



# 16/17 Five-year Capital Improvement Plan



### **THE SCHOOL BOARD OF SARASOTA COUNTY, FLORIDA**

Ms. Shirley Brown, Chair – District 4

Ms. Caroline Zucker, Vice Chair – District 2

Ms. Bridget Ziegler – District 1

Mr. Frank Kovach – District 3

Ms. Jane Goodwin – District 5

Ms. Lori White, Superintendent of Schools

Scott Lempe, Deputy Superintendent of Schools

Kathie Ebaugh, AICP, Director of Planning

Micki Ryan, Senior Planner

Diane Cominotti, Planner

### **BOARD VISION**

The School District of Sarasota County places learning at the center of its activities to enable all learners to lead productive, responsible, and healthful lives.

### **SCHOOL BOARD MISSION**

The School District of Sarasota County prepares students to achieve the highest learning standards by engaging a high quality staff, involving parents, and a supportive community.

# Table of Contents

Chapter 1: Planning Overview.....	Page 5
Chapter 2: Goals and Policies .....	Page 13
Chapter 3: Key Planning Issues.....	Page 21
Chapter 4: Five-year CIP Projects .....	Page 25
Chapter 5: Conclusion and Appendixes.....	Page 55
1. County Demographics	
2. Capital Planning Process	
3. Condition Assessment Tools	
4. School Planning State Regulatory Framework	
5. Glossary	





## **Chapter 1: Planning Overview**

*A Tradition of Academic Excellence*

## **Introduction**

Recognized as one of the top school districts in the State of Florida, Sarasota County Schools (the District) provides educational services for over 42,000 traditional public school students living in Sarasota County (the County) and its four local municipalities—Longboat Key, North Port, Sarasota, and Venice. The District’s educational services meet a wide-range of educational and workforce development needs including traditional K-12 public school services at the 37 elementary, middle, and high schools; a gifted school for students in grades 2-12; a special needs school for students from Pre-K-12; and workforce and technical programs at Suncoast Technical College. Through these schools, the District produces graduates that are college or career ready.

In order to meet the current and future educational needs of the County, Sarasota County Schools must continually plan for the development, maintenance, and improvement of the District’s capital resources and facilities. The 2016/2017 Five-year Capital Improvement Plan (CIP) ensures that the District provides the excellent educational services for residents and businesses by planning for current and future capital needs. The CIP plans for future school capital needs by: 1) confirming School Board planning goals and strategies, 2) assessing the condition of existing school facilities and capital resources, 3) evaluating current student needs and future enrollment demands, and 4) prioritizing capital improvement projects for funding through the capital budget. By planning for capital facility needs and demands, the CIP helps Sarasota County Schools ensure that they will have the facilities to continue providing for the excellent educational services the citizens and businesses of Sarasota County expect.

## **2016/17 Planning Goals**

The foundation of the District’s capital planning efforts are the School Board’s five adopted planning goals. These goals are fundamental components of the CIP as they help establish the basis upon which the CIP is developed. The goals provide direction about how future projects are to be assessed; identify what data needs to be evaluated; and set priorities for future planning efforts and projects.

The 2016/17 Planning Goals are:

### **Goal 1: Education Services Planning and School Capacity Facilities .**

Ensure that current and future educational service needs are met through planning efforts that provide for current student populations, prepare for future student demands, and provide for the overall educational facility needs of Sarasota County in order to meet the needs and demands of current and future residents and businesses.

### **Goal 2: Asset Preservation.**

Protect the district’s capital investments through well managed operations systems that establish best management practices for maintaining, renovating, or replacing the district’s capital assets—e.g.: facilities, systems, equipment, transportation equipment, and other resources.

### **Goal 3: Safety and Security.**

Support the academic success of each child with a comprehensive safety and security program and services that effectively uses security technologies and infrastructure aligned with campus security and emergency management best practices.

### **Goal 4: Technology.**

Implement and support technology infrastructure to ensure students and staff have anytime, anywhere access to the latest educational technology and resources.

### **Goal 5: Capital Improvement Funding.**

Execute a capital improvement financing strategy that plans, maintains, and provides for the delivery of highly valued, well managed, and fiscally responsible educational services and infrastructure system.

By helping define the district’s capital planning directives and priorities, these goals give staff guidance about how to plan and budget for future capital improvement projects. As such, each project considered for capital funding in the Five-year CIP, is evaluated based upon whether it addresses or fulfills the School Board’s adopted capital planning goals.

### **Condition Assessment**

The Board’s capital improvement goals are objectively applied to each school facility through the use of a Capital Projects Matrix applied at the campus level and a Facilities Condition Index applied at the building level (Table 1). These planning tools enable staff to quantify whether a capital project accomplishes the Board’s goals by assisting with the physical evaluation of proposed capital projects. The Matrix and FCI help determine which facilities are in need of major repairs, expansion, or improvement by assessing issues related to a school facility’s capacity, age, condition, cost of maintenance and repairs, and level of security. Facilities that have high Matrix or FCI numbers provide the impetus for further evaluating whether such projects should receive CIP funding. If you look at a previous years’ Matrix (Appendix 2), you will see that these documents have driven the CIP program with improvements made to Venice High School, Booker High School, and STC-Main Campus. As a result of the evaluation of the current documents, specific projects that have been deemed to achieve the Board’s planning goals and have been placed on this year’s CIP include: Brentwood Elementary cafeteria and campus refresh, Venice Middle School HVAC and campus refresh, Sarasota High School rebuild, Pine View classroom wing and core capacity expansion, Gocio Elementary classroom wing, and Englewood Elementary classroom wing.

Table 1: Capital Projects Matrix—Top 10 Assessment

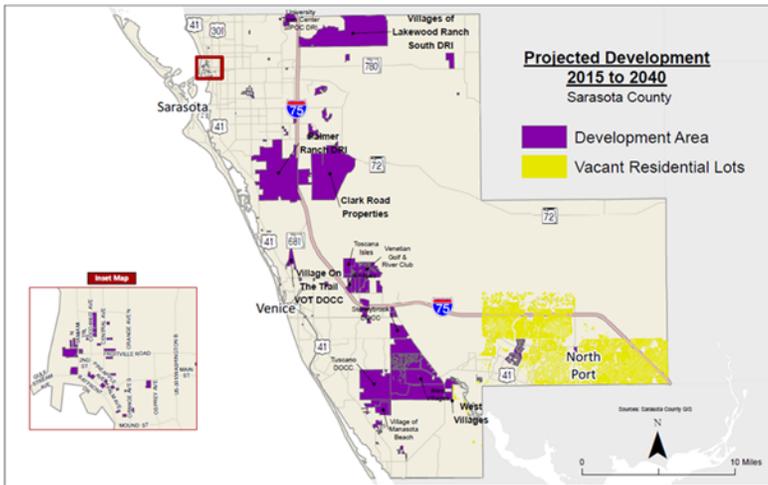
School	Signif Capacity Needs	Duration of Over-Capacity	Projected 5-Year Core Status	Cost of Maint. Projects Pending	Utility Costs	Past Five Years' Capital Invest	Facility Condition Index	2016 Security CPTED Analysis	2016 Total
School	Signif	Duration	Projected	Cost of	Utility	Past Five	Facility	2016	2016
Pine View	2	3	9	20	6	6	16	15	77
Venice MS	2	0	0	20	4	10	12	15	63
Brentwood	0	0	0	20	4	10	20	0	54
Lakeview	3	5	6	0	8	8	8	15	53
Fruitville	2	5	6	10	6	8	4	10	51
Gocio	4	5	12	5	6	8	8	0	48
Englewood	1	0	3	15	6	10	12	0	47
Sarasota HS	1	0	0	10	4	0	12	20	47
Taylor Ranch	2	4	0	0	8	10	0	15	39
Ashton	2	5	9	0	8	10	4	0	38

It is important to note that of the schools that ranked in the top 10, seven of them either have projects that are funded or are proposed to be funded through the 2016/2017 Five-year CIP—Pine View (Ranked 1), Venice Middle School (Ranked 2), Brentwood Elementary (Ranked 3), Fruitville Elementary (Ranked 5), Gocio Elementary (Ranked 6), Englewood Elementary (Ranked 7), and Sarasota High School (Ranked 8). Additionally, Lakeview Elementary (Ranked 4), Ashton Elementary (Ranked 10), and Taylor Ranch Elementary (Ranked 9) are all in locations being monitored for new future elementary school sites, which would help address current and future enrollment needs at these schools through new permanent school facilities.

### **School Capacity Data and Demographics**

Sarasota County has a population of about 400,000 people. After a period of economic decline and stagnation, the County’s Planning Department reports that Sarasota County’s population is once again growing with an average of 14 new residents per day. According to the Bureau of Economic Business Research (BEBR), Sarasota County is expected to add nearly 30,000 new homes within the ten years. Much of this development is expected to be located in major development projects around Lakewood Ranch, Clark Road Properties, West Villages, East Venice, and the platted lots in North Port (Map 1).

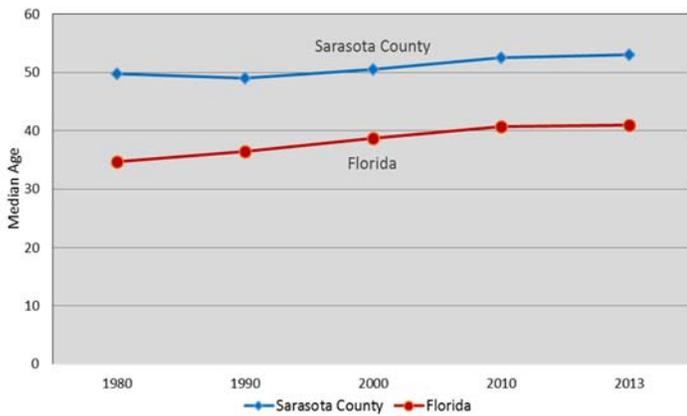
Map 1: Sarasota County Projected Development



Source: SCSB, Tindale-Oliver

However, even as Sarasota County grows, the community will continue to be a community dominated by older, retirees— with a median age of 53.5, 32.5% population over 65 and only 15% under 18, and less than half the population in the workforce (Figures 1 and 2). Figure 1 shows how Sarasota County’s average age has changed over the last three decades and shows how that average age surpasses the average in the State of Florida.

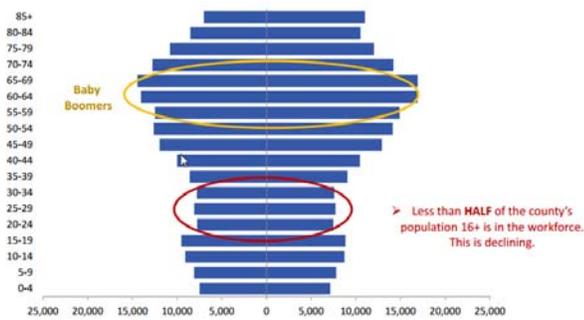
Figure 1: Median Age 1980—2013



Source: SCSB, Tindale-Oliver

Figure 2 shows the Sarasota County demographics by age category as of the 2010 census. Note: the high rate of baby boomers, aged 55-75 (yellow circle) as compared to low rate of young professionals age 20-40 (red circle). These two figures would suggest that as the population of Sarasota County grows, the population with school aged children will be underrepresented.

Figure 2: Age Distribution 2010



Source: Sarasota County, BEBR

Despite the trend for Sarasota County to have an older age population, the increased growth in the County’s population is still projected to produce an increased number of students attending Sarasota County Schools. One can see this trend in the following set of tables that show the projection expectations for Sarasota County Schools through the 2020/21 school year. Overall, the District Budget Affairs Office is projecting total enrollment growth of approximately 2,000 students between now and the 2020/21 school year.

Note, the tan bars in the table represent the current and previous school years. The orange represents the 2016/17 CIP scheduled funding year, and the blue represents the 2016/17 CIP Programmed Funding Years.

Figure 3: All Schools K—12 Student Enrollment

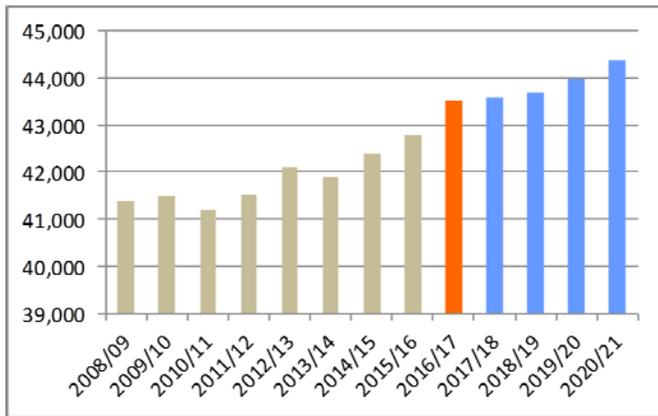


Figure 4: Traditional Elementary Student Enrolment

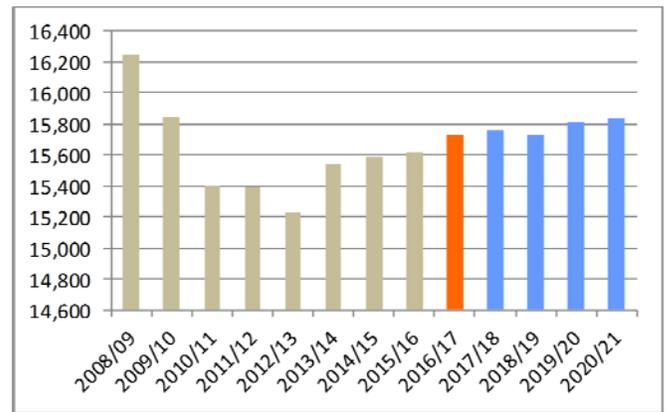


Figure 5: Traditional Middle School Student

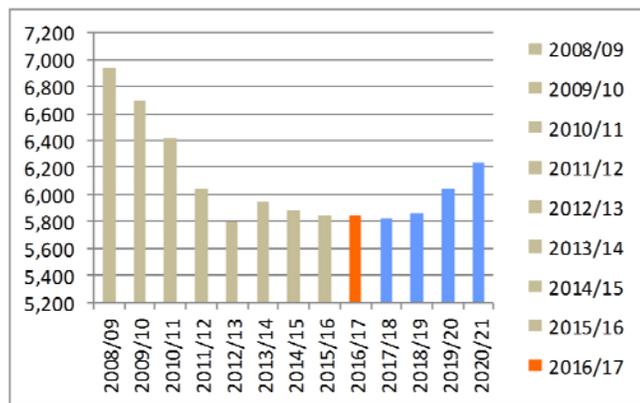


Figure 6: Traditional HS Student Enrollment

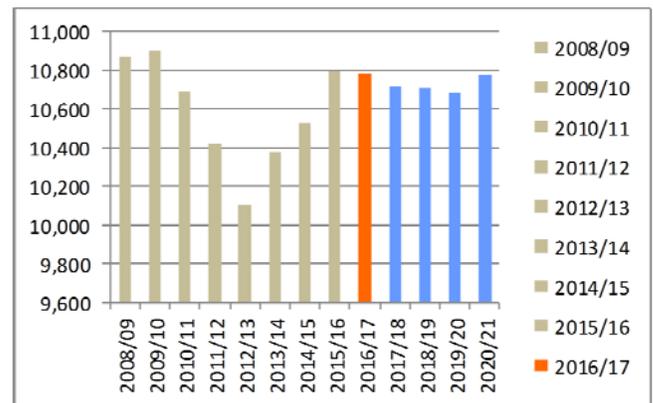


Figure 7: Traditional Other School Student Enrollment

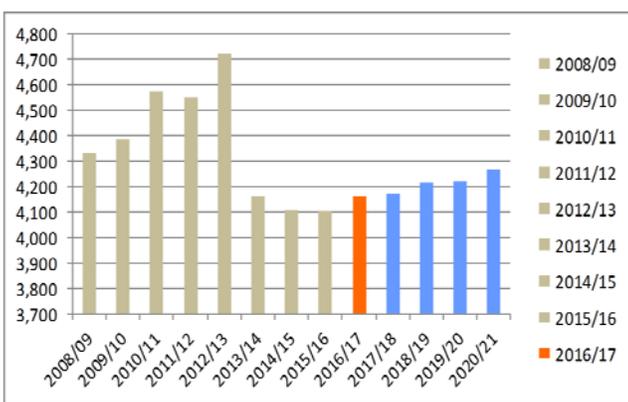
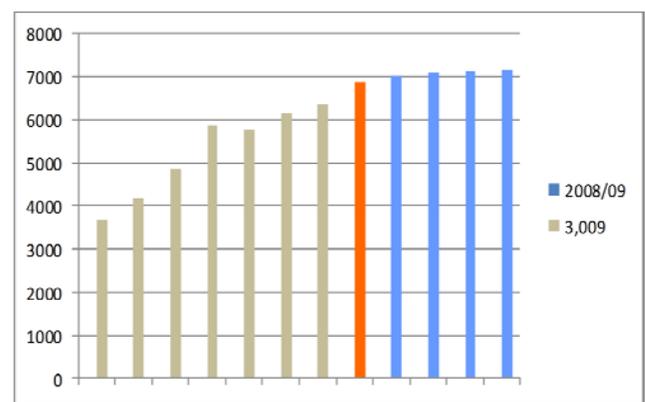


Figure 8: Charter School Student Enrollment



Note: Included with other schools is Laurel-Nokomis K-8 School, Oak Park School, and Pine View School.

## Capacity

As discussed previously, the District has 39 traditional public schools that serve the students of Sarasota County. As the District works to plan for the future growth needs of the county, it must evaluate how much capacity is available at the existing schools in order to determine when and where to locate new school facilities.

One of the Board’s capital planning policies is to provide permanent student stations for its students and use portable stations only for temporary fluctuations in enrollment. The School Board’s current level of service standards (LOS) are based on program capacity. Program Capacity measures the actual use of permanent stations at each school, accounting for inability to use all of the stations at all times due to scheduling, testing, special needs students, etc. Even as the Board and Staff have begun discussions to move the LOS standard to Florida Inventory of School Houses (FISH), the School Board remains committed to ensure future capacity evaluations take into account the inability to have a child in every seat at all times during the school day. Measurement of capacity will be a topic of discussion during the coming Fiscal Year.

The District’s current inventory of traditional schools and associated number of permanent stations, FISH capacity associated with these permanent station, as determined by the Florida Department of Education, and permanent program capacity identified by the School District are presented in Table 3. As shown, the District’s program capacity is at approximately 85 percent of the FISH capacity in the case of elementary and middle schools, and approximately 97 percent of the FISH capacity in the case of high schools. This difference in FISH utilization between elementary, middle, and high school levels is due to the fact the program capacity measures actual use and reflects loss of space due to testing labs, special purpose classrooms, and other activities that prevent schools from being able to use a portion of their student stations.

Table 4: Sarasota School Inventory

School	FISH Permanent Stations	FISH Permanent Capacity	Permanent Program Capacity	Enrollment
<b><i>Elementary Schools</i></b>				
Alta Vista	848	848	682	633
Ashton	734	734	601	896
Atwater	1,028	1,028	885	717
Bay Haven*	593	593	474	591
Brentwood	1,043	1,043	890	669
Cranberry	761	761	701	792
Emma Booker **	738	738	657	550
Englewood	644	644	538	523
Fruitville	756	756	593	762
Garden	482	482	402	649
Glenallen	930	930	774	691
Gocio	584	584	491	668
Gulf Gate	913	913	767	749
Lakeview	594	594	499	607
Lamarque	1,069	1,069	949	805
Laurel-Nokomis ES **	1,014	1,014	852	626
Phillippi Shores	731	731	607	752
Southside	826	826	694	725
Tatum Ridge	779	779	668	669
Taylor Ranch	781	781	656	628
Toledo Blade	853	853	711	741
Tuttle	849	849	704	703
Venice	766	766	650	592
Wilkinson	786	786	633	480
<b>Elementary Schools Subtotal</b>	<b>19,102</b>	<b>19,102</b>	<b>16,078</b>	<b>16,218</b>

Table 4: Sarasota School Inventory

School	FISH Permanent Stations	FISH Permanent Capacity	Permanent Program Capacity	Enrollment
<b>Middle Schools</b>				
Booker	2,011	1,810	1,665	850
Brookside	1,649	1,484	1,229	816
Heron Creek	1,702	1,532	1,258	865
Laurel-Nokomis MS	721	649	597	405
Mcintosh	1,373	1,236	1,137	682
Sarasota	1,544	1,390	1,130	1,271
Venice	1,245	1,121	816	543
Woodland	1,567	1,410	1,297	858
<b>Middle Schools Subtotal</b>	<b>11,812</b>	<b>10,632</b>	<b>9,129</b>	<b>6,290</b>
<b>High Schools</b>				
Booker	1,616	1,535	1,487	1,094
Lemon Bay (Charlotte County)	-	-	-	-
North Port	2,942	2,795	2,707	2,325
Pineview*	-	-	-	-
Riverview	2,786	2,647	2,563	2,492
Sarasota*	2,450	2,328	2,254	2,129
Venice	2,207	2,097	2,030	1,953
<b>High Schools Subtotal</b>	<b>12,001</b>	<b>11,402</b>	<b>11,041</b>	<b>9,993</b>
<b>Grand Total - All Schools</b>	<b>42,915</b>	<b>41,136</b>	<b>36,248</b>	<b>32,501</b>

\*\* Emma Booker and Laurel-Nokomis FISH capacity at these campuses is currently being reassessed in order to ensure it is accurate.

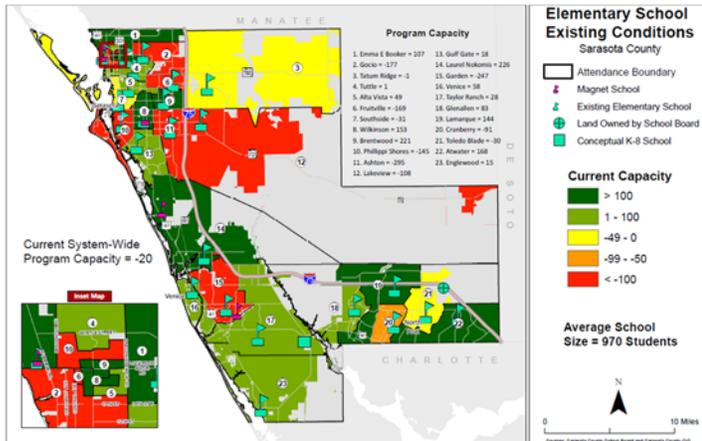
\* Pine View School and Bay Haven do not have an attendance zone – provides service countywide and is over capacity. Similarly, Suncoast Polytechnical and TriAd-Beneva (not shown in the table) have also have countywide attendance and a limited capacity. The capacities of these schools are excluded from the calculations.

\* Sarasota High School - Current project underway

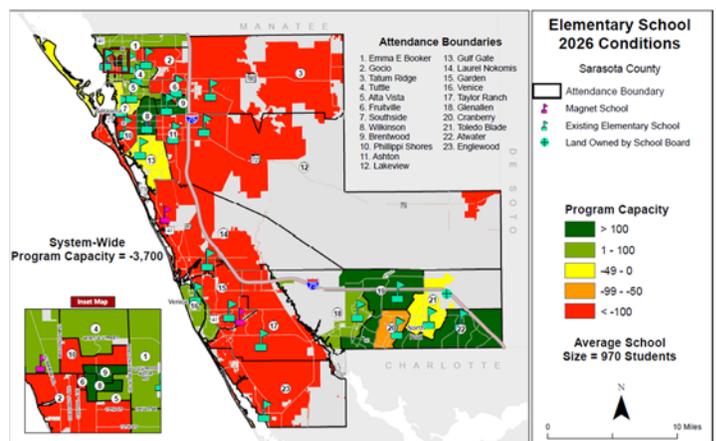
The following set of maps show the amount of capacity that exists today in Sarasota County’s elementary, middle, and high schools and what will exist in ten years if no additional capacity is added to the system. Growth projections reflected in the maps are based on 1) a SGR of 0.228 for single-family homes, 0.063 for multi-family dwelling units, and 0.021 for mobile homes and 2) population increases to approximately 440,000 people as projected by BEBR medium estimates.

**These projections are intended for planning purposes only as final capital planning decisions will be made according to the actual student enrollment demands and growth needs.**

Map 2: Elementary School Current Available Capacity.

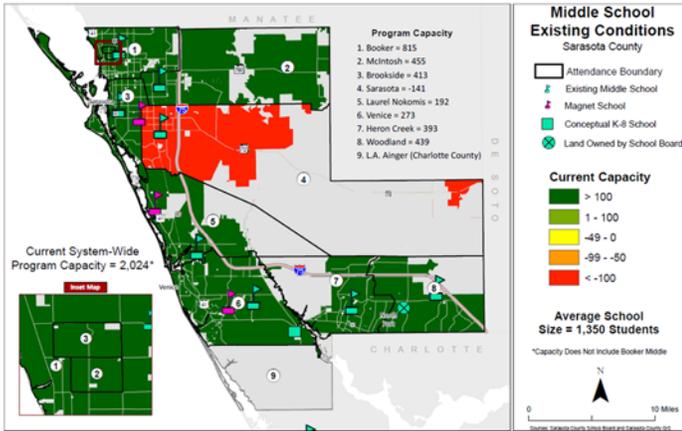


Map 3: Elementary School 2026 Projected Conditions.

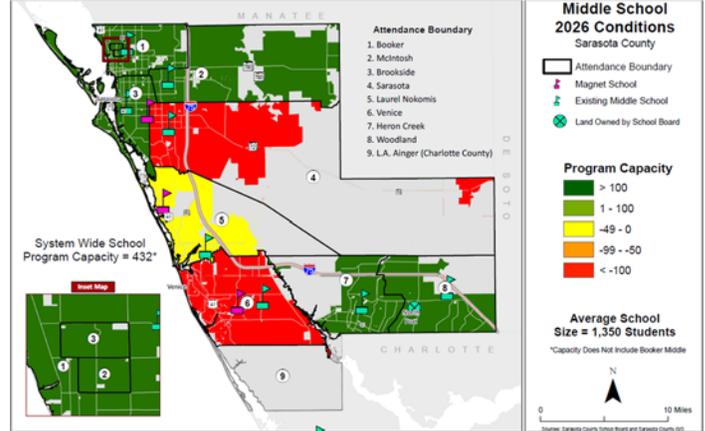


It is important to note that on the following maps, the middle school and high school attendance zones do not include the Englewood community south of Manasota Beach Road as those areas are districted to Charlotte County School District. However, through this year's CIP process the School Board requested that staff evaluate opportunities to enable all students in Sarasota County to have an opportunity to attend Sarasota County schools. In this regard, the Choice Office made a change to school choice rules that ensure students living in this area receive proximity preference if they choose to attend a school other than the one they are currently districted.

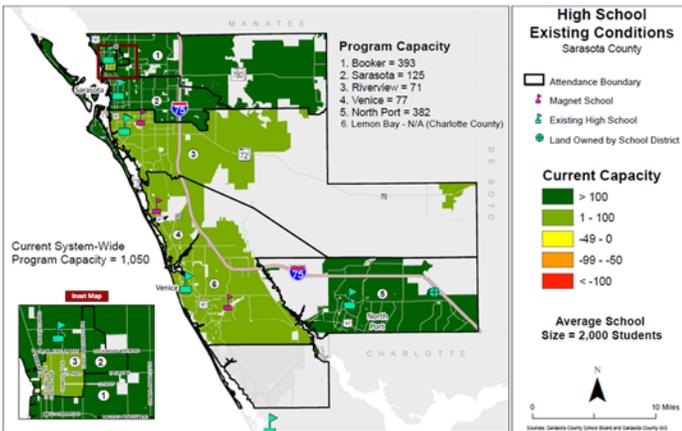
Map 4: Middle School Current Available Capacity.



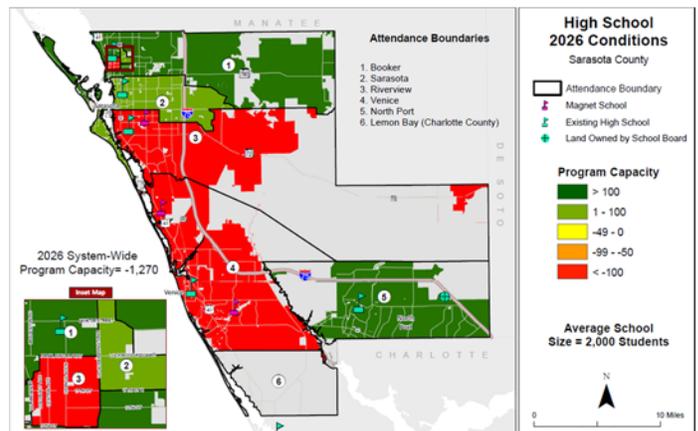
Map 2: Middle School Current Available



Map 5: High School Current Available Capacity.

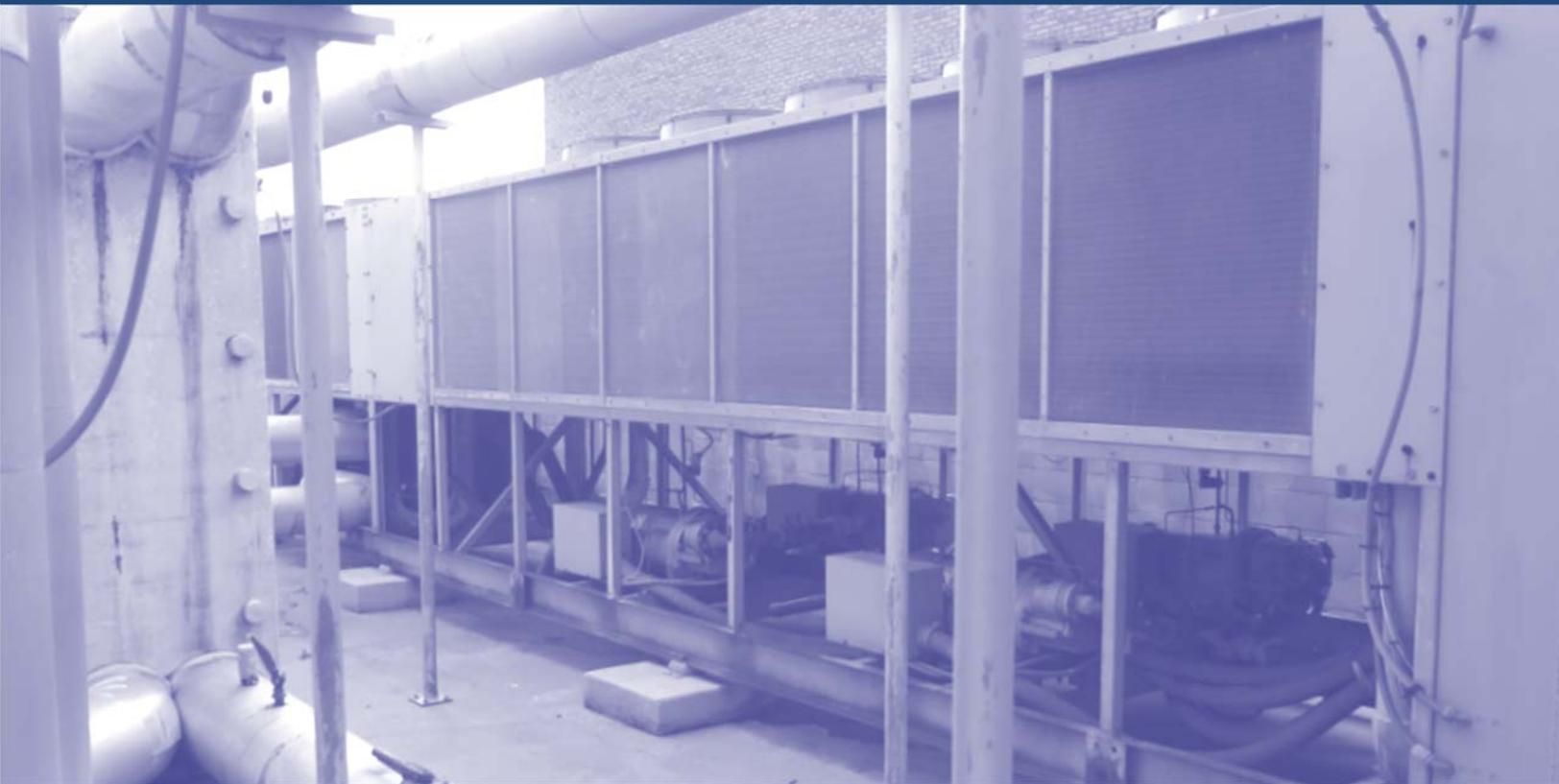


Map 2: High School Current Available



## Summary

Sarasota County Schools recognizes that its citizens demand exceptional educational services. In order to ensure that this demand is met, the District works to plan for the current and future needs of its residents and businesses by annually planning and budgeting for the development, maintenance, and improvement of the District's capital resources and facilities. The 2016-2017 Five-year Capital Improvement Plan (CIP) accomplishes this goal by: 1) setting a set of planning goals and strategies, 2) assessing the condition of existing school facilities and capital resources, 3) evaluating current student needs and future enrollment demands, and 4) prioritizing capital improvement projects for funding through the capital budget. As result, the 2016-17 Five-year CIP ensures the District can meet the high level educational expectations and demands of its citizens and businesses.



## **Chapter 2: Goals and Policies**

*Strategies for Achieving Educational Excellence*

## **Introduction**

Sarasota County School Board has five capital planning goals and associated policies that guide the planning, funding, and prioritization of its capital improvement projects. These goals articulate what issues need to be addressed in order for Sarasota County Schools to meet its vision of placing learning at the center of its activities to enable all learners to lead productive, responsible, and healthful lives. The policies give direction about how to implement the goals through planning strategies, project deliverables, planning priorities, and work items. As a result of this set of goals and policies, Sarasota County School District establishes the planning foundation for evaluating, implementing, and achieving its mission of providing the highest learning standards by engaging a high quality staff, involving parents, and a supportive community.

Included in this chapter is a section that shows how each project included within the 2016/17 Five-year Capital Improvement Plan meets the District capital planning goals. The schools and ancillary sites identified in this section reflect the decisions made at the April Board Work Session for projects to be completed as part of the 2016/17 Five-year CIP. Emergencies, funding, and other issues may change the projects actually completed in years two through five.

## **Goals and Policies**

### **GOAL 1: EDUCATION SERVICES PLANNING AND SCHOOL FACILITIES CAPACITY PLANNING.**

**Ensure that current and future educational service needs are met through planning efforts that provide for current student populations, prepare for future student demands, and provide for the overall educational facility needs of Sarasota County in order to meet the needs and demands of current and future residents and businesses.**

Policy 1.1. Level of Service Provision. Ensure that current and future educational demands are met through planning efforts that provide for current student populations, prepare for future student demands, and meet the adopted Level of Service for School Facilities by:

- a. Addressing growth management needs and ensuring school facilities provide for changes in development patterns, growth corridors, and demographic populations;
- b. Maintaining a level of service standards and concurrency management systems that ensures the educational services and facilities are provided in appropriate locations;
- c. Collaborating with local governments to review and evaluate proposed residential development projects to ensure growth is concurrent with the provision of educational services;
- d. Working with Manatee and Charlotte County Schools to coordinate the delivery of educational services by evaluating interlocal agreements, facility demands, population changes, and student reassignments.

Policy 1.2. Educational Service and Program Planning. Incorporate long-term planning for instructional programs to ensure educational services are able to adapt to changes in district strategic priorities, student population demands, and capital funding capabilities. Such a system will enable the district to:

- a. Prioritize future school rebuilds, expansions, and construction according to facility needs, conditions, locations, and budget;
- b. Utilize relocatable structures as a temporary planning tool to respond to growth and in order to minimize and reduce the dependence on such facilities;
- c. Maximize facility utilization through program relocations, attendance zone changes, or student assignment measures; and
- d. Purchase new school facilities sites necessary to support long-range needs and growth demands.

Policy 1.3. Shared-Use Facilities and Co-located Services. Maximize the utilization of district facilities, capital assets, and fiscal resources by proactively identifying opportunities to develop shared-use facilities and co-locate services with both internal and external partners—e.g.: local, regional, and state government entities, community groups, neighborhood associations, and non-for-profit agencies. Opportunities to partner on the delivery of services and facilities include:

- a. Joint-venture services and buildings such as arts centers, transportation storage yards and maintenance facilities, libraries, meeting rooms, auditoriums, conference centers, and other community resources;

- b. Recreational facilities and resources such as playgrounds, sport fields, and indoor sport venues, and other facilities;
- c. Support facilities such as warehouses, parts inventory, instructional television, print shop, media studios, and similar services; and
- d. Shared-use schools sites and buildings—particularly in the Englewood attendance zone area with Charlotte County.

### **Goal 1 Projects:**

The following details those projects scheduled to be funded in the 2016/17 CIP as well as those planned for the following four years—2017/18, 2018/19, 2019/20, and 2020/21—to implement Goal 1. Note: Projects include recurring projects, previously funded projects, and new projects:

#### Projects Scheduled to be Funded in 2016/17:

- Elementary School Site Purchase, \$2,500,000 total CIP budget
- North Port STC Phase 1, \$17,259,156 total CIP budget

#### Projects Planned for Funding in the Following Four Years:

- Elementary School J, \$30,000,000 total CIP budget
- North Port STC, Phase II, \$7,500,000 total CIP budget
- Venice Middle School Field Space and Track Facilities, \$1,000,000 total CIP budget. Note: This is a cost estimate and will be adjusted as the project scope is better defined.
- Venice High School Classroom Wing, \$12,000,000 total CIP budget. Note: This is a cost estimate and will be adjusted as the project scope is better defined.
- School Site Purchases, \$9,500,000 total CIP budget for one elementary school site and one high school site

### **GOAL 2: ASSET PRESERVATION.**

**Protect the district’s capital investments through well managed operations system that establishes best management practices for maintaining, renovating, or replacing the district’s capital assets—e.g.: facilities, systems, equipment, transportation equipment, and other resources.**

Policy 2.1. Capital Asset Operations Evaluations. Ensure the district’s capital assets provide for the educational and operations needs of the district by continually evaluating how such resources are utilized. Particular emphasis shall be to ensure that district’s capital assets:

- a. Are operating efficiently and effectively;
- b. Meet the educational needs and demands of the district’s students and educators; and
- c. Guarantee safe, up-to-date facilities that meet diverse program needs.

Policy 2.2. Preventative Maintenance Schedule. Ensure the district’s capital assets are well kept by implementing preventative maintenance schedules for each capital asset and addressing projects related to all appropriate assets including the following resources:

- a. School Facilities and Properties—e.g.: roofs, flooring replacement, major systems, playgrounds, relocatables, traffic improvements including resurfacing, expansion, and on-site queuing;
- b. Safety and Security Resources—e.g.: fire and life safety systems, fencing and single points of entry, cameras, locking systems, and access controls;
- c. Technology Systems—e.g.: computer replenishment, interactive instructional displays, learning management systems, virtual learning, streaming video, intercoms, telephones and servers; and
- d. Transportation Equipment and Vehicles—e.g.: school buses and white fleet.

Policy 2.3. Capital Improvement Priorities. Determine when to replace, construct, or purchase capital assets by evaluating each proposal according to a set of established priorities that considers issues related to need, user demand, cost, and influence on the overall ability to deliver educational services. As part of this evaluation, make certain to address local, state, and federal programs, statutes, and regulatory requirements.

Policy 2.4. Coordinated Operations. Provide for the coordinated review, management, and oversight of capital asset operations by building and utilizing interdepartmental capital facility planning teams—including staff from Planning, Facilities, Construction, Information Technologies, Safety and Security, and the Deputy Superintendent—to:

- a. Collaborate on the planning, design, and implementation of capital improvement projects;
- b. Coordinate the prioritization and review of proposed capital improvements;
- c. Bring forward the capital improvement needs and interests of the school administrations;
- d. Ensure effective and efficient project management and program implementation; and
- e. Maximize district capital resources by seeking opportunities to reduce project redundancies.

## **Goal 2 Projects:**

The following details projects scheduled to be funded in the 2016/17 CIP as well as those planned for the following four years—2017/18, 2018/19, 2019/20, and 2020/21—to implement Goal 2. Note: Projects include recurring projects, previously funded projects, and new projects:

### Projects Scheduled to be Funded in 2016/17:

- Brentwood Renovation/Cafeteria, \$12,500,000 total CIP budget
- Computer Labs, \$100,000
- Covered Walkways, \$250,000
- District Wide Environmental Health & Safety, \$40,000
- District Wide HVAC, \$1,050,000
- District Wide Playgrounds, \$120,000
- District Wide Reroofing, \$1,650,740
- District Wide Painting, \$1,265,000
- District Wide Flooring, \$1,000,000
- District Wide Asbestos Removal, \$75,000
- District Wide Asset Preservation, \$950,000
- Emma E Booker Media Center, \$650,000
- Instructional/District Remodel, \$1,400,000
- Pine View HVAC, \$18,500,000
- Pine View Elementary Offices, \$100,000
- Portable Repair and Maintenance, \$250,000
- Venice High School Bleachers, \$100,000 total CIP budget
- Venice Middle School HVAC – \$12,500,000 total CIP budget

### Projects Planned to be Funded in the Next Four Years:

- Computer Labs, \$400,000 total CIP budget total planned over four years
- Covered Walkways, \$1,000,000 total CIP budget total planned over four years
- District Wide Environmental Health & Safety, \$160,000 total CIP budget total planned over four years
- District Wide HVAC, \$4,200,000 total CIP budget total planned over four years
- District Wide Playgrounds, \$480,000 total CIP budget total planned over four years
- District Wide Reroofing, \$6,602,960 total CIP budget total planned over four years
- District Wide Painting, \$5,060,000 total CIP budget total planned over four years
- District Wide Flooring, \$4,000,000 total CIP budget total planned over four years
- District Wide Asbestos Removal, \$300,000 total CIP budget total planned over four years
- District Wide Asset Preservation \$1,800,000

- Instructional/District Remodel \$6,000,000
- Bay Haven Building 4, \$250,000, planned for 2017/18 total planned over four years
- District wide LED Lighting Project, \$2,000,000 total planned over four years
- Englewood Building 6 Renovation/Rebuild, \$4,200,000, planned for 2018/19
- Gocio Classroom Wing, \$10,000,000, planned for 2017/18 Note: This is a cost estimate and will be adjusted as the project scope is better defined.
- Pineview Classroom Wing, \$20,000,000, planned for 2018/19
- Pineview Core, \$7,000,000, planned for 2020/21. Note: This is a cost estimate and will be adjusted as the project scope is better defined.
- Sarasota High School Building 6, \$600,000 planned for 2017/18 Note: This is a cost estimate and will be adjusted as the project scope is better defined.

### **GOAL 3: SAFETY AND SECURITY.**

**Support the academic success of each child with a comprehensive safety and security program and services that effectively uses security technologies and infrastructure aligned with campus security and emergency management best practices.**

Policy 3.1. Campus Access. Manage access to campus through:

- a. Renovation of main office entrances to limit visitor access to the student side of the campus, designating single points of entry controlled with electronic access control and computerized visitor management tools.
- b. Functional fencing, gates, bollards, and security window film to control access and increase stand-off distance.

Policy 3.2. Campus Security. Establish safe internal campus security by:

Upgrading classroom and administrative support doors with keysets that lock from the inside, and, where appropriate, implement electronic access control.

Policy 3.3. Security Technology. Utilize technology that helps monitor campus activities and ensure effective emergency management communication including:

- a. Video security cameras with a migration path to ensure reliability through upgrades and enhancements.
- b. Redundant emergency communication/mass notification methods for visible and audible emergency messaging, including automated notification of severe weather conditions for outdoor venues.
- c. Reliable campus two-way radio communication systems and interoperable two-way communications for direct communication with first responder agencies, including in-building bi-directional amplifiers where required.

#### **Goal 3 Projects:**

The following details projects scheduled to be funded in the 2016/17 CIP as well as those planned for the following four years—2017/18, 2018/19, 2019/20, and 2020/21—to implement Goal 3. Note: Projects include recurring projects, previously funded projects, and new projects:

#### Projects Scheduled to be Funded in 2016/17:

- Access Control \$150,000
- District Wide Fire Alarm Upgrades, \$200,000
- District Wide Safety & Security, \$1,700,000
- District wide Single Point of Entries, \$100,000
- Fencing, \$100,000
- Oak Park Entryway, \$200,000
- Radio Systems, \$75,000
- Security Cameras, \$150,000

### Projects Planned to be Funded in the Next Four Years:

- Access Control \$600,000 total planned over four years
- District Wide Fire Alarm Upgrades, \$600,000 total planned over four years
- District Wide Safety & Security, 6,800,000 total planned over four years
- District wide Single Point of Entries, \$400,000 total planned over four years
- Elementary Playground Restrooms, \$625,000 total planned over four years
- Fencing, \$400,000 total planned over four years
- Radio Systems, \$300,000 total planned over four years
- Security Cameras, \$600,000 total planned over four years

## **GOAL 4: TECHNOLOGY.**

**Implement and support technology infrastructure to ensure students and staff have anytime, anywhere access to the latest educational technology and resources.**

Policy 4.1. Technology Network Infrastructure. Support the district's educational programs and operations system by establishing a technology network infrastructure system that enables all other technology components to maximize their usefulness and potential. Increase the capacity of the district's technology infrastructure system by:

- a. Partnering with Sarasota County Government's IT Department to build, maintain, and operate a jointly owned fiber ring throughout the county to serve all of our schools and department sites; and
- b. Replacing and upgrading the wired and wireless Local Area Network (LAN) and continually upgrading and replacing out of date equipment.

Policy 4.2. Classroom and School Technology Equipment. Improve the overall educational experience of our students and staff through classroom and school technology equipment that puts technology tools (e.g.: projectors, interactive whiteboards/panels, student response devices, voice enhancement systems, document cameras, and interactive teaching peripherals) in the hands of our students and staff. Particular emphasis shall be on:

- a. Exploration, implementation and support of options regarding mobile digital devices for student use in the classroom and for assessment;
- b. Implementing an interactive panel display replenishment program that provides an updated classroom instructional tool for staff at all schools in the district;
- c. Support of the schools' auditorium systems ability to utilize up-to-date technology for the benefit of student learning as well as school and community events and performances; and
- d. Implementing a computer replenishment program that provides an equitable model and computer platform to all schools in the district.

Policy 4.3. District wide Technology Infrastructure. Enable the district to utilize technology to support both instructional and business functions throughout the entire district and ensure that the district is able to function at high level through support technology infrastructure systems that include:

- a. Technology funds necessary to support our learning management systems, virtual learning, streaming video, video conferencing, individualized learning system, and reading progress monitoring;
- b. District wide communications technology including intercoms, clocks, and telephones; and
- c. Computing infrastructure replacements and upgrades necessary to support blades, school servers, and television studios.

### **Goal 4 Projects:**

The following details projects scheduled to be funded in the 2016/17 CIP as well as those planned for the following four years—2017/18, 2018/19, 2019/20, and 2020/21—to implement Goal 4. Note: Projects include recurring projects, previously funded projects, and new projects:

#### Projects Scheduled to be Funded in 2016/17:

- Auditorium Sound/Lighting Systems, \$150,000
- Career and Technical Education, \$96,000
- Classroom Instructional Technologies, \$3,540,000
- Classrooms of Tomorrow, \$255,692
- Computing Infrastructure, \$425,000
- Digital Devices, \$375,000
- District Instructional Technologies, \$463,710
- District Wide Communications Support, \$530,000
- Local Area Network (LAN) Support, \$1,099,000
- Professional Development System Replacement, \$30,000
- Scoreboard Replacements, \$30,000
- Software Development Instructional Evaluation Systems, \$300,000

#### Projects Planned to be Funded in the Next Four Years:

- Auditorium Sound/Lighting Systems, \$600,000 total planned over four years
- Career and Technical Education, \$360,000 total planned over four years
- Classroom Instructional Technologies, \$14,160,000 total planned over four years
- Computing Infrastructure, \$1,700,000 total planned over four years
- Digital Devices, \$1,500,000, total planned over four years
- District Instructional Technologies, \$1,976,279 total planned over four years
- District Wide Communications Support, \$2,120,000, total planned over four years
- Local Area Network (LAN) Support, \$4,396,000, total planned over four years
- Professional Development System Replacement, \$120,000 total planned over four years
- Scoreboard Replacements, \$120,000, total planned over four years
- Software Development Instructional Evaluation Systems, \$1,200,000 total planned over four years
- TEAL/TELL, \$400,000, total planned over four years

### **GOAL 5: CAPITAL IMPROVEMENT FUNDING.**

**Execute a capital improvement financing strategy that plans, maintains, and provides for the delivery of a highly valued, well managed, and fiscally responsible educational services and infrastructure system.**

Policy 5.1. Capital Improvement Planning. Ensure that developments do not exceed the district's ability to provide these improvements in accordance with established service priorities and capital asset needs by establishing a CIP which identifies all capital improvement projects which the district will undertake. The CIP shall include projects which:

- a. Meet existing deficiencies and augment existing operations.
- b. Provide repair or replacement of existing facilities.
- c. Accommodate planned future growth.
- d. Address maintenance needs that result from future growth.

Policy 5.2. Five-year CIP. Provide for the current capital needs of the school district by establishing the district's immediate capital priorities, funding strategies, and five-year capital improvement priorities by:

- a. Completing an annual assessment of potential capital projects to ensure that current and future capital assets meet the district's establish strategic goals, are properly accounted for in the district's budgeting practices, and achieve previously established project priorities;
- b. Evaluating potential projects for inclusion on the five-year CIP according to criteria that considers issues related to: need to correct deficiency, repair or replace facility, accommodate new growth; project location and student considerations; community interests and demands; projected estimated cost and fiscal capabilities; and priority ranking relative to other proposed projects and capital needs; and

- c. Ensuring that the district does not add new projects to the five-year CIP unless there is an overriding demonstrated need for the project, new funding revenues are found that help finance the project, or the project is shown to meet a strategic goal of the district.

Policy 5.3. Capital Asset Utilization and Financing. Promote lifecycle cost management practices that improve the efficiency and effectiveness of education systems and services through the following practices:

- a. Maintenance, operation, and construction practices that reduce capital costs, promote efficient use of financial resources, and increase capital asset use and functionality; and
- b. Reinvestment of monies saved through such practices back into the district's capital assets so that additional savings may be realized.

Policy 5.4. Funding Mechanism Assessments. Ensure that development bears a proportionate share of needed facility improvements both now and in the future by regularly evaluating:

- a. Whether present fees are adequate to address the impacts of inflation.
- b. Whether the district needs to adjust impact fees, as appropriate.
- c. Whether other capital financing mechanisms may be needed and used to help meet the fiscal demands placed on the district by new development.

Policy 5.5. Capital Project Budget. Implementing the Capital Projects budget requires a team of construction, facility, technology, telecom, and instructional leaders to systematically:

- a. Develop a list of small [i.e., less than \$50,000] instructional/safety projects, by site;
- b. Rank the requests as to priority; and
- c. Ensure adequate funding for as many as possible.



## **Chapter 3: Key Planning Issues**

*Moving Forward*

## **Introduction**

This report has highlighted the CIP planning process including the goals that guide the process, the tools staff uses to objectively evaluate the condition and need for facility improvements, and the demographic and growth conditions which Sarasota County Schools must address in order to ensure there is sufficient capacity to meet the needs of educational services. However, before the Board can evaluate whether specific planning projects are priorities for capital funding, it is important to understand the current and future planning issues that are driving the demand and need for capital improvement.

The next section seeks to quickly identify those current and future planning issues, in order to provide additional context about what projects should be completed with the 2016/17 Five-year Capital Improvement Plan. These issues, along with the Board's established goals and priorities, are the basis for making current capital budget recommendations. These issues help set the framework for evaluating capital projects and making current capital budgetary recommendations.

## **Current Planning Issues**

- After a five-year economic downturn, the local economy is on a steady rebound—buoyed by resurgence in the construction, hospitality, health care, service, and tourism industries. A growth management study completed for the district foresees new development will result in a need for new schools—particularly at the elementary and high school levels. However, the amount of new capacity needed will have to be evaluated on an ongoing basis as it is unclear whether the new development residential market will be affordable to working families. The pace of that development is also unclear.
- The district has significantly reduced its reliance on relocatable classrooms at the same time capacity at the elementary and high school levels are at or near capacity—particularly in the higher growth areas. Thus as growth happens the district will have to be careful about how it utilizes portables, ensuring that they remain available to provide capacity for new students before permanent capacity may be developed. This is the reason that the 2016/17 Five-year CIP proposes to invest in the upkeep and maintenance of existing portables as well as the development of a permanent student station classroom wing at Gocio Elementary. That wing will increase the number of portables available to address increasing enrollment demands.
- The School District only has 5 undeveloped school sites — an elementary school site in Lakewood Ranch as well as two elementary, one middle school, and one high school sites in North Port. As such, the proposed 2016/17 Five-year CIP proposes to purchase two new elementary school sites and one new high school site. Additionally, staff is working with developers to secure other sites as part of their development processes.
- The proposed 2016/17 Five-year CIP includes the development of one new elementary school and the construction of a new 400 student station wing at Venice High School.
- Schools' educational adequacy has been maintained by updating our Educational Specifications and design standards, and by an aggressive Technology Plan including Active Boards/panels, a shortened four-year computer refresh cycle, and improved access to wireless. Now, Tech Active spaces and TELL studios are being installed to provide our teachers and students with the types of settings students will utilize at the post-secondary level. The proposed 2016/17 Five-year CIP would seek to fund the completion of the Tech Active spaces and continued investment in TELL studios.
- School safety and security have been greatly enhanced by the safer designs of newer schools, expanded perimeter fencing, and additional security cameras, and visitor access control. The proposed 2016/17 Five-year CIP seeks to increase the number of single-point of entry campuses that can be constructed in an year.
- Large-scale residential developments are once again under way as indicated by development activities in Villages of Lakewood Ranch, in northern Sarasota County; West Villages, Island Walk, Grand Palm, and other major projects along River Road and US 41 in the Venice-North Port area; Palmer Ranch in central Sarasota County; and Neal Communities along the Laurel Road – Border Road corridors

- Sarasota County property values continue to increase following the recession. A conservative estimate of a 6% per year increase in taxable value is being forecasted along with sales tax collections increasing by approximately 3%. Additionally, Sarasota County Schools has reinstated the collection of school impact fees. These three factors will increase the capital revenues by approximately \$5-6 million per year. The fact that the ad valorem millage rate remains at 1.5 mil continues to hamper the District's ability to execute a completely effective capital program.

### **Future Planning Considerations**

Recognizing that Sarasota County is transitioning from a period of economic decline to one of prosperity and growth, the following future planning considerations need continual evaluation and study. These issues are important because they will define how new residential growth and increased jobs will influence the district's ability to provide educational services in the future. Continual and careful evaluation of development and planning concerns are necessary because it is difficult to correctly project how the county's residential housing market and job-based economic conditions will influence the timing, location, and demand for future educational services.

- While total school enrollment has started to slowly increase after a five-year period of flat enrollments, economic and enrollment indicators show that the district is in the early stages of a period of steady growth. However, as with previous residential booms, the price of housing has also begun to rise and is outpacing the increase to median household incomes. As such, it is unclear how many working families with school age children will be able to afford to reside in Sarasota County.
- The district has long valued a variety of public school choice options. As such, questions remain about how many students will select traditional public schools versus other options such as charter schools, virtual schools, and private schools. COFTE and district projections indicate a smaller percentage of students will attend traditional schools. However, the growth management study indicates that the current rate of about 15% will remain steady. All projections indicate the middle schools will continue to draw the greatest number of students away from traditional schools.
- The district's reduced reliance on relocatable classrooms and plans for only one new school may change as enrollment and demand for educational services increases. The location, type, and timing of these new school facilities will be continually evaluated as part of the district's on going planning efforts.
- Debt associated with Phillippi Creek Elementary, Venice High School, and Wilkinson Elementary Schools has been paid off making room available for borrowing should future borrowing be necessary.

### **Emerging Capital Priorities**

Given the progress that the School Board has made reaching its prior capital goals and recognizing that planning is an every changing process, the following emerging issues and priorities are presented for the Board's consideration:

- District Fiber is an issues that the District may need to address in the future. Such a project could be costly and could have a significant impact on future Capital Improvement Planning efforts.
- Should legislation change, the District may decide to fund future site licenses out of the capital budget. While current state legislation regulates that site licenses be paid from general funds the state is considering changes to that regulation that would allow local school districts to decide how to fund site licenses. If the Board chose to fund site licenses out of capital, it would take another a few million out of the capital budget annually.
- Schools for growth. As discussed throughout this document, Sarasota County Schools enrollment is on the rise as growth has returned to the County. The question is how many students will enter traditional public schools, what schools will they attend, and how quickly will the School District need to add school capacity. The Planning Department will continue to monitor the growth in the county, enrollment of the schools, and future development projects in order to advice the Board on appropriate growth management actions.





## **Chapter 4: Five-year CIP Projects**

*Implementing the Goal*

## Introduction

An essential part of the district's incorporation of the CIP process is the involvement of all stakeholders – School Board members, executive directors and cabinet, principals, instructional staff, support staff, students, parents, and community. Such a process empowers those responsible for the CIP implementation and establishes a shared understanding of project priorities.

The determination of which projects should be recommended for CIP funding is done by the Capital Projects Team, facilitated by the Planning Department and consisting of the Deputy Superintendent, Executive Directors, and Department Staff from Construction, Facilities, Information Technology, Safety & Security, Planning, and Instructional Technology

The 5-year CIP process seeks to establish planning priorities and budget for a five-year schedule — this year from the 2016/17 SY through the 2020/21 SY. Projects scheduled in first year of the CIP (2016/17) are deemed the most important capital project priorities. Such projects are considered funded or programmed and generally these projects do not change. Projects in the second through fifth years are considered planned projects. While planned projects can change in order to address current needs, such changes can impact the planning, maintenance, use and cost associated with these projects. Indeed planning, development, and design for most large projects starts two or three years prior to being funded or programmed. As such, a change to the project schedule can impact the effectiveness of the overall 5-year CIP.

The following 2016/17 Five-year Capital Program is the result of this process. Projects that have been funded in previous CIP cycles are included under the heading, "Previously Approved Projects." Projects that have not received funding in the past but the Board directed staff to include with the 2016/17 capital budget are included under the heading, "New Projects".

Table 5: 2016/17 Five-Year CIP Program

	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
<b>Revenues</b>						
<b>Beginning Fund Balance</b>	71,939,741	10,529,438	2,314,016	8,574,273	16,685,395	11,866,689
<b>Estimated Revenues</b>	96,199,485	98,357,388	103,652,138	109,247,338	115,164,408	121,415,824
<b>Impact Fees</b>		2,000,000	2,500,000	3,000,000	3,500,000	4,000,000
<b>Total Revenues &amp; Beginning Fund Balance</b>	<b>168,139,226</b>	<b>110,886,826</b>	<b>108,466,154</b>	<b>120,821,611</b>	<b>135,349,803</b>	<b>137,282,513</b>
<b>Recurring Appropriations</b>						
<b>Transfers &amp; Debt Srv</b>	52,169,301	46,049,630	46,270,800	46,741,996	47,133,837	47,573,321
<b>Recurring Expenses</b>	37,674,375	26,021,240	31,553,235	28,190,501	28,004,248	28,050,305
<b>Charter Schools Pymts</b>	2,763,567	3,266,198	3,396,846	3,532,720	3,674,029	3,820,990
<b>Total Recurring Appropriations</b>	<b>92,607,243</b>	<b>75,337,068</b>	<b>81,220,881</b>	<b>78,465,216</b>	<b>78,812,113</b>	<b>79,444,616</b>
<b>Previously Approved Projects</b>						
Career Technical Ed.	96,000	96,000	96,000	96,000	96,000	96,000
COT - Tech Activ	1,433,857	650,000	250,000			
Covered Walkways	316,515	250,000	250,000	250,000	250,000	250,000
NP STC	11,956,718	6,000,000			7,500,000	
Pine View HVAC	13,329,521	3,000,000				
TEL Studios	100,000	100,000	100,000	100,000	100,000	100,000
<b>Total Funded Projects</b>	<b>58,352,545</b>	<b>10,096,000</b>	<b>696,000</b>	<b>446,000</b>	<b>7,946,000</b>	<b>446,000</b>
<b>Total Recurring Exp. &amp; Funded Projects</b>	<b>150,959,788</b>	<b>85,433,068</b>	<b>81,916,881</b>	<b>78,911,216</b>	<b>86,758,113</b>	<b>79,890,616</b>
<b>Ending Fund Balance</b>	<b>17,179,438</b>	<b>25,453,758</b>	<b>26,549,273</b>	<b>41,910,395</b>	<b>48,591,689</b>	<b>57,391,897</b>
<b>(Restrctd Fund Balance)</b>	<b>0</b>	<b>7,164,742</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>For Competing Projects</b>	<b>17,179,438</b>	<b>18,289,016</b>	<b>26,549,273</b>	<b>41,910,395</b>	<b>48,591,689</b>	<b>57,391,897</b>

Table 5: 2016/17 Five-Year CIP Continued

New Projects						
	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
<b>Available for Competing Projects</b>	<b>17,179,438</b>	<b>18,289,016</b>	<b>26,549,273</b>	<b>41,910,395</b>	<b>48,591,689</b>	<b>57,391,897</b>
Bay Haven Building 4			250,000			
Brentwood Renovation/Cafeteria		6,000,000	6,500,000			
District LED			500,000	500,000	500,000	500,000
District Single Point Entry		100,000	100,000	100,000	100,000	100,000
Elementary J					30,000,000	
Elementary PE Bathrooms		125,000	125,000	125,000	125,000	125,000
Englewood Bldg 6				3,500,000		
Emma Booker Media Center	650,000					
Gocio Classroom Wing			10,000,000			
Oak Park Entryway		200,000				
Pine View Classroom Wing				20,000,000		
Pine View Core						7,000,000
Pine View Elementary Offices		100,000				
Portable Repair		250,000				
Sarasota High Bldg 6		600,000				
School Site Purchases		2,500,000				10,000,000
VHS Bleachers		100,000				
VHS Classroom Wing					6,000,000	6,000,000
VMS HVAC	6,000,000	6,000,000	500,000			
VMS Track Amendment				1,000,000		
<b>Total Proposed Competing Projects</b>	<b>6,650,000</b>	<b>15,975,000</b>	<b>17,975,000</b>	<b>25,225,000</b>	<b>36,725,000</b>	<b>23,725,000</b>
<b>Balance</b>	<b>10,529,438</b>	<b>2,314,016</b>	<b>8,574,273</b>	<b>16,685,395</b>	<b>11,866,689</b>	<b>33,666,897</b>

### Project Sheets

The following pages highlight each of the projects selected for this year's five-year CIP, in alphabetical order. The intent to use this section to highlight the project's goals, purpose, status, condition, and cost as well as explain which of the Board's goals that project seeks to achieve.

# Bay Haven Building 4

## CIP PROJECT SUMMARY

### Description

#### Scope:

Renovate Bay Haven Building 4 to remove the separating wall in order to be able to better utilize the space in an efficient manner. This small building houses art.

#### Project Status

Planning.

### Assessment

#### Goal:

Meet Goal 2, Policy 2.2 by providing for a well maintained campus that provides highly effective learning environments.

#### Condition:

The building is small with two rooms that used to house music and art. Music has moved to the new Building 2, and art now uses both rooms. This project would allow for a more effective art program space.

### Funding

#### Budget:

\$250,000

#### CIP Funding Years:

2017/2018



# Brentwood Renovation/New Cafeteria

## CIP PROJECT SUMMARY

### Description

#### Scope:

Upgrade the campus to address an undersized and over-utilized cafeteria and upgrade other campus facilities, including air handlers.

#### Project Status

Planning and design. Construction expected to commence in Summer 2017.

### Assessment

#### Goal:

Meet Goal 1, Policy 1.2 and Goal 2, Policy 2.2 by providing for a well maintained campus environment and ensuring students have the core facilities that meet their needs.

#### Condition:

The Condition Matrix Score for Brentwood is 54. The cafeteria is old and has not been upgraded as new classroom spaces were constructed. The HVAC and building spaces are needing to be refreshed.

### Funding

#### Budget:

\$12,500,000

- 6,000,000 Cafeteria
- 6,500,000 Campus upgrades and HVAC

#### CIP Funding Years:

2015/16 and 2016/17



# Career and Technical Education

## CIP PROJECT SUMMARY

### Description

#### Scope:

Provide CTE labs and classrooms equipped with technical, robotics, and technology based education for middle school and high school students.

#### Project Status

Classrooms provided at all eight middle schools and five comprehensive high schools in the District.

### Assessment

#### Goal:

Meet Goal 4, Policy 4.2 by providing all middle school students technology-based education for middle and high school students.

#### Condition:

New and enhanced technology installation within middle and high school CTE labs and classrooms.

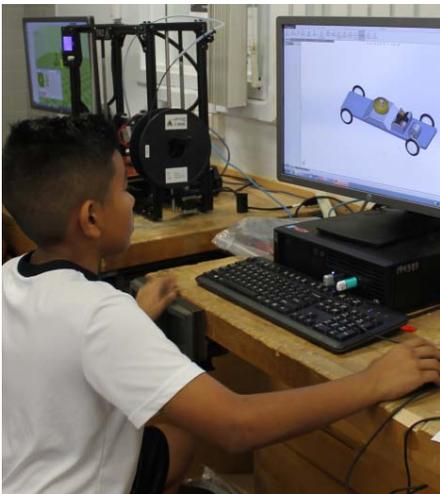
### Funding

#### Budget:

\$96,000 annually;  
\$480,000 total in 5 –year CIP

#### CIP Funding Years:

2016/2017, 2017/2018;  
2018/2019; 2019/2020;  
2020/2021



# Classrooms of Tomorrow—Tech Active

## CIP PROJECT SUMMARY

### Description

#### Scope:

Providing high tech, small group education systems for math, science, language arts, and social studies at all Sarasota County Middle Schools.

#### Project Status

Initial project design and installation is nearing completion. The 2016/2017 CIP is the last year of its funding. Project will move into a maintenance and update phase.

### Assessment

#### Goal:

Meet Goal 4, Policy 4.2 by providing all middle school students technology-based education in the core academic programs.

#### Condition:

New technology installation within middle school core academic classrooms.

### Funding

#### Budget:

\$650,000 — provides funding for 44 classrooms this year. By the end of next year, COT development will be complete.

#### CIP Funding Years:

2016/2017 and 2017/2018



## Covered Walkways

### CIP PROJECT SUMMARY

#### Description

##### Scope:

Improve the walking conditions, particularly at the elementary school level, by replacing and installing new covered walkways along bus loops, parking loops, and portables.

##### Project Status

On going campus maintenance project. New campuses are selected on an annual basis.

#### Assessment

##### Goal:

Meet Goal 2, Policy 2.2 by providing for the environmental safety of our students through shaded and dry walkway canopies.

##### Condition:

Varies through the district. Covered walkways needs are assessed on an annual basis.

#### Funding

##### Budget:

\$250,000 annually;  
\$1,250,000 total in five-year CIP

##### CIP Funding Years:

2016/2017, 2017/2018;  
2018/2019; 2019/2020;  
2020/2021



# District LED Lighting

## CIP PROJECT SUMMARY

### Description

#### Scope:

Replace existing traditional high energy lighting with efficient low energy LED lighting throughout the District.

#### Project Status

In process. Project is done on a continual basis. This funding will increase the ability to expand the current maintenance project.

### Assessment

#### Goal:

Meet Goal 2, Policy 2.2 by providing for well maintained facilities that maximize district resources and reduce resource consumption.

#### Condition:

Maintenance. Projected savings of 70% of the lighting cost throughout the district will result from this project.

### Funding

#### Budget:

\$500,000 annually;  
\$2,000,000 total in final four years of Five-year CIP

#### CIP Funding Years:

2017/2018, 2018/2019, 2019/2020, 2020/2021



# District Single Point of Entry

## CIP PROJECT SUMMARY

### Description

#### Scope:

Provide each campus with a single point of entry through the front office and restrict access through improved fencing in all other parts of campus.

#### Project Status

Constructing single-point of entries at campus throughout the District. This project increases the budget allocation for this project and doubles number of schools able to be done annually.

### Assessment

#### Goal:

Meet Goal 3, Policy 3.1 by better managing campus access through a single point of entry for all campuses at the main office and improved security fencing.

#### Condition:

Maintenance and security.

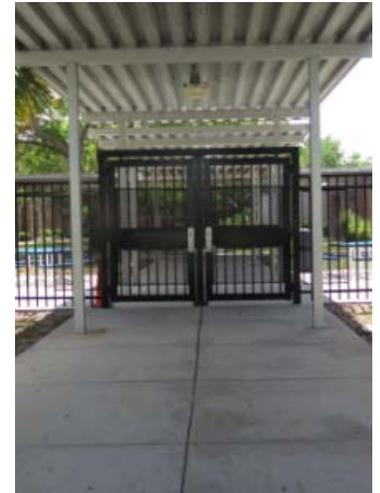
### Funding

#### Budget:

\$100,000 annually;  
\$500,000 total in five-year CIP

#### CIP Funding Years:

2016/2017, 2017/2018,  
2018/2019, 2019/2020,  
2020/2021



# Elementary J

## CIP PROJECT SUMMARY

**Description**

**Scope:**  
New elementary school to meet the growth demand of Sarasota County .

**Project Status**  
Planning.

**Assessment**

**Goal:**  
Meet Goal 1, Policies 1.1 and 1.2 by providing capacity for education students to meet the demands of future development.

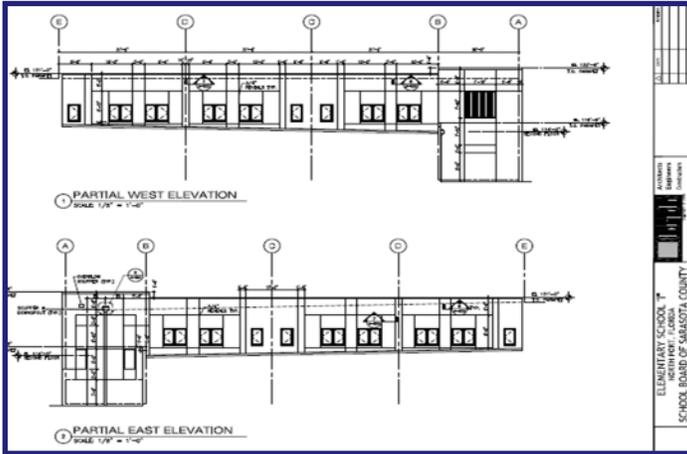
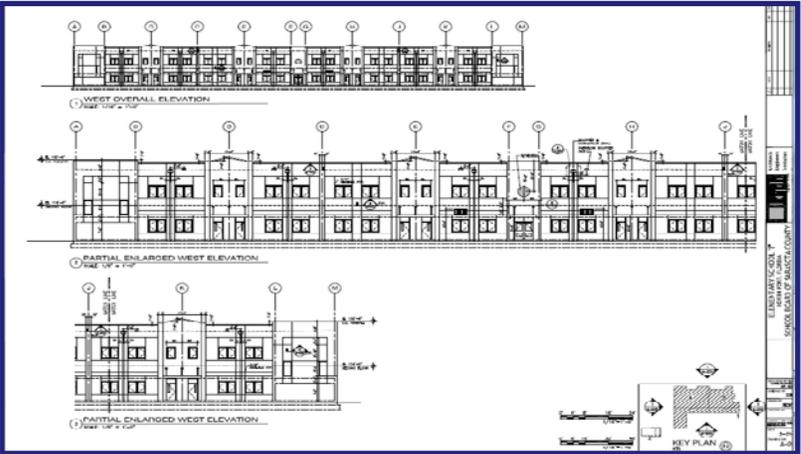
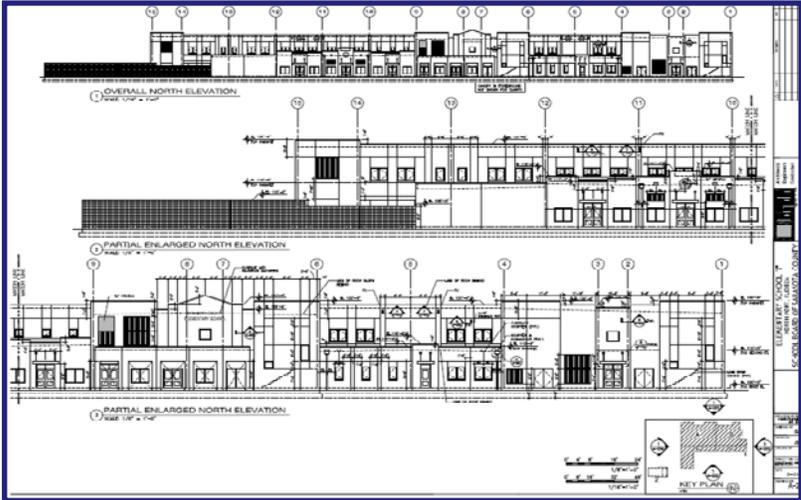
**Condition:**  
New campus. Undeveloped.

**Funding**

**Budget:**  
\$30,000,000

Note: Project budget will be revised in future capital plans as the scope

**CIP Funding Years:**  
2019/20



# Elementary PE Bathrooms

## CIP PROJECT SUMMARY

### Description

#### Scope:

Construct new PE restrooms that are within visual site of the outside PE areas. This project will ensure all elementary schools have PE restrooms.

#### Project Status

Constructing PE Bathrooms.

### Assessment

#### Goal:

Meet Goal 2, Policy 2.2 and Goal 4 by providing for a well maintained, safe learning environment for all elementary students while attending PE class outside.

#### Condition:

Student safety concern.

### Funding

#### Budget:

\$125,000 annually;

\$625,000 total in Five-year CIP. This will complete the goal at all elementary schools.

#### CIP Funding Years:

2016/2017, 2017/2018,  
2018/2019, 2019/2020,  
2020/2021



# Emma E Booker Media Center

## CIP PROJECT SUMMARY

### Description

#### Scope:

Upgrade the Emma E Booker Media Center by creating a digital learning lab that features an upgraded media center with new design and furnishings, better layout, and improved technology area.

#### Project Status

Planning and design. Initial design developed by the District's staff architect.

### Assessment

#### Goal:

Meet Goal 2, Policy 2.2 and Goal 4, Policy 4.2 by providing well-maintained, technology based learning environments.

#### Condition:

Upgraded media center with new technology and improved layout.

### Funding

#### Budget:

\$650,000

#### CIP Funding Years:

2016/2017



# Englewood Building 6

## CIP PROJECT SUMMARY

### Description

#### Scope:

Rebuild Englewood Building 6 due to age, maintenance cost, and limited flexibility and accessibility. Also look to add classroom space for this small campus located in a growing community.

#### Project Status

Planning and scope. Staff architect has designed a preliminary building design and scope.

### Assessment

#### Goal:

Meet Goal 1, Policies 1.1 and 1.2 and Goal 2, Policy 2.2 by ensuring that the campus facilities meet the needs of growth while providing for a high level of campus maintenance.

#### Condition:

The Condition Matrix Score for Englewood is a 47. Building 6 is in need of a complete renovation; however, the cost to renovate exceeds the cost to rebuild.

### Funding

#### Budget:

\$4,200,000

- \$3,500,000 CIP
- \$750,000 Facilities Budget

Note: Project budget will be revised as scope of the project is better defined

#### CIP Funding Years:

2018/2019



# Gocio Elementary Classroom Wing

## CIP PROJECT SUMMARY

### Description

#### Scope:

Provide permanent student classroom space for students at Gocio Elementary currently placed in temporary portables.

#### Project Status

Pre-planning and project scope development.

### Assessment

#### Goal:

Meet Goal 1, Policy 1.2 and Goal 2, Policies 2.2 and 2.3 by providing permanent student stations for students at Sarasota County Schools.

#### Condition:

The portables at Gocio Elementary house 485 students on a campus with 1069 students—nearly half the enrollment. This is a chronic condition that will only be addressed with a new classroom wing.

### Funding

#### Budget:

\$10,000,000

Note: Project budget will be revised in future capital plans as the scope

#### CIP Funding Years:

2017/2018



# NP Suncoast Technical College

## CIP PROJECT SUMMARY

### Description

#### Scope:

Plan, design, and construct a technical college in North Port. The campus includes a library and conference center in partnership with Sarasota County and the City of North Port.

#### Project Status

Planning and design underway.  
Intent to open by no later than January 2018.

### Assessment

#### Goal:

Meet Goal 1, Policy 1.1, 1.2, and 1.3 by developing a technical college with a joint-use library and conference center in the City of North Port.

#### Condition:

New college. Undeveloped land.

### Funding

#### Budget:

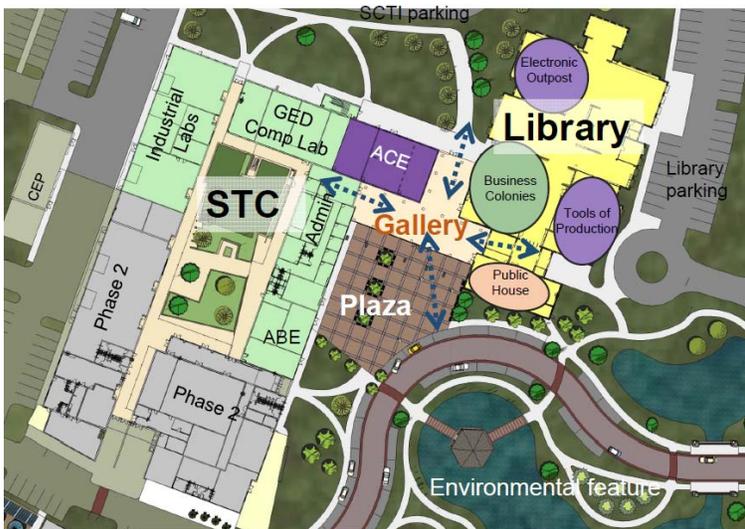
\$17,259,156 total Phase 1 CIP budget

\$7,500,000 total Phase 2 CIP budget

#### CIP Funding Years:

2016/2017—final budget year for Phase 1

2019/2020—Phase 2



# Oak Park Entryway

## CIP PROJECT SUMMARY

### Description

#### Scope:

Create a single point of entryway, improve access control, visitor seating area, and improved front office.

#### Project Status

Planning and design.

### Assessment

#### Goal:

Meet Goal 3 Policy 3.1 by renovating the Oak Park main office entrance to limit visitor access to the student side of the campus.

#### Condition:

Student safety and security concern with an open campus and a vulnerable student population that needs extra care and supervision.

### Funding

#### Budget:

\$200,000

#### CIP Funding Years:

2016/2017



# Pine View Classroom Wing

## CIP PROJECT SUMMARY

**Description**

**Scope:**  
Provide permanent student classroom space for students at Pine View currently placed in temporary portables.

**Project Status**  
Pre-planning and project scope development.

**Assessment**

**Goal:**  
Meet Goal 1, Policy 1.2 and Goal 2, Policy 2.2 and 2.3 by providing permanent student stations that meet the demands for educational services in Sarasota County Schools.

**Condition:**  
The main campus holds 1300 students capacity. However the current enrollment with 52 portables is 2140 students. This is a chronic condition that will only be addressed with a new classroom wing.

**Funding**

**Budget:**  
\$20,000,000

Note: Project budget will be revised in future capital plans as the scope of the project is better defined.

**CIP Funding Years:**  
2018/2019



## Pine View Elementary Offices

### CIP PROJECT SUMMARY

#### Description

##### Scope:

Create an office space for Pine View elementary school Assistant Principal and staff close to the elementary school section of the school.

##### Project Status

Planning and design.

#### Assessment

##### Goal:

Meet Goal, Policy 1.2, Goal 2, Policy 2.2 and Goal 3 by improving the facilities and overall condition of the campus by placing elementary student offices near their classrooms.

##### Condition:

Student safety and security.

#### Funding

##### Budget:

\$100,000

##### CIP Funding Years:

2016/2017



# Pine View HVAC & Interior Renovation

## CIP PROJECT SUMMARY

**Description**

**Scope:**  
Complete HVAC renovation including new central energy plant, chillers, air conditioning equipment and ductwork. Also to include exterior wall remediation and all new interior

**Project Status**  
Underway. Project is on schedule and in budget.

**Assessment**

**Goal:**  
Meet Goal 2, Policy 2.2 by developing install a new HVAC system on the Pine View campus.

**Condition:**  
Matrix Assessment at the time this project was planned was a 75 and was in the top five highest condition assessments.

**Funding**

**Budget:**  
\$18,875,000 — Total Project Budget

**CIP Funding Years:**  
2016/2017



# Pine View School Core

## CIP PROJECT SUMMARY

### Description

#### Scope:

Upgrade and expand the Pine View core facilities such as campus cafeteria and kitchen.

#### Project Status

Pre-planning and project scope development.

### Assessment

#### Goal:

Meet Goal 1, Policy 1.2 and Goal 2, Policy 2.2 by ensuring that the campus has sufficient core facilities to meet the needs of its students

#### Condition:

Current kitchen and cafeteria were designed to support the main campus of 1300 students capacity. However the current enrollment cap is 2250 students.

### Funding

#### Budget:

\$7,000,000

Note: Project budget will be revised in future capital plans as the scope

#### CIP Funding Years:

2020/2021



# Portable Repair

## CIP PROJECT SUMMARY

### Description

#### Scope:

Repair older wood portables in order to address maintenance needs and save the District from having to pay for the cost to replace them.

#### Project Status

Maintenance on portables scheduled for summer 2016.

### Assessment

#### Goal:

Meet Goal 2, Policy 2.2 by ensuring students have well maintained classroom spaces.

#### Condition:

Maintenance. Several of the oldest wood portables will be replaced. This project will help fund needed maintenance on some those that remain.

### Funding

#### Budget:

\$250,000

#### CIP Funding Years:

2016/2017



# Sarasota High Building 6

## CIP PROJECT SUMMARY

### Description

#### Scope:

Renovate and repair Sarasota High School's weight room and field house

#### Project Status

Planning and design.

### Assessment

#### Goal:

Meet Goal 2, Policy 2.2 by providing well maintained campus facilities and student spaces.

#### Condition:

Maintenance. This building renovation will address maintenance issues as well as inefficient design which does not lend itself to the current use of the program.

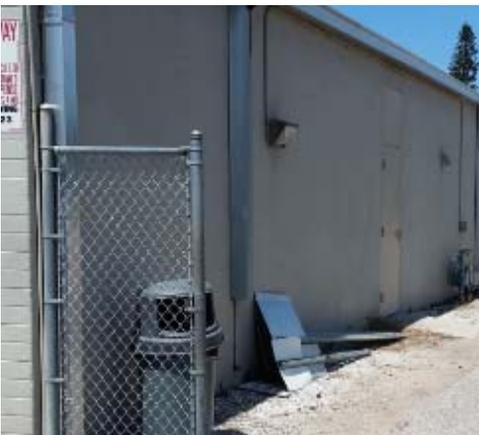
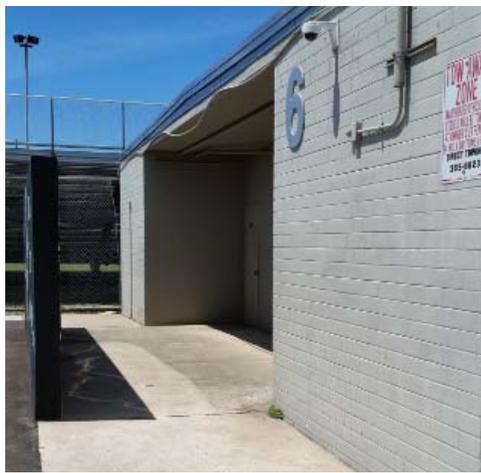
### Funding

#### Budget:

\$600,000.

#### CIP Funding Years:

2016/2017



# School Site Purchases

## CIP PROJECT SUMMARY

### Description

#### Scope:

Purchase land for two future elementary school sites and one high school site in order to meet the future growth demands of Sarasota County.

#### Project Status

Real estate searches and negotiations with developers.

### Assessment

#### Goal:

Meet Goal 1, Policies 1.2 and 1.3 by ensuring school capacity provides for the demands of growth and development.

#### Condition:

New school. Undeveloped land.

### Funding

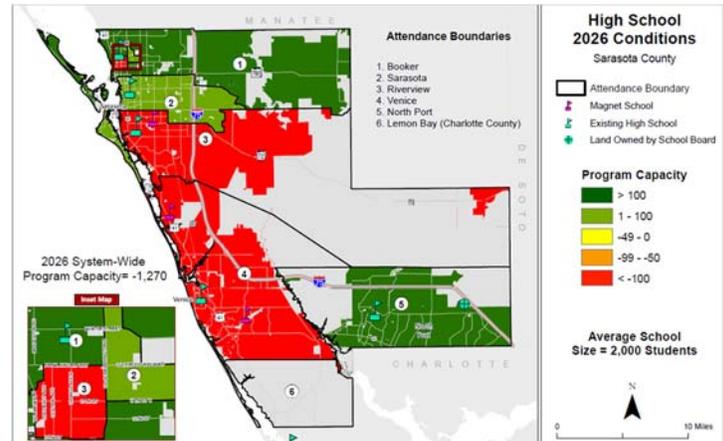
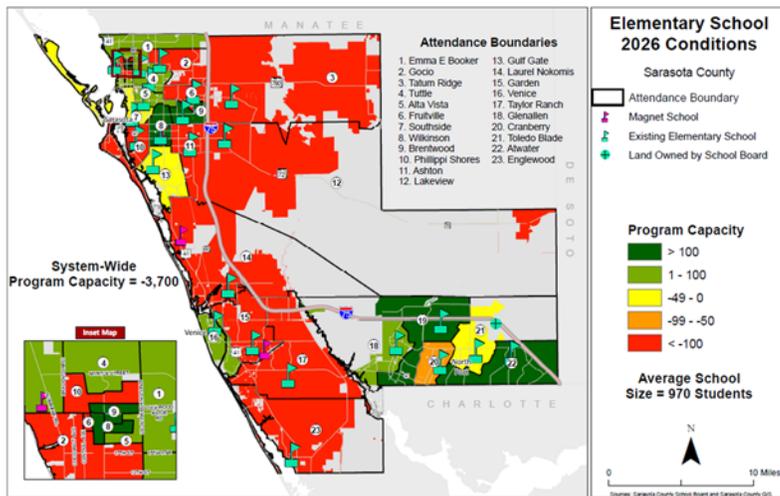
#### Budget:

\$12,500,0000

- \$2,500,000 for each of two elementary schools
- \$7,500,000 for a high school

#### CIP Funding Years:

2016/2017 and 2019/2020



## CIP PROJECT SUMMARY

### Description

#### Scope:

Providing innovative, technology enhanced, collaborative learning spaces tailored to the specific needs of all students attending Sarasota County High Schools.

#### Project Status

Project is being developed in new classrooms and enhanced in existing TEL Studios. Currently Booker High has 3, Sarasota High has 3, Venice has 4, and Riverview, North Port, and Pine View have 1 each.

### Assessment

#### Goal:

Meet Goal 4, Policy 4.2 by providing high school students technology-based education.

#### Condition:

New and enhanced technology installation within high school academic classrooms.

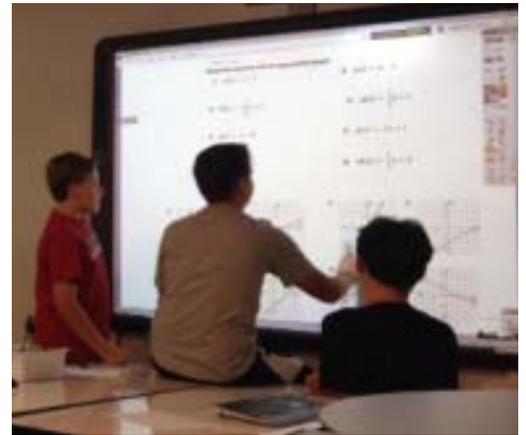
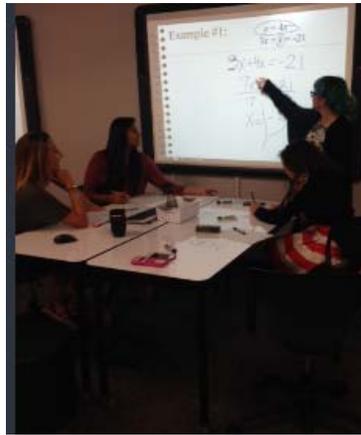
### Funding

#### Budget:

\$100,000 annually;  
\$500,000 total in 5 –year CIP

#### CIP Funding Years:

2016/2017, 2017/2018;  
2018/2019; 2019/2020;  
2020/2021



## Venice High Bleachers

### CIP PROJECT SUMMARY

#### Description

##### Scope:

Purchase and install temporary bleachers with seating capacity of about 500 to accommodate peak game attendance.

##### Project Status

Planning. Installation expected in summer 2016.

#### Assessment

##### Goal:

Meet Goal 2, Policy 2.2 by providing for well functioning student spaces and resources.

##### Condition:

Campus maintenance and facility provision.

#### Funding

##### Budget:

\$100,000

##### CIP Funding Years:

2016/2017



# Venice High Classroom Wing

## CIP PROJECT SUMMARY

### Description

#### Scope:

Construct a new student station wing on the VHS campus in order address increasing enrollments in Sarasota County and, in particular, the Venice area

#### Project Status

Planning and scope development.

### Assessment

#### Goal:

Meet Goal 1, Policy 1.1 by ensuring the school capacity meets the population demands of the local community.

#### Condition:

New construction. Expanded campus to address growth and development demands in the Venice High School attendance zone.

### Funding

#### Budget:

\$12,000,000

Note: Project budget will be revised in future capital plans as the scope of the project is better defined.

#### CIP Funding Years:

2019/2020 and 2020/2021



# Venice Middle Campus Refresh

## CIP PROJECT SUMMARY

### Description

#### Scope:

Upgrade the campus by: installing a new HVAC system, entrance way, and administrative offices, replacing partition walls and security system, and upgrading arts and music facilities.

#### Project Status

Planning and design. Architect and CM selected. Construction expected to commence in Summer 2017.

### Assessment

#### Goal:

Meet Goal 1, Policy 1.2 and Goal 2, Policy 2.2 by providing for a campus programs and facilities that meets the needs of the school and demands of the community.

#### Condition:

The Condition Matrix Score is 63. The campus is thirty years old, has an old HVAC system, demountable partition walls, and inefficient lighting, and poorly designed program space.

### Funding

#### Budget:

\$12,500,000 — Total Project Budget

#### CIP Funding Years:

2016/2017 and 2017/2018



# Venice Middle Track and Field Facilities

## CIP PROJECT SUMMARY

**Description**

**Scope:**  
Contribute towards the renovation of Venice Middle’s track and field facilities in partnership with Sarasota County parks

**Project Status**  
Planning and scope development.

**Assessment**

**Goal:**  
Meet Goal 1 Policy 1.2 and 1.3 by providing program facilities that meet the needs of the student population and collaborate on facility projects that support the overall community.

**Condition:**  
New construction. Expanded campus.

**Funding**

**Budget:**  
\$1,000,000 with additional contributions from Sarasota County Parks.

Note: Project budget will be revised in future capital plans as the scope of the project is better defined

**CIP Funding Years:**  
2018/2019







**Chapter 5: Conclusion & Appendixes**  
*Providing for Excellence in Education*

## **Conclusion**

The 2016/17 Five-year CIP seeks to establish a capital plan and budget that meets the needs of Sarasota County by: 1) implementing the School Board planning goals and strategies, 2) addressing acknowledged facility needs and conditions, 3) providing for current student needs and future enrollment demands, and 4) prioritizing capital improvement projects for funding through the capital budget. By planning for capital facility needs and demands, the CIP helps Sarasota County Schools ensure that they will have the facilities to continue providing for the excellent educational services the citizens and businesses of Sarasota County expect.

The capital projects identified within this report meet the goals, identified condition needs, and planning priorities identified by the stakeholders through the 2016/17 CIP planning process. The projects seek to address needs related to future growth demands, maintenance and operations, safety and security, and technology. The selected projects are deemed to be highest priority for development of projects. In doing so, they help ensure that the Sarasota County Schools are able to provide its citizens and businesses a high level of educational facilities and services.

## **Appendixes**

In support of the 2016/17 Five-year CIP, the following materials can be found as part of attached appendixes:

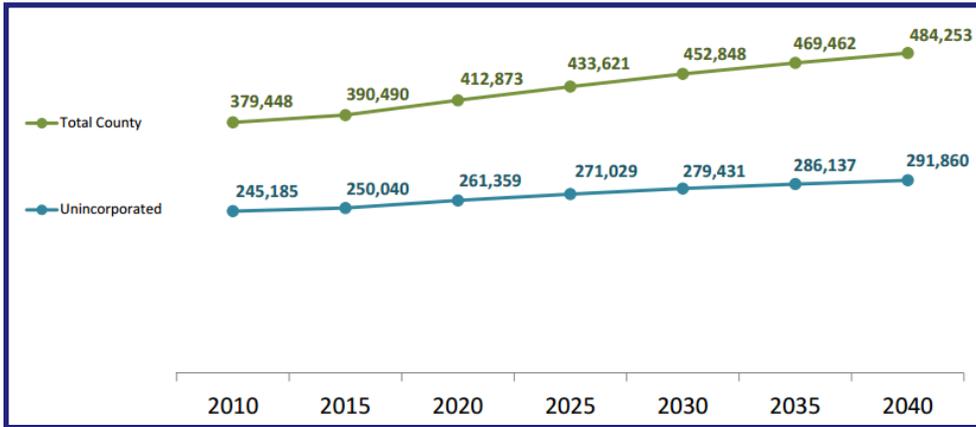
1. County Demographics
2. Capital Planning Process
3. Condition Assessment Tools
4. School Planning State Regulatory Framework
5. Glossary

## Appendix 1: County and School Demographics

As discussed in Chapter 1: Planning Overview, Sarasota County is predominantly an older, retirement community. Indeed a third of the County’s population is age 65 and over. Even as Sarasota County continues to be a retirement community, the overall growth of the County will result in an increase demand for educational services. Indeed, current estimates are that an additional 2,000 new students will enter the District in the next five-years and nearly 15,000 new students by 2040.

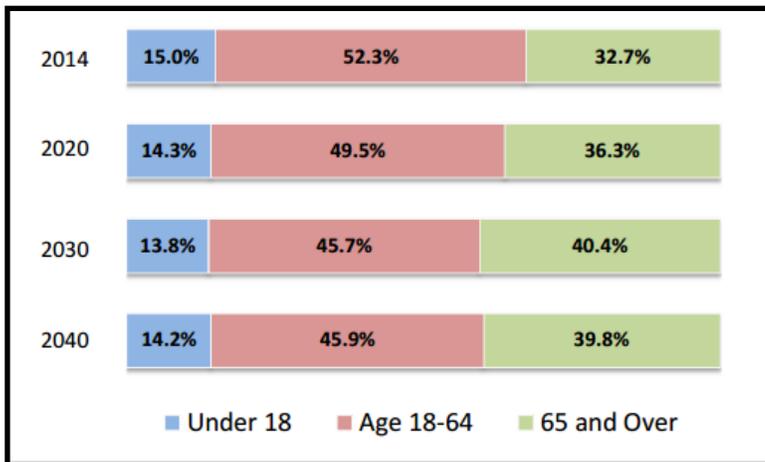
The following set of Sarasota County and Sarasota County Schools demographic data highlights this juxtaposition of an older age population and school demand.

Figure A-1: Sarasota County Population Projections 2015-2040



Source: BEBR, Sarasota County

Figure A-2: Sarasota County Population by Age Group



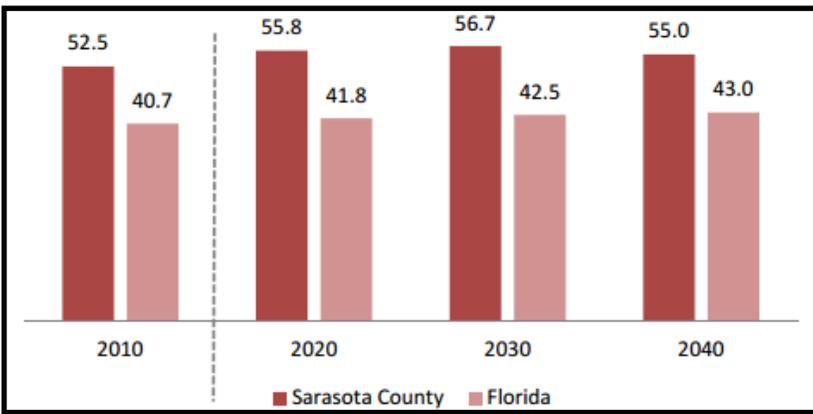
Source: BEBR, Sarasota County

Table A-1: Sarasota County –v– State of Florida by Age Group

Age	Sarasota			Florida		
	2010	2012	2014	2010	2012	2014
Under 5 years	3.9	3.8	3.7	5.7	5.6	5.5
5 to 19 years	1.7	13.4	12.9	18.3	17.6	17.3
20 to 34 years	12.2	12.5	12.7	18.7	19.2	19.3
35 to 49 years	16.6	15.5	14.6	20.4	19.5	18.7
50 to 64 years	22.4	22.3	22.1	19.6	19.9	20.1
65 and older	31.2	32.5	33.9	17.3	18.2	19.1

Source: BEBR, Sarasota County

Figure A-3: Sarasota County and State of Florida Median Ages



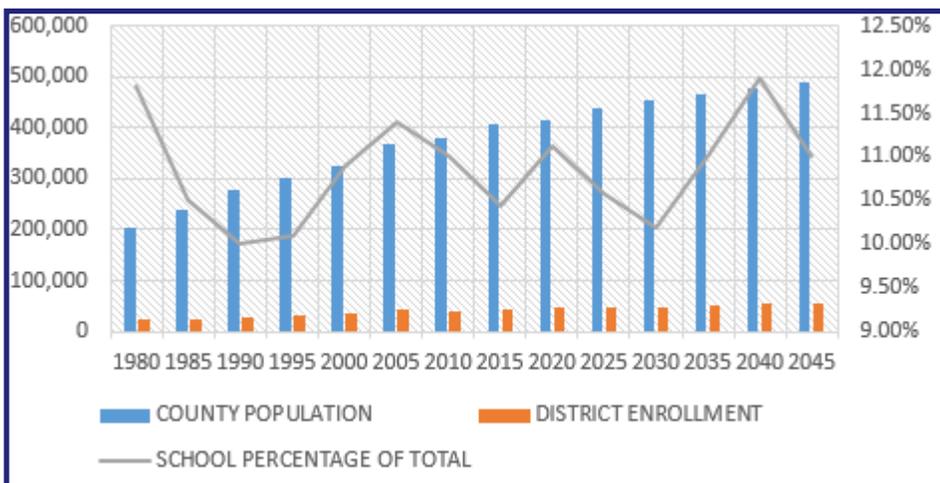
Source: BEBR, Sarasota County

Table A-2: Sarasota County Population—School Enrollment Growth

YEAR	COUNTY POPULATION	YEARLY GROWTH	SCHOOL ENROLLMENT	YEARLY GROWTH
2005	367,867	2.63%	41,861	1.78%
2006	379,386	3.04%	41,843	-0.04%
2007	387,461	2.08%	41,967	0.30%
2008	393,608	1.56%	41,020	-2.31%
2009	389,320	-1.10%	41,165	0.35%
2010	379,448	-2.60%	40,695	-1.15%
2011	382,213	0.72%	41,429	1.77%
2012	386,147	1.02%	41,494	0.16%
2013	387,140	0.26%	41,542	0.12%
2014	396,962	2.47%	41,874	0.79%
2015	405,549	2.12%	42,360	1.15%
<b>Average Annual Growth</b>		<b>0.87%</b>		<b>0.21%</b>

Source: BEBR, Sarasota County, US Census, SDSC Budget Office

Figure A-4: Sarasota County and District Enrollment



Source: BEBR, Sarasota County, US Census, SDSC Budget Office

Table A-3: Sarasota County—State of Florida Ethnicity

Ethnicity	COUNTY	STATE
White	90.20%	75.00%
African American	4.70%	16.00%
Native American	0.20%	0.30%
Asian	1.30%	2.30%
Other Race	2.00%	5.10%
Two or More Races	1.60%	2.40%

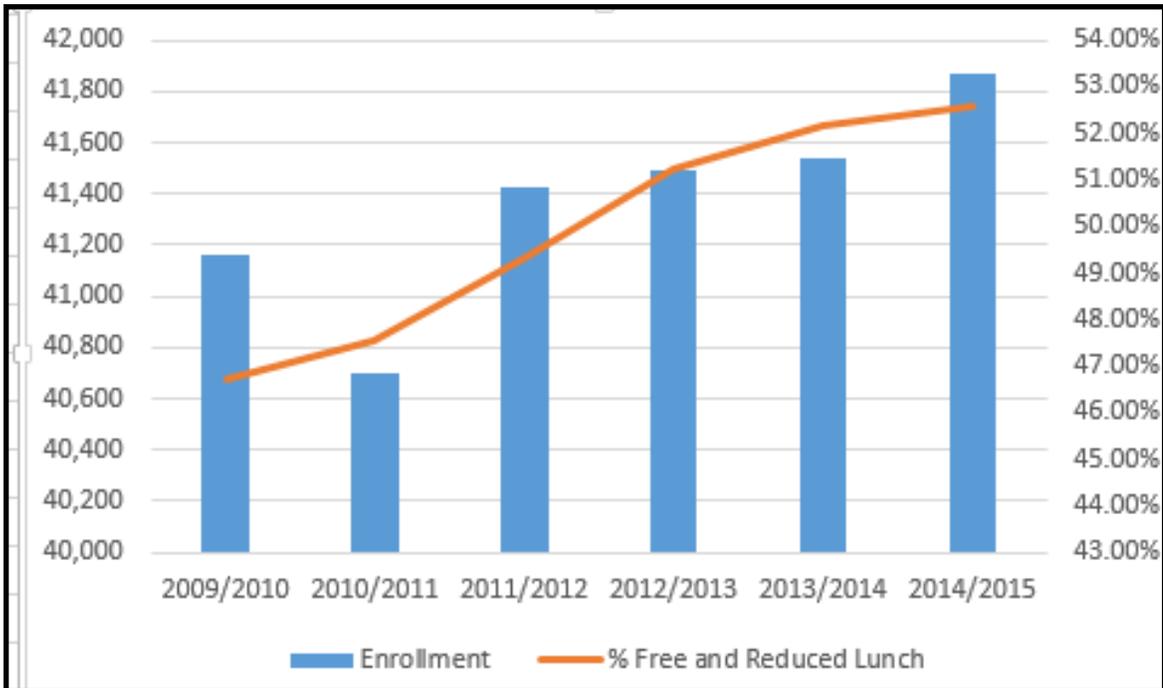
Source: BEBR, US Census

Table A-4: Sarasota County School Student Ethnicity

Ethnicity	1990	1997	2005	2011	2013	2015
White	86%	82%	74%	67%	65%	65%
Black	11%	10%	9%	9%	9%	9%
Hispanic	3%	5%	11%	16%	18%	19%
Asian	2%	1%	2%	2%	2%	2%
Native American	<1%	1%	<1%	<1%	<1%	<1%
Multi	n/a	n/a	4%	5%	5%	4%

Source: SDSC Budget Office

Figure A-5: Sarasota County School Free and Reduced Lunch



Source: Sarasota County Food Service

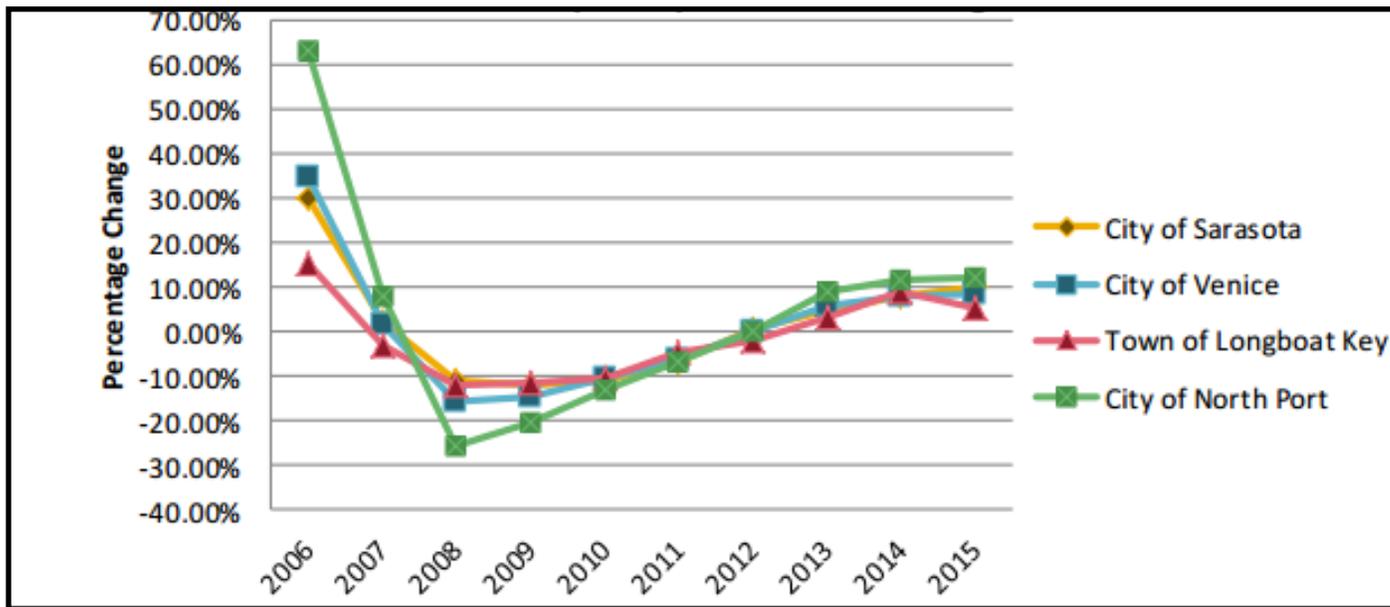
As one can see from the County population and School enrollment demographic data, over the course of the last decade, Sarasota County and its schools experienced a population and growth downturn that it is now steadily rebounding from. Considering that growth and development are major drivers of Sarasota County’s economy, it is understandable why this dip in local development and growth would cause a dip in the local economy. The following set of data shows the affect the development downturn and rebound has had on the real estate market, taxable values, and school revenues.

Table A-5: Sarasota County—Local Jurisdictions Market Values

Year	Unincorporated Sarasota County		City of Sarasota		City of Venice		Town of Longboat Key		City of North Port	
	Value	% Change	Value	% Change	Value	% Change	Value	% Change	Value	% Change
2006	\$84,021	31.05%	\$15,015	29.99%	\$5,577	34.58%	\$5,661	15.48%	\$6,494	63.21%
2007	\$86,073	2.44%	\$15,349	2.22%	\$5,679	1.83%	\$5,497	-2.90%	\$7,029	8.24%
2008	\$73,097	-15.08%	\$13,662	-10.99%	\$4,796	-15.55%	\$4,826	-12.21%	\$5,221	-25.72%
2009	\$62,269	-14.81%	\$12,005	-12.13%	\$4,088	-14.76%	\$4,088	-11.40%	\$4,162	-20.28%
2010	\$55,668	-10.60%	\$10,693	-10.93%	\$3,674	-10.13%	\$3,674	-10.24%	\$3,616	-13.12%
2011	\$51,987	-6.61%	\$9,995	-6.53%	\$3,451	-6.07%	\$3,451	-4.77%	\$3,377	-6.61%
2012	\$51,423	-1.08%	\$10,075	0.80%	\$3,454	0.09%	\$3,454	-1.97%	\$3,377	0%
2013	\$54,470	5.93%	\$10,545	4.67%	\$3,667	6.17%	\$3,667	3.21%	\$3,683	9.06%
2014	\$59,884	9.94%	\$11,367	7.80%	\$3,967	8.18%	\$3,967	9.17%	\$4,116	11.76%
2015	\$65,508	9.39%	\$12,487	9.85%	\$4,310	8.65%	\$4,310	5.45%	\$4,619	12.22%

Source: Sarasota County Property Appraiser

Figure A-6: Sarasota County—Local Jurisdictions Market Values



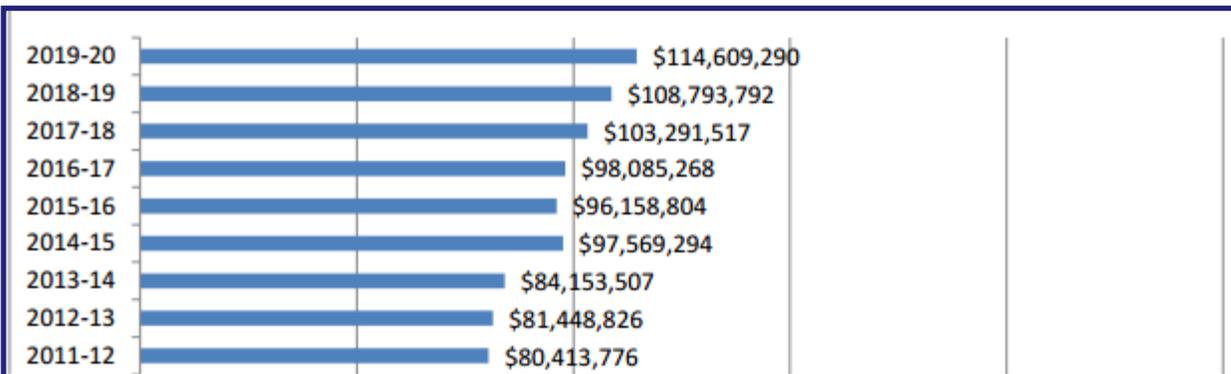
Source: Sarasota County Property Appraiser

Table A-6: Sarasota County Taxable Values

Year	Taxable Values (\$billions)	% Change
2006	58,915,000,000	26.83%
2007	62,663,000,000	6.36%
2008	53,151,000,000	15.18%
2009	46,539,000,000	12.44%
2010	42,205,000,000	9.31%
2011	39,635,841,560	6.26%
2012	39,129,815,981	1.10%
2013	40,755,531,807	4.15%
2014	43,458,351,313	6.63%
2015	46,542,124,786	7.10%

Source: Sarasota County Property Appraiser

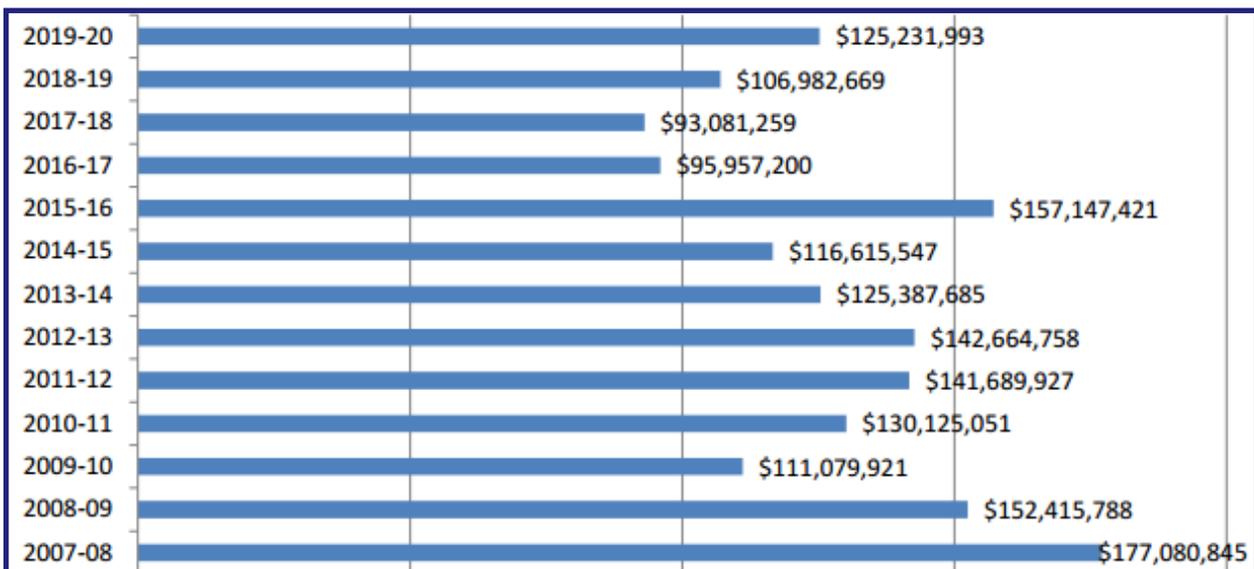
Figure A-7: Sarasota County Schools Capital Funds and Estimated Revenues 2011/2012—2019/2020



Source: SCSB Budget Office

Note: Revenues do not include an estimated \$2—\$3 million that will be generated from the newly reinstated impact fees on annual basis.

Figure A-8: Sarasota County Schools Capital Fund Actual and Estimated Appropriates 2007/2008—2019/2020



Source: SCSB Budget Office

## **Appendix 2: Capital Planning Process**

The Capital Planning process seeks to engage a variety of public education stakeholders—School Board members, Executive Directors, district operation staff, school administration personnel, and community members—in a discussion about the District’s capital facility needs and demands. Recognizing the importance that this process has on the delivery, function, and effectiveness of the District’s educational programs, the Planning Department, along with the Deputy Superintendent of Schools and District Capital Improvement Team (CPT), has sought to make the capital planning process better by:

1. Improving the initial project identification and planning process by increasing the accuracy of the project scope and budget, enhancing opportunities for stakeholder involvement, and making the planning process and materials more understandable and readable for all stakeholders;
2. Ensuring that the proposed projects have been well vetted, assessed according to measurable data, and given enough time to be thoroughly evaluated; and
3. Increasing opportunities for the School Board to provide input and direction into the process.

In working to make these improvements, the CPT sought to better define the Capital Planning Process.

Capital Budget / Planning Tasks: These capital planning tasks identify who needs to be involved with the planning process. Such tasks include:

- Coordinating with state regulations;
- Collaborating with local governments, community stakeholders, school stakeholders, and Executive Directors;
- Identifying and prioritizing school, departmental, and District facility needs;
- Confirming and implementing the District’s goals and priorities;
- Assessing the project needs and demands;
- Evaluating and confirming project deliverables and costs; and
- Submitting budgets and plans to the School Board.

In order to make these process improvements, the CPT has accelerated the schedule up so that capital planning efforts start earlier and continues through the approval of the CPT/Small Projects by the Executive Directors and presentation of the draft Five-year CIP to the Board in April. CIP/Major Projects are projects such as new construction and property development, major remodeling, major site work, and HVAC and related systems whose costs are over \$50,000. CIP/Major Projects are generally completed by an outside contractor with the support and direction of district staff. CPT/Small Projects concern important, but less expensive, facility projects. Such projects are primarily renovations and remodeling of existing spaces or campus enhancements that generally cost less than \$50,000. CPT/Small Projects may be completed by district staff or contracted out.

The following table highlights the major tasks in this updated planning process.

Table A-7 Capital Planning Process

	Capital Budget / Planning	CIP Projects	CPT/Small Projects
Starting in August	New project proposals submitted to CPT for review.	Initial Scope and Budget reviewed by contractors for new proposed projects budget estimate.	Planning, Design, and Project team determines project budget and preliminary design for new proposed projects.
	Planning, Design, and Project staff discuss new proposed project needs with stakeholders.		
	Initial Design, Scope, and Budget Developed for new proposed projects		
September	Board adopts budget with Five-year CIP.		Team reviews summer projects, and finalizes priorities for current year.
	Planning computes program capacities.		
	Team begins campus master plans and specialized studies.		
October	Planning computes mobility report.		
	FTE 2 occurs.		
	Class size report received.		
	Board-Capital Planning work sessions begin for following year CIP. Review priority needs.		
November	Planning receives and processes county and municipal CIPs.	Team reviews list of proposed projects	Team reviews list of proposed projects
	Proposed projects submitted to Team Board-Capital Planning work sessions for next year's CIP - review student enrollment projections.		
December	Budget Office submits official enrollment projections for next year to DOE.		
	Planning completes the space utilization study.		
January	Proposed projects reviewed by CPT and Executive Directors	Team prioritizes CIP for next year	Team reviews proposed CPT /Small Projects.
	Capital Projects Matrix is updated.		
	Board-Capital Planning work sessions for next year's CIP - review Board priorities and concerns.		
February	Team reviews short- and long-term instructional initiatives for facility issues.	Team reviews Draft Five-year CIP projects	Team awards CPT/Small Projects.
	FTE 3 occurs.		
March	Budget Office finalizes school-based projections.	Team works on summer projects	Team works on summer projects
	Planning prepares CIP draft incorporating latest Board goals.		
	Board-Capital Planning work sessions for next year's CIP - review draft Five-year CIP projects		
April	Team analyzes all campuses to ensure sufficient student stations.	Team reviews progress.	Design-Build contracts are undertaken for projects to be completed during the summer.
	Board-Capital Planning work sessions for next year's CIP - review draft Five-year CIP		

Table A-7: Capital Planning Process, continued

May	Team processes new statutes from Legislature.		Team reviews progress.
June	FTE 4.	Summer projects begin	Summer projects begin.
July	FTE 1. Board adopts tentative budget.	Crews complete projects and begin commissioning for new buildings.	Crews complete summer projects.
August	Planning updates classroom changes; performs day-5 analyses of enrollments and facilities. Budget Office coordinates staffing and facility changes.	New instructional spaces open.	Small projects are completed.

### Appendix 3 : Condition Assessment Tools

As explained in Chapter 1: Planning Overview, staff utilizes two tools—a Capital Projects Matrix and Facilities Conditions Table to help quantifiably assess proposed projects. The Capital Projects Matrix is applied at the campus level and the Facilities Conditions Index applied at the building level. These planning tools enable staff to quantify whether a capital project accomplishes the Board’s goals by assisting with the physical evaluation of proposed capital projects. The tools assess a facility’s capacity, age, condition, cost of maintenance and repairs, and level of security. Facilities that have high Matrix or FCI numbers provide the impetus for further evaluating whether such projects should receive CIP funding.

The following are examples of these tools.

Table A-8: 2009/2010 Capital Projects Matrix

School	Signif Capacity Needs	Duration of Over- Capacity	Age of Reloc	Projected 5-Year Core Sta- tus	Cost of Maint. Projects Pending	Utility Costs	Past 5 Years' Invest	Facility Index	Security CPTED Analysis	2009 Total
<b>weight</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>5</b>	
Riverview HS	0	1	0	3	0	8	0	0	0	95
Venice HS	2	0	5	0	25	10	0	20	25	93
SCTI-Main	4	n/a	5	0	25	8	6	16	25	85
Booker HS	2	0	1	0	25	6	6	20	25	81
Sarasota HS Bldg 42	n/a	n/a	n/a	n/a	15	8	10	20	25	78
Sarasota HS Bldg 5	n/a	n/a	n/a	n/a	15	8	10	20	25	78
Toledo Blade	5	0	5	0	0	8	0	0	20	78
Sarasota HS west	n/a	n/a	n/a	n/a	25	8	0	16	25	77
Sarasota HS Bldg 4	n/a	n/a	n/a	n/a	15	8	10	16	25	74
Bay Haven bldg 4	n/a	n/a	n/a	n/a	10	10	10	20	20	70
Pine View	3	3	4	9	20	4	6	4	20	69
Sarasota MS	1	0	5	0	15	8	8	12	15	64
Bay Haven	1	2	0	6	10	10	6	8	20	63
Bay Haven cafeteria	n/a	n/a	n/a	n/a	10	10	10	12	20	62
Lakeview	3	5	0	9	0	10	2	4	15	59
Garden	4	5	5	6	0	8	8	4	10	56
Gocio	4	5	5	9	0	8	6	0	15	56
Laurel Nokomis	2	0	4	0	15	8	6	8	15	56
Booker MS	0	0	0	0	15	8	4	8	15	50
Infinity MS	5	0	5	3	0	6	10	4	25	50
Englewood	1	0	0	0	0	8	8	4	5	46
Fruitville	2	0	1	3	0	10	6	4	5	44
Ashton	2	5	2	6	0	8	2	4	5	42

Table A-9 2015/2016 Capital Projects Matrix

School	Signif Capacity Needs	Duration of Over- Capacity	Projected 5-Year Core Sta- tus	Cost of Maint. Projects Pending	Utility Costs	Past Five Years' Capital Invest	Facility Condition Index	2016 Se- curity CPTED Analysis	2016 Total
Pine View	2	3	9	20	6	6	16	15	<b>77</b>
Venice MS	2	0	0	20	4	10	12	15	<b>63</b>
Brentwood	0	0	0	20	4	10	20	0	<b>54</b>
Lakeview	3	5	6	0	8	8	8	15	<b>53</b>
Fruitville	2	5	6	10	6	8	4	10	<b>51</b>
Gocio	4	5	12	5	6	8	8	0	<b>48</b>
Englewood	1	0	3	15	6	10	12	0	<b>47</b>
Sarasota HS	1	0	0	10	4	0	12	20	<b>47</b>
Taylor Ranch	2	4	0	0	8	10	0	15	<b>39</b>
Ashton	2	5	9	0	8	10	4	0	<b>38</b>
Cranberry	2	3	6	0	6	10	4	5	<b>36</b>
North Port HS	1	0	0	0	4	8	8	15	<b>36</b>
Garden	3	5	9	0	6	8	4	0	<b>35</b>
Southside	1	0	9	0	6	10	8	0	<b>34</b>
E E Booker	2	0	0	0	6	10	4	10	<b>32</b>
Heron Creek	1	0	0	0	4	8	4	15	<b>32</b>
SCTI-Fire Acdmy		3	0	0	0	10	4	15	<b>32</b>
Brookside	0	0	0	0	4	8	4	15	<b>31</b>
Oak Park		0	0	0	8	8	0	15	<b>31</b>
Bay Haven	1	3	3	5	10	2	4	0	<b>28</b>
Glenallen	<u>1</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>4</u>	<u>8</u>	<u>0</u>	15	<b><u>28</u></b>
Sarasota MS	1	0	0	0	4	0	8	15	<b>28</b>
McIntosh	1	0	0	0	2	6	0	15	<b>24</b>
Tuttle	1	0	0	5	4	8	4	0	<b>22</b>
Alta Vista	0	0	0	0	8	8	0	5	<b>21</b>
Booker MS	0	0	0	0	6	0	0	15	<b>21</b>
Gulf Gate	0	0	0	0	1	10	4	5	<b>20</b>
Laurel Nokomis	1	0	0	0	4	0	0	15	<b>20</b>
Riverview HS	0	0	3	0	2	10	0	5	<b>20</b>
Suncoast Poly		0	0	0	10	10	0	0	<b>20</b>
Venice ES	1	0	3	0	2	10	4	0	<b>20</b>
Woodland MS	0	0	0	0	0	10	0	10	<b>20</b>
Lamarque	2	0	0	0	6	10	0	0	<b>18</b>
Phillippi Shores	0	1	3	0	4	10	0	0	<b>18</b>
SCTI-South		0	12	0	0	n/a	0	5	<b>17</b>
Tatum Ridge	1	0	3	0	2	10	0	0	<b>16</b>
Wilkinson	0	0	0	0	2	10	4	0	<b>16</b>
Toledo Blade	1	0	0	0	6	8	0	0	<b>15</b>
TRIAD		0	0	0	0	10	0	5	<b>15</b>
Atwater	0	0	0	0	0	10	4	0	<b>14</b>
SCTI-Main		5	0	0	0	0	0	0	<b>5</b>
Booker HS	0	0	0	0	4	0	0	0	<b>4</b>

Table A-10: 2013/2014 Facilities Condition Index

Site Name	Building Code	Facility Condition Index	Building Notes	Site Name	Facility Condition Index
Southside Elementary	021-05	39	Media center	Brentwood Elementary	35
Sarasota High	007-42	36	not needed?	Pine View	27
Brentwood Elementary	013-12	32	small out building	Venice Middle	21
Pine View	004-01	30	funded project	Sarasota High - West	21
Pine View	004-04	30	funded project	Englewood Elementary	20
Pine View	004-02	30	funded project	Sarasota High - East	16
Brentwood Elementary	013-01	29	funded project	Gocio Elementary	14
Venice Middle	047-04	28	funded project	North Port High	13
Sarasota High	005-15	28	Auditorium	Southside Elementary	13
Pine View	004-03	27	funded project	Lakeview Elementary	12
McIntosh Agriculture	036-16	26		Heron Creek Middle	10
Ashton Elementary	034-07	26	small electrical vault building	Ashton Elementary	10
Sarasota High	005-18	25	Small bld behind east cafeteria	Bay Haven	9
Sarasota High	007-06	25	field house/funded project	Garden Elementary	9
Southside Elementary	021-01	23	main building	Landings	9
Englewood Elementary	015-06	23	funded project	Gulf Gate Elementary	9
Sarasota High	005-19	23	old gym east campus	Emma E. Booker	9
Venice Middle	047-03	22	funded project	Brookside Middle	8
Englewood Elementary	015-05	22	funded project	Fruitville Elementary	8
Brentwood Elementary	013-11	22	funded project	Tuttle Elementary	8
Venice Middle	047-05	21	funded project	Venice Elementary	7
Venice Middle	047-02	21	funded project	Wilkinson Elementary	7
Emma E Booker Elementary	051-11	20	security house	Cranberry Elementary	7
Gocio Elementary	025-02	20	funded project	Construction and Facilities	6

#### **Appendix 4: School Planning State Regulations**

The State of Florida, by statute and rule, exercises considerable control over the education of students throughout Florida's 67 counties. Public educational facility requirements are found in Chapter 1013, Florida Statutes.

- Section 1013.35 sets forth the requirements for the "Tentative District Educational Facilities Plan" including:
- Planning in 5-year, 10-year, and 20-year increments
- Coordinating with local government comprehensive plans
- Projecting student enrollments based upon state and local data
- Anticipating expansions or closures of existing schools
- Projecting facility needs
- Sharing information on leased and owned relocatables
- Describing general locations of future school sites
- Listing options for reducing the construction of permanent student stations
- Scheduling major repair and renovation projects
- Scheduling anticipated capital revenues

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

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

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

The district's current Educational Plant Survey was approved by FDOE in June, 2011 and is available in the Planning office. This document verifies which of the district's intended capital projects are "survey approved" and therefore eligible to be funded by state revenues. The Planning Department is in the process of completing the required five-year update of the Educational Plant Survey and will be completed later this spring.

Section 1013.33, F.S., repeats the requirements of s. 163.3177, F.S., which mandates an interlocal agreement [ILA] between local governments and district school boards for school facility planning. The original 2002 statute required processes to:

- Ensure agreement on population and student enrollment projections;
- Coordinate school districts' plans to construct, enlarge, or close educational facilities;
- Coordinate local government plans for development and redevelopment;
- Collaborate on the timing and costs to provide onsite and offsite infrastructure improvements to support school facilities;

- Allow the local government to comment on the school district's five-year facilities work plan and the plant survey;
- Allow the school district to share the potential impact of proposed residential development on school capacity;
- Encourage the co-location and joint use of school facilities with community amenities; and
- Implement an oversight component.

In Sarasota County, the school district, county, and all four municipalities adopted the original Interlocal Agreement on School Facility Planning in May, 2004. The then Florida Department of Community Affairs [DCA] approved the document effective July 2004. Since then a staff working group of planning representatives from each entity has met periodically to implement the ILA requirements. Each party to the agreement has appointed a citizen to an oversight committee that reviews implementation of the ILA and issues a report yearly. The county's legislative bodies of all parties convened yearly to review and amend the ILA as needed from 2005 through 2009, and again in 2013 and 2014,. The 2010, 2011, and 2012 Convocations were cancelled due to the lack of critical action items. However, following the increased growth and development activity, the Convocation has been held once again in 2013,2014, 2015, and 2016.

The 2005 Legislative Session amended the ILA statutes to require that all local governments revise their comprehensive plans to adopt school concurrency by December 2008. Later in 2005, Sarasota County and the School District of Sarasota County volunteered to be, and were subsequently appointed by DCA as, one of six pilot communities for the adoption of the school concurrency requirements. The county and school district each received \$100,000 to provide consultants to conduct data and analysis of school capacities and to revise both the ILA and the relevant comprehensive plan elements. The pilot project was completed September 1, 2006, with the submission of four work products to DCA. The ILA was amended early in 2008 to allow School Concurrency to be implemented October 1<sup>st</sup>. Since then, the district's Planning staff has worked closely with each local government's planning office to ensure that all proposed residential developments comply with this requirement. The Planning Department is working with its local government to update the School Concurrency Element and ILA and intend to have updates adopted early next year.

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

## **Appendix 5: Glossary**

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

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

**BEBR** – the Bureau of Economic and Business Research, an applied research center at the University of Florida. BEBR's Mission is to:

- Collect, analyze and generate economic and demographic data on Florida and its local areas.
- Conduct economic, demographic and survey research that will inform public policy and business decision making.

To distribute data and research findings throughout the state and the nation.

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

**Capital Improvement Plan** — the document that sets forth the District's capital goals, priorities, and planning practices related to the provision, maintenance, funding, and operation of its capital facilities and resources over the course of a five-year period.

**Capital Improvement Program** — the document that identifies the District's priorities for implementing its Capital Improvement Plan by establishing funding priorities for current and future capital improvement projects over the course of a five-year program.

**Capital Projects Matrix** — a matrix that helps assess the condition of the overall school campus by assessing issues related to a school facility's capacity, age, condition, cost of maintenance and repairs, and level of security .

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

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

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

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

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

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

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

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

**Facility Condition Index**— a matrix that helps assess the condition of a particular school facility or buildings by assessing issues related to a school facility’s capacity, age, condition, cost of maintenance and repairs, and level of security .

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

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

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

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

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

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

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

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

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

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

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

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

**Portable** -- see "Relocatable"

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

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

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

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

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

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

**SDSC** -- the School District of Sarasota County.

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

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

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

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

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

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

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

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