

Nancy Kline, Superintendent of Schools

THE SCHOOL BOARD OF MARTIN COUNTY, FLORIDA



500 East Ocean Blvd • Stuart, Florida 34994 • Telephone (772) 219-1200 Ext: 30200 • Facsimile: (772) 219-1231

AGENDA

SCHOOL BOARD WORKSHOP

Tuesday September 18, 2012 – 5:30 p.m.

School Board Meeting Room

500 E. Ocean Boulevard

Stuart, FL 34994

Call to Order by the Chairman and Pledge of Allegiance to the Flag of the United States

1. Adoption of the Agenda
2. Martin County School Impact Fees – Technical Report Review (P. 3 – P. 13)
3. Adjourn

NOTICE OF RIGHT TO JUDICIAL REVIEW:

A party who is adversely affected by this Final order is entitled to Judicial review pursuant to Section 120.68 Florida Statutes. Review proceedings are governed by the Florida Rules of Appellate Procedure. Such proceedings are commenced by filing one copy of a Notice of Appeal with the School Board Clerk and a second copy accompanied by filing fees prescribed by law, with the District Court, Fourth District. The Notice of Appeal must be filed within 30 days of rendition of the order to be reviewed accurately and completely preserve all testimony in the proceedings, and, on the request of any party, it shall make a full or partial transcript available at no more than actual costs.

Accommodations are available for persons with special needs. Please call 219-1200 X 30425 for assistance.

School Board Members: Dr. David I. Anderson – Maura Barry-Sorenson – Michael Busha - Laurie Gaylord – Susan J. Hershey
Student Representative: Rachel Ethridge

“An Equal Opportunity Agency”



UPCOMING MEETING SCHEDULE

Meetings are held in the School Board Meeting Room unless otherwise noted

REGULAR MEETINGS

Tuesday, September 18, 2012 – 6:00 p.m.

Tuesday, October 16, 2012 – 6:00 p.m.

ANNUAL/REGULAR MEETING

Tuesday, November 20, 2012 – 6:00 p.m.

WORKSHOP

Tuesday, September 18, 2012 – 5:30 p.m.

JOINT MEETINGS

Tuesday, January 8, 2013 – 9:00 a.m. to 12:00 p.m. (City of Stuart Chair) – *Blake Library*

Tuesday, June 18, 2013 – 9:00 a.m. – 12:00 p.m. (School Board Chair) – *Blake Library*



**School Board of Martin County
Agenda Item Request Form
Board Workshop: September 18, 2012**

Agenda Item # 2

1. **AGENDA ITEM:** Martin County School Impact Fees – Technical Report – Workshop Review
X appropriate box(s): New Renewal Addenda Presentation Grant \$ _____

2. **BACKGROUND INFO./STAFF RECOMMENDATION:** This is a Workshop item to present the Technical Report, and to recap the recommendations from the Martin County Impact Fee Committee meeting held on September 5, 2012.

The current Martin County School District Impact Fee schedule has been in place since 2007. State regulations require that local governments review and update their impact fee schedules to stay current with changing cost and fiscal conditions. The School District has coordinated the update of the school impact fees with Martin County's impact fee update. The administrative costs of the program are specified in an Interlocal Agreement with Martin County that is currently 3% of the school impact fee collections.

The attached Technical Report outlines the data and methodology used to update the impact fee schedule. After School Board review and approval, the School Impact Fee Technical Report is transmitted to the Martin County Board of Commissioners for final action.

3. **FINANCIAL IMPACT:**

Is there a financial impact (Finance Review Required)? YES NO

Is funding provided in approved budget? YES NO

What additional funding is required? Indicate Amount \$ _____

Source: _____

4. **REQUIRED SIGNATURES:** By signing below, you are verifying that you have reviewed the item and it is ready for submittal to the Superintendent and School Board respectively.

Requestor: Boyd Lawrence
Type or Print Name

Boyd Lawrence
Signature

Director/Principal: Julian G. (Jay) Angel
Type or Print Name

Julian G. Angel
Signature

Exec. Director or Asst. Superintendent: Steve Weil
Type or Print Name

Steve Weil
Signature

Finance Review: Bryan Thabit
Type or Print Name

Nelene Duran Tolomeo for Bryan Thabit
Signature

Legal Review: REQUIRED
 NOT REQUIRED

Signature

5. **SUPERINTENDENT RECOMMENDS APPROVAL:** YES NO

**THE SCHOOL BOARD OF MARTIN COUNTY, FLORIDA
FACILITIES DEPARTMENT**

1050 SE 10th Street, Stuart, Florida 34996 • Telephone (772) 223-3105 • Facsimile (772) 221-4912



SCHOOL BOARD MEMORANDUM

To: Jay Angel, Director of Facilities

From: Boyd Lawrence, Planning Specialist

Date: September 7, 2012

Topic: Recap of the Martin County Impact Fee Committee meeting held on September 5, 2012.

The Impact Fee Committee met to review and make a recommendation to the Board on the DRAFT Martin County School District Impact Fee Study – Technical Report (dated August 30, 2012). After about one hour of review and discussion with the consultant, Walter Keller, the Committee voted 7 to 1 (Mr. Towne opposed) to recommend the approval of the methodology used in the Technical Report.

Throughout the committee discussion, there were concerns expressed about the increase in the fees proposed in the Technical Report given the current conditions in the new housing market. The Builders Association representative was most outspoken and a few other committee members provided comments as well. In follow-up to that discussion, the Committee voted 6 to 2 (Mr. Hendrickson and Mr. Lawrence opposed) to recommend that the Board "freeze" (maintain) the existing 2007 school impact fees until the next review period due to current economic conditions.

Also present from the School District to address committee questions was Ms. Debbie Jenkins from the Finance Department. Mr. Fred van Vonno (School Board Counsel) was in attendance at the meeting.

Table 14 – Proposed School Impact Fee

Residential Unit Size	Unit	Students	Proposed School Impact Fee	Existing School Impact Fee
800 FT ² & Under	Dwelling	0.148	\$3,868.00	\$3,609.37
801 to 1,100	Dwelling	0.219	\$5,739.00	\$5,355.08
1,101 to 2,300	Dwelling	0.228	\$5,966.00	\$5,567.39
2,301 & Over	Dwelling	0.236	\$6,169.00	\$5,756.12

Source: Walter H. Keller, Inc.

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Martin County School Board
Impact Fee Update Workshop
September 2012

Study Overview

- Prior School Impact Fee Study in 2007
- Study Performed in-conjunction with County Update
- Legal Basis for Fee - Nancy Stroud, AICP, JD
- Impact Fee Methodology Similar to 2007 Study
- Study Documented in Technical Report





Martin County School Board
Impact Fee Update Workshop
September 2012

Legal Basis For Florida Impact Fees

- Dual Rational Nexus Test (1976)
- *Home Builders & Contractors of PBC vs BOCC*
- Florida Statutes
 - Section 163.3202 – Land Development Regulations
 - Section 380.06 – DRI Impacts
 - Section 163.31801 – FL Impact Fee Act (2006)
 - 2011 Revisions to FL Impact Fee Act





Martin County School Board
Impact Fee Update Workshop
September 2012

Socio – Economic & Enrollment Data Analysis

- 2010 Census for Population & Housing Characteristics
- Study Base Year 2012
- Population Forecasts by UF BEBR & Martin County
- Existing School Enrollment per October 2011
- Public School Enrollment Forecast by Public Pathways





Martin County School Board
Impact Fee Update Workshop
September 2012

Student Station Cost & Financial Analysis -*

- Facilities Inventory per July 2012 FISH LOS Report
- New Student Station Cost Developed From:
 - 10 Year Capacity Improvements
 - Current Station Land Costs & Central Facility Costs
- Analysis of 5 Yr Capital Budget Revenues & Expenditures
- Analysis of New Unit & Vacant Land Millage Credits
- Determination of Net Funding Deficit Per New Student

* - *Relative to Impact Fee Study*





**Martin County School Board
Impact Fee Update Workshop
September 2012**

Table 7 - Total Cost per Student Station-*

School/Facility	Cost	Capacity	Cost Per Station
School			
High School, 300 Student Exp	\$9,900,000	290	\$34,138
SFHS New Classroom Bldg	\$4,950,000	145	\$34,138
New Elementary School	\$30,000,000	750	\$40,000
Weighted Average			\$37,848.10
Land			
Land Area per Station - Acres			0.0310
Land Cost per Acre			\$42,351
Land Cost per Station			\$1,311.66
Proportionate Land Cost Per Station			\$830.17
Central Facilities			
Vehicle Fleet			111
Number of Buses			\$107,000
Cost per Bus			\$11,877,000
Value of Buses			\$1,999,192
Environmental Studies Center			\$120,000
IALC Teen Parent Center			\$3,758,708
Stuart Learning Center			\$7,412,867
Martin Superintendents Office			\$231,487
Migrant Program			\$13,488,225
Transportation - Service Center			
Land			
Acres			37.64
Value per Acre			\$161,180
Land Value			\$6,066,815
Value of Central Facilities			\$44,954,294
Central Facility Value Per Station			\$2,056.56
Total Cost Per Station Proposed			\$40,734.82
Total Cost Per Station Existing			\$41,216.32

* - Relative to Impact Fee Study





**Martin County School Board
Impact Fee Update Workshop
September 2012**

Table 9 – Revenue Sources & Funding Expenditures-*

Capital Revenues	FY2011-12	FY1012-13	FY2013-14	FY2014-15	FY2015-16	5 Yr Total
State of Florida:						
Peco - Maintenance	\$0	\$0	\$0	\$0	\$0	\$0
Peco - New Construction	\$0	\$0	\$0	\$0	\$0	\$0
CO&DS (including interest)	\$526,382	\$532,621	\$532,621	\$532,621	\$532,621	\$2,656,866
COBI Bonds	\$0	\$0	\$0	\$0	\$0	\$0
Total State	\$526,382	\$532,621	\$532,621	\$532,621	\$532,621	\$2,656,866
Net State	\$526,382	\$532,621	\$532,621	\$532,621	\$532,621	\$2,656,866
Enrollment	17,501	17,530	17,561	17,590	17,621	\$2,656,866
State Funds per Student	\$30.08	\$30.38	\$30.33	\$30.28	\$30.23	\$30.23
Local:						
Local Millage (1.5 mills @ 96%)	\$26,156,541	\$25,832,803	\$26,220,295	\$27,006,904	\$27,817,111	\$133,033,653
Interest	\$515,000	\$150,000	\$172,500	\$198,375	\$228,131	\$1,264,006
Fuel Tax Rebate	\$28,000	\$28,000	\$28,000	\$28,000	\$28,000	\$140,000
Impact Fees (to be determined)						
Miscellaneous (FPL Rebate)	\$172,144	\$0	\$0	\$0	\$0	\$172,144
COPS	\$0	\$0	\$0	\$0	\$0	\$0
Total Capital Funds w/o Unfunded Balance	\$27,398,067	\$26,543,424	\$26,953,416	\$27,765,900	\$28,605,863	\$137,266,669
Growth Projects						
New Elementary School						
High School 300 Student Expansion						
SFHS New Clrm & Infstr Upgrades						
Total Growth Projects	\$4,950,000	\$4,950,000	\$4,950,000	\$4,950,000	\$4,950,000	\$4,950,000
Prop Dmg, ESE Equip & Cust Equip	\$275,000	\$275,000	\$275,000	\$275,000	\$275,000	\$1,375,000
School Bus Purchases	\$500,000	\$1,000,000	\$500,000	\$200,000	\$500,000	\$2,700,000
Other Vehicle Purchases	\$100,000	\$50,000	\$100,000	\$50,000	\$100,000	\$400,000
Capital Outlay Equipment	\$993,220	\$820,864	\$900,000	\$900,000	\$900,000	\$4,514,084
Rent/Lease Payments	\$300,000	\$340,000	\$300,000	\$300,000	\$300,000	\$1,540,000
Rent/Lease Portables	\$100,000	\$50,000	\$50,000	\$50,000	\$50,000	\$300,000
C/W Technology Projects	\$4,500,000	\$4,500,000	\$5,000,000	\$5,000,000	\$5,000,000	\$24,000,000
Major Construction Projects	\$10,000,000	\$1,000,000	\$7,500,000	\$6,000,000	\$6,000,000	\$30,500,000
Maintenance, Renovation and Repair	\$6,303,000	\$5,700,000	\$5,450,000	\$5,450,000	\$6,475,000	\$29,378,000
Other Capital Projects	\$9,444,980	\$10,110,507	\$10,193,982	\$10,195,015	\$10,195,015	\$50,139,499
Total Capital Costs	\$32,516,200	\$28,796,371	\$30,268,982	\$28,420,015	\$29,795,015	\$149,796,583
Total Capital Expansions	\$0	\$4,950,000	\$0	\$0	\$0	\$4,950,000
Total Capital Projects	\$6,368,220	\$6,645,864	\$6,775,000	\$6,425,000	\$6,775,000	\$32,989,084
% Exp & Capital Projects to Capital Funds	23.2%	43.7%	25.1%	23.1%	23.7%	27.6%

* - Relative to Impact Fee Study



Walter H. Keller, Inc.
Consulting Engineers and Planners
Coral Springs • Sewall's Point



Martin County School Board
 Impact Fee Update Workshop
 September 2012

Table 13 – Net Deficit Per New Student-*

Cost or Funding Item	Amount
Equity Cost Per New Student Station (Table 8)	\$40,922
Average Students Per New Residential Unit (Table 5)	0.2210
Average Funding Required Per New Residential Unit	\$9,044
Average Cost Per New Student	\$40,922
State (CO&DS) (Table 9)	1.94%
Local (Capital Millage) (Table 9)	27.60%
PV New Unit Millage Credit (Table 11)	4.89%
Past Payment Credit (Table 12)	1.57%
Total	36.00%
Anticipated Average Net Funding Deficit Per New Student	(\$14,731)
	\$26,192

* - Relative to Impact Fee Study





Martin County School Board
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Impact Fee Study Findings - *

- 2012 Student Generation Rate 0.222 per Unit
- 650 ± New Students in 10 Years
- New Student Station Cost Approx. \$40,700
- Capital Funding Primarily Provided by Capital Millage
- Approx. 27.6% of Capital Millage Funds to Capital Projects
- Capital Cost Deficit Per New Student Approx. \$26, 192
- Technical Report Documents Analysis & Fee Calculations

* - *Relative to Impact Fee Study*





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