revenues for new construction and remodeling projects only over the five year period from 2009/10-2013/14. The 5-Year District Facilities Work Program demonstrates financial feasibility, as the total costs do not exceed the total revenues over the five-year planning period.

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

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

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

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

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

### **School District Capital Improvements Summary**

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

Florida law requires that the public school LOS standards be adopted into each respective local government's CIE, and must apply to all schools of the same type (elementary, middle and high) and must be maintained within each CSA. Charlotte County's 5-Year District Facilities Work Program, as developed for the CSA as proposed, will fully achieve and maintain the adopted LOS in each CSA during the five-year planning period. The annual adoption of the 5-Year District Facilities Work Program provides continuity for short-term and long-term planning purposes, and is examined at the annual Joint City/County/School Board Workshop as required by the ILA.