



LAKE COUNTY
FLORIDA

PUBLIC SCHOOL FACILITIES SUB-ELEMENT
Data, Inventory & Analysis
2030 Planning Horizon

A. Introduction

1. Overview

In September 2005, Lake County was selected as a pilot community for the state's new school concurrency initiative. The School Concurrency requirement for all counties, municipalities, and school boards across the state of Florida, is a result of the approval of Senate Bill 360. The bill overhauls the state's growth management laws. Commonly referred to as the "pay-as-you-grow plan", the bill dedicates new funding and stipulates policies that, when implemented, will help to ensure that the school needs of communities are met.

In recent years Lake County has experienced unprecedented growth, and there is no sign of its abatement. Three devastating citrus freezes in the 1980s precipitated the drastic change in Lake County's appearance. The metamorphosis from a primarily agricultural and rural area to one in which there is a high demand for residential development that resulted in the suburbanization of large portions of Lake County has had a significant impact on the school system.

The exponential increase in population produced both positive opportunities and serious challenges that Lake County must address, such as an increase in traffic, a greater demand for public facilities, and a burgeoning student enrollment population. An understanding of Lake County's population and demographic composition, future projections, and an analysis of needed capital improvements and incoming revenue play an essential role in planning for and sustaining an efficient, successful public school system that can appropriately handle the influx of students.

The Public School Facilities Element is the guiding document that will enable the Lake County School System to implement a financially feasible plan to provide sufficient capacity for public school facilities. It does not—and does not need to—broach curriculum requirements, administration of facilities, or the myriad duties with which the Lake County School Board is tasked.

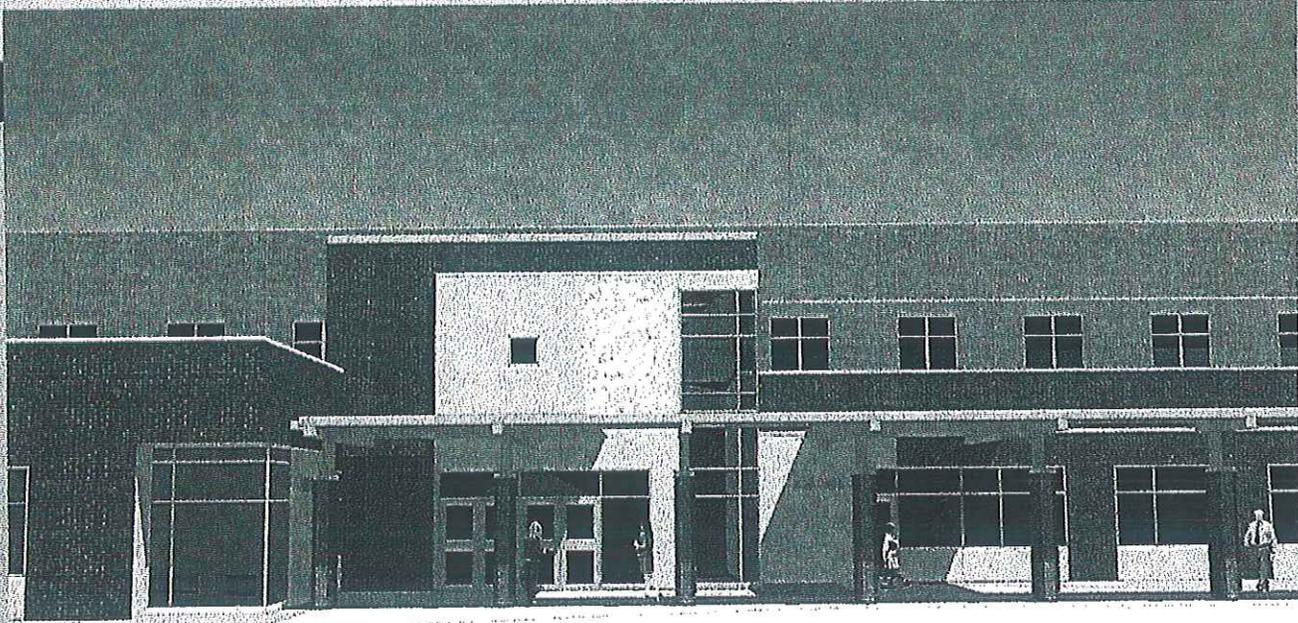
To address the overwhelming needs of the Lake County School System, the Lake County Planning Department has produced this document in conjunction with the Lake County School District and Lake County's fourteen municipalities. Land use planning issues are prevalent in the school siting process and in existing school facility expansion, such as compatibility with supporting infrastructure. Continued intergovernmental coordination between local governments and the School Board will ensure that all pertinent issues are resolved.

2. Element Requirements

The Public School Facilities Element and related comprehensive plan amendments to establish public school concurrency are based upon the following data and analysis, pursuant to requirements of Rule 9J-5.005 (2), F.A.C. and Rule 9J-5.025 (2), F.A.C. The primary source of data was provided by the Lake County School District in its adopted Fiscal Year 2010-2014 Capital Improvement Program-Five Year Facilities Master Plan. The Public School Facilities Element is intended to ensure coordination among the County,

Municipalities, and the School Board so that school capacity at the adopted level of service standard is available at the time of the impacts of development.

Attached is the Lake County Public Schools 5-Year Work Plan, which has been developed in accordance with the requirements of Florida Department of Education Guidelines. The Work Plan integrates the facilities planning program with the annual capital budgeting and the District's educational programming strategies. It was used as the Data, Inventory and Analysis for the Public School Facilities Sub Element. Also attached are the Capital Budget for 2009-10 District Facilities Work Program FY 2010-2014, which was approved at the September 14, 2009 School Board Meeting, and the Lake County School Location Maps.

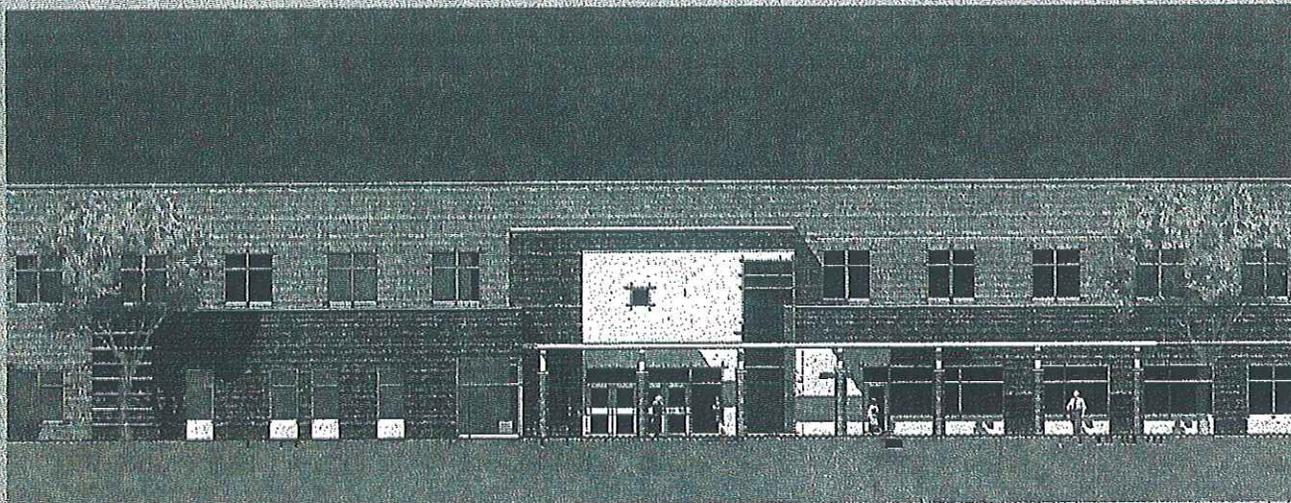


Lake County Schools Five Year Facilities Master Plan

FY 2010-2014

CAPITAL IMPROVEMENT PROGRAM





"The mission of the Lake County Schools, a resilient and growing system working hand in hand with the community, is to prepare individuals for successful lifelong learning, productive employment and responsible citizenry by providing a safe, resource filled learning environment."

Superintendent
Susan Moxley, Ed.D.

Board Members
Larry Metz, District 1
Rosanne Brandeburg, District 2
Cindy Barrow, District 3, Chair
Debbie Stivender, District 4, Vice Chair
Kyleen Fischer, District 5

The Lake County School District affirms adherence to equal access/equal opportunity in accordance with the provisions of the Florida Educational Equity Act and all other relevant state and federal laws, rules, and regulations. Discrimination on the basis of race, national origin, sex, age, veteran status, disability, or marital status against a student or employee is strictly prohibited. The Equal Opportunity supervisor responsible for compliance is Becky Nelsen, and she may be contacted at (352) 253-6500.

OVERVIEW OF THE WORK PLAN

The Lake County Public Schools 5-Year Work Plan has been developed in accordance with the requirements of Florida Department of Education Guidelines. The Work Plan integrates the facilities planning program with the annual capital budgeting and the District's educational programming strategies. The document contains seven chapters as follows:

Chapter 1 summarizes the economic and demographic trends that affect educational facilities planning for Lake County Public Schools (LCPS). This chapter also highlights the fiscal considerations that are relevant to the development of the Work Plan.

Chapter 2 describes the facilities planning components as they relate to the 5-Year Work Plan. Outlined in this chapter is the enrollment forecasting methodology, formulas for calculating capacities, and educational considerations.

Chapter 3 includes the enrollment forecast that provided the basis for the adopted Work Plan. The five year enrollment forecast will be updated this winter for the spring draft Work Plan. This chapter also includes the 10-20 year forecast.

Chapter 4 summarizes this year's adopted Work Plan by major goals. It describes strategies and the recommendations for individual schools. This chapter also serves as an executive summary of the recommendations in the Work Plan.

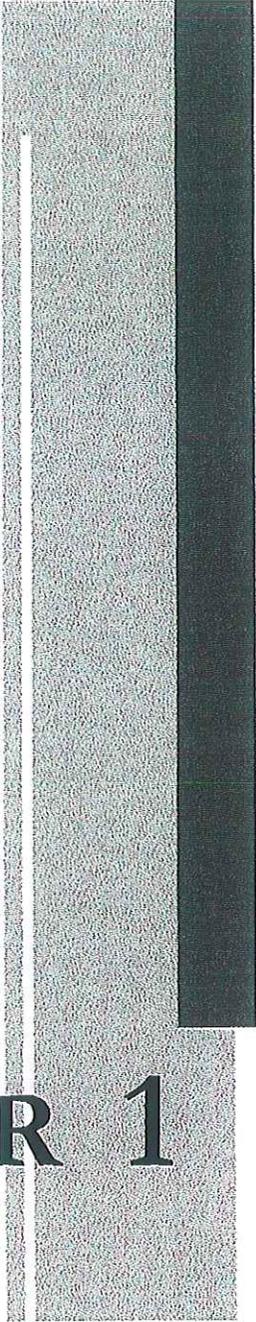
Chapter 5 is organized by Planning Zones and provides enrollment projections, facilities information, and project proposals for individual schools.

Chapter 6 is mandated by the State of Florida to include the ten and twenty year facilities needs through 2029.

Chapter 7 includes excerpts from the Concurrency Interlocal agreement and the projected level of service with the currently adopted Work Plan.

Table of Contents

Overview	I
Summary of the FY 2010-2014 Facilities Work Plan.....	II
Chapter 1 – The Lake County Planning Environment	1-1
Chapter 2 – Facilities Planning Components.....	2-1
Chapter 3 – Enrollment Forecast.....	3-1
Chapter 4 - Work Plan Recommendations.....	4-1
Chapter 5 – School Enrollment and Recommendations by Planning Area.....	5-1
Chapter 6 – Ten and Twenty Year Plan.....	6-1
Chapter 7 – Concurrency (Interlocal Excerpts and Levels of Service).....	7-1



CHAPTER 1

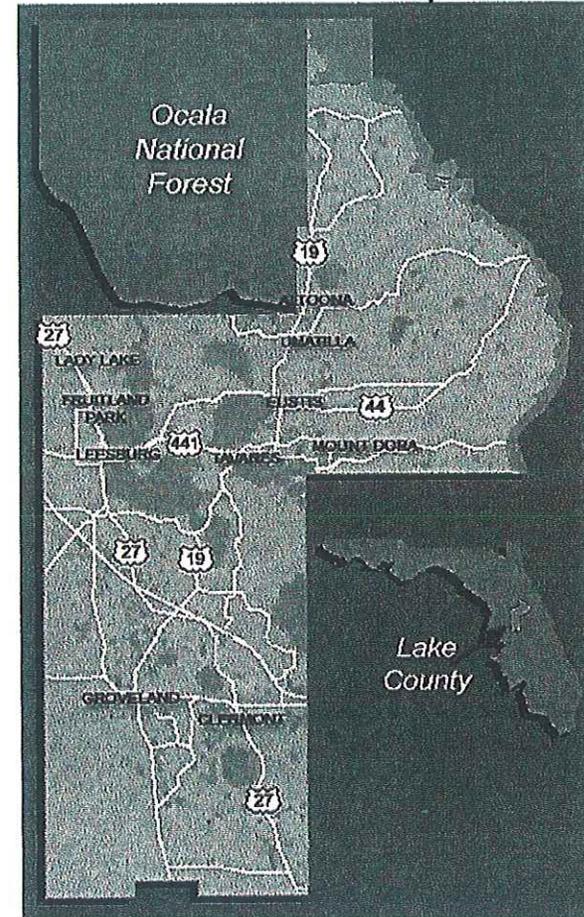
Chapter 1 The Planning Environment

Introduction

Since the mid-1990s, Lake County, its municipalities, and the Lake County School Board have seen many changes in population growth, student demographics, financing structures, and regulations affecting both education and facilities planning. The dramatic population growth between 2000 and 2006, and the resulting rapid escalation in housing prices has been matched by the recession of 2007-2009, a recession which is expected to begin to ease in 2010. Student populations grew rapidly until 2008, and leveled off in the 2008-2009 school year, remaining level in 2009-2010. The initial increases in population put stress on the Lake County School District's facilities and caused overcrowding that the District continues working to relieve. In conjunction with general population growth, the Hispanic population grew to 17% of the school population, from just over 5% in 2000, changing the educational face of the District, as did an increase in students from lower socioeconomic backgrounds.

Through 2006, the revenue from property value increases and impact fees from new housing assisted the District in keeping up with the growth in population, and the District was able to open eleven new schools since 1999. However, in the midst of a local and national recession, and with the property tax structure changes approved by Florida voters in 2008, the District's revenue projections have decreased significantly, making it difficult to maintain the level of construction needed to relieve continued overcrowding at some District schools and also to replace aging facilities as they become sub-standard. The FY2010-14 Facilities Work Plan includes construction of one new high school, a 9th grade center at a second high school, renovations adding capacity at three middle schools and three elementary schools, one new elementary school, and many additions at existing schools during the next five years to address some of the existing and future space needs. Because of the lower growth projections and severe capital constraints to be

Map 1-1



discussed later in this chapter, the projected need for new schools has changed significantly from the 2008-2012 plan, which called for two new high schools, two middle schools and eight elementary schools.

In this atmosphere of change and uncertainty, the District still holds firm to its commitment to provide the facilities required to maintain the level of service required by both the class size reduction and school concurrency legislation passed by Florida voters and the Florida Legislature, respectively.

Demographic Context

Population Growth

In 1887, Lake County was carved out of what are now Orange and Sumter Counties. Over the next 100 years and through the 1980s, Lake County was one of the largest producers of citrus in the state. Even today, the County is comprised of predominantly small towns separated by a few remaining groves and rolling hills. Beginning in the mid-1990s, the intense housing boom in Orange County began to spread westward into parts of Lake County along Route 50 and the Florida Turnpike. From 2000 to 2006, housing grew dramatically, and thousands of additional units were approved by the County and local governments. Although the general national housing downturn has affected the County, and fewer units were built from 2007 through 2009, a trend which

is expected to continue through 2010, in the long-term, better highway access, good schools, and a high quality of life will continue to create pressure for new housing and increasing school capacity.

Between 2000 and 2009, Lake County Schools experienced a 34% increase in student enrollment, from 26,600 to just over 40,000 students. The recession, decreased population mobility, and near-standstill in the housing market have made predicting growth rates more difficult, and Lake County has revised its growth projections downward for the next several years. However, growth is expected to begin increasing again once the market has stabilized.

In 2007, in accordance with the Interlocal Agreement on School Concurrency, the County and the municipalities began coordinating population projections. The municipalities provided their projections to the County staff, who then reconcile them into a cohesive projection. This process accounts for many of the annexations of both vacant land and planned subdivisions that have taken place recently, including such major annexations as the Hills of Minneola Development of Regional Impact with over 4,000 housing units. As a result, projections of growth from the municipalities have risen dramatically from previous projections while the population predicted for the unincorporated areas of the county has decreased.

Population Trends and Projections

Lake County 2030 Population Projections by Municipality (based on BEBR Low-Medium projections)

Table 1-1

City	1990	2000	2005	5-year Growth Rate	2010	2015	2020	2025	2030	% Increase 2000-2030
Astatula	981	1,298	1,461	13%	1,622	2,269	2,524	2,780	3,074	137%
Clermont	6,910	9,338	20,017	114%	27,965	36,441	44,480	51,794	58,799	529%
Eustis	12,856	15,106	17,249	14%	18,760	19,820	20,880	21,715	22,597	50%
Fruitland Park	2,715	3,186	3,463	9%	5,776	7,827	9,878	11,929	14,620	359%
Groveland	2,300	2,394	4,550	93%	8,898	12,660	18,015	25,633	38,468	1507%
Howey-in-the-Hills	724	956	1,107	16%	1,394	1,518	1,655	1,803	1,970	106%
Lady Lake	8,071	11,828	12,709	7%	15,246	16,051	16,899	17,791	18,750	59%
Leesburg	14,783	15,956	17,467	9%	21,675	29,525	38,252	46,752	55,979	250%
Mascotte	1,761	2,687	4,001	50%	6,221	7,701	9,535	11,804	14,893	454%
Minneola	1,515	5,435	8,867	63%	11,184	24,292	32,818	37,896	44,134	712%
Mt. Dora	7,316	9,418	10,899	16%	11,377	12,872	14,564	16,478	18,643	98%
Montverde	890	882	1,157	31%	1,355	1,463	1,579	1,705	1,845	109%
Tavares	7,383	9,700	11,340	17%	13,840	16,939	20,487	24,925	30,813	218%
Umatilla	2,350	2,214	2,509	13%	3,174	3,552	3,992	4,509	5,559	151%
Unincorporated	81,549	120,129	146,221	23%	149,363	139,120	126,042	110,386	79,906	-34%
Total	152,104	210,527	263,017	25%	297,850	332,050	361,600	387,900	410,050	95%

Source: Lake County Growth Management, November 12, 2009

Demographically, Lake County's population is older than other Central Florida Counties. In 2006, approximately 19% (22% Florida average) of the population was under age 18. In contrast 27% (17% Florida average) of the population is over age 65. Some city leaders have expressed concern about continued growth in 'age restricted' housing. Future growth may change the age patterns throughout the County.

The Lake County Growth Management staff projections assume that new housing will attract a balanced population similar to that in 2000 for at least the next 5-10 years.

Housing Patterns

New housing starts in the past decade have been predominantly single family detached housing, although in recent years, several of the urban core areas have encouraged multi-family and townhouse developments.

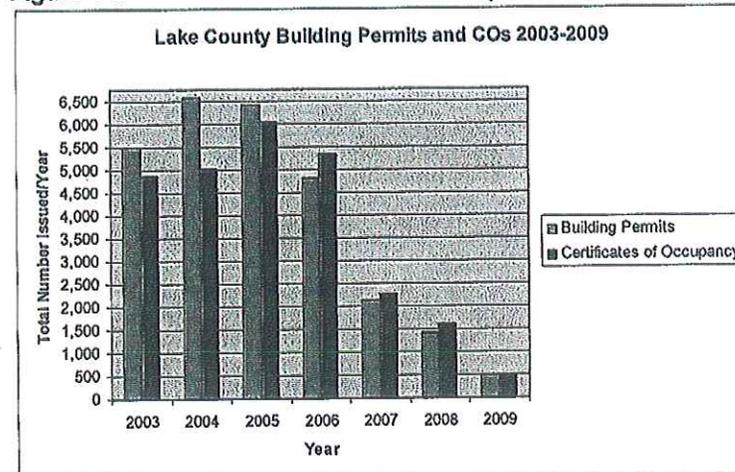
Since the mid 1990s, the major points of population growth in Lake County have been along the State Road 50 corridor in Clermont, Groveland, Minneola and Mascotte. This area serves the housing markets for both commuters to Orlando and workers at the theme parks and resorts in southern Orange County.

The rest of the County, including the historic population centers known as the "Golden Triangle" (Tavares, Eustis and Mount Dora), has seen moderate growth but is expected to see more, as the Wekiva Parkway and the Apopka Bypass toll roads are constructed.

Since 2006, the total number of residential building permits issued by local governments has decreased significantly. According to building permit data provided to the District by Lake County and its municipalities, the local governments

issued 5,482 permits countywide in 2003, 6,415 permits in 2004, and 7,534 permits in 2005. In 2006, permit numbers began to decrease with local governments reporting the issuance of 4,880 permits, and in 2008 permit numbers reached a low of 1,409 permits. Continuing the recent trend of decreasing permit numbers, as of July 2009 local governments reported 511 total residential building permits. Compared to recent calendar year data, 2009 may yield the lowest number of residential building permits in six years.

Figure 1-2 Source: Lake County and municipalities



*2009 permit information is for period from January - July, 2009

With local and national home purchases decreasing nationwide, as well as the decrease in new home construction, 2009 is projected to surpass 2008 and generate the lowest number of building permits in recent years. Although late 2009 has seen some minor improvements in the market, real estate analysts and economists indicate that the residential construction industry nationwide/statewide may not

significantly improve until 2010 or 2011. With 64 active projects reported in Lake County (source Charles Wayne Consulting, Inc., Residential Market Reports, 2009:Q3) and the District tracking more than 25,000 approved residential units (located in developments with 40 or more dwelling units), the District must continue to closely monitor future building permit information and residential construction data to ensure that capacity will be available to accommodate the future student population.

Based on an analysis performed for the 2004 Impact Fee Study and confirmed by later studies, the student multiplier for housing in Lake County is .41 (elementary 0.19, middle 0.11, and high 0.11). This multiplier is the number of public school students that are 'on average' living in each home. Therefore, the multiplier assumes one elementary school student for every five homes. Long range enrollment projections are developed factoring in the student multiplier and projected housing units.

Demographic Characteristics

Like most school districts in Central and South Florida, Lake County serves a diverse population – more diverse than the County as a whole. Table 1-3 shows a comparison by race and ethnicity of the District's enrollment to the general population. As the County has grown in the last seven years, the schools have seen an increase in the Hispanic population and the tendency to declare multi-racial heritage. That trend is expected to continue.

With the growth in the Hispanic population, Lake has also seen a greater demand for language based services such as English Language Learners (ELL) supports.

Race and Ethnicity (Lake County and Public Schools)
Table 1-3

	County 2000	School Enrollment 1998	School Enrollment 2009
White (Non-Hispanic)	84.2 %	73%	60%
African American	8.3 %	16%	16%
Hispanic	5.6 %	7%	18%
Asian	0.8 %	0.9%	3%
Other	3.4 %	0.5%	3%

Sources: US Census and LCPS

Twenty-two Lake County schools receive Title 1 funding. Because there is a correlation between poverty and student success, the federal government supplements funding for schools with a large percent of students that qualify for Free and Reduced Meals (FARMS). This indicator is typically tracked at the elementary/middle school level. Approximately 51% of the District's students receive Free and Reduced Meals. This percentage may decline in the future as the economy improves and as new housing dilutes the numbers by increasing the total eligible participants.

Participation in English Language Learners (ELL) and Free and Reduced Meals Programs (FARMS)

Table 1-4

	# of Students 2000	% of Total 2000	# of Students Oct., 2009	% of Total 2009
Received ELL Services	619	2%	1,821	4%
Qualified for FARMS at the elementary level	11,373	39%	20,454	51%

It is difficult to forecast changes in demographic characteristics because indicators are often based on short term economic trends and occasionally political strife outside of the United States. However, using the current trends in housing, growth in the service industry in the Orlando area, and aging of the nation's population in general it is likely that the student population in Lake County may become more like its neighbor, Orange County, over the next ten years – more Hispanic and more affluent.

Economic Context

For 25 years, Florida's economy has grown at an average annual rate of more than 4%. During this time the State has developed into an international economic hub, with a gross state product of over \$400 billion, exceeded only by 15 other world economies and four other economies in the Americas. With one of the busiest airports in the world, Orlando is a key driver of Central Florida growth. Although the Orlando (and surrounding area) economy has traditionally been based on agriculture, tourism, and high tech industries, the regional

economic base now supports industrial and commercial trade, both international and domestic.

Since losing much of the citrus industry in the 1980s, Lake County has become predominantly a residential community attracting people from the rapidly growing Orange County/Orlando area who are looking for more value in housing, small city living, and a high quality of life.

The Florida Turnpike connecting Orlando to Northwest and South Florida provides direct access through the center of the county. A new interchange in South Leesburg and another under consideration in Minneola have the potential to spur both commercial development and housing starts.

A recent downturn in the national housing market has had a dramatic impact on enrollment in the State of Florida from 2005 to 2009. Moderate housing costs in Lake County have provided some insulation to the school district; however, in late 2006 and 2007, as the housing slump worsened, Lake County's population growth began to slow down and level off, as well, and long term projections have been modified to reflect a 'market correction' and slower growth trends.

Fiscal Context

Like many Florida School Districts, Lake County is facing severe operating and capital budget cuts in 2009. The combination of a slow economic and housing market and state-wide property tax reform has prompted the school district to revise downward its revenue forecasts for the next five years.

In the past, LCPS has used a variety of funding mechanisms to construct and maintain its infrastructure including a full 2.0 Mill for District Capital Improvement Tax, Certificates of

Participation (COPs), a local discretionary sales tax (1/3 penny) and school impact fees. These local sources when combined with state funding have brought in up to \$100 million annually for capital projects.

These funding sources have undergone several changes.

- A slower housing market reduces the money available through impact fees
- Housing values are declining and the housing inventory growing at a slower rate reducing money available through property taxes
- A slow economy reduces funding (mostly state) available through the sale tax

The last point is considered the cause for the state's mandate that school districts transfer .5 of the 2.0 Mill for District Capital Improvements to the operating budget. The impact of this requirement is to reduce both the annual revenues and the capacity of the district to borrow through COPs.

Over the past few years property tax reform has become a highly politicized issue in Florida. In 2007, the Legislature mandated a roll-back of municipal tax assessments that has had a mild effect on many jurisdictions. In 2008, homeowners voted to change the homestead criteria affecting the District's ad valorem revenues. A 2008 referendum that would have allowed the state to shift most of the funding for public schools to a state-wide sales tax and another 'to be determined' revenue source has been stopped in the courts. All of these changes create uncertainty for future capital funding.

Lake County Public Schools is spending all of its funding annually to maintain the adopted level of service.

Legislative Context - Concurrency

In 2005, the State Legislature passed Senate Bill 360, a Growth Management Reform Act that has significant impact on School District, County, and municipal planning throughout the state. This Act extended the requirements for 'concurrency' to include schools. Key features of the bill are as follows:

- School concurrency is now mandatory statewide.
- School boards and local governments within each county must have created school concurrency management systems by December 1, 2008 or else face substantial penalties.
- Developers must be given the option to pay for school improvements in order to avoid a school concurrency requirement. The amount of payment must be proportional to the number of students who will come from the new development. This option is called proportionate share mitigation.

School concurrency is a management system which has been created in an effort to ensure the provision of facilities concurrent with development. In 2005, Lake County was selected by the Departments of Community Affairs and Education to be a "Pilot Community" for the purposes of drafting the documents necessary for the implementation of a school concurrency program complying with SB 360, with the following specific features:

Interlocal Agreement – A school concurrency management system cannot be created by a single local government body acting alone. It requires the joint action of the school board, the county commission, and the city commissions within a county.

In 2007, the County, the School Board and all the municipalities approved a new Interlocal Agreement on School Concurrency. Key provisions of the Interlocal agreement are agreements on:

- Requirements for staff and appointed committees to meet regularly;
- Methodologies for projecting population and student generations;
- Regular reporting of growth and development trends;
- Colocation and shared use of facilities;
- City and County review of the School Board's Work Plan;
- Cooperation on the Public Schools Facilities Element, and zoning classifications and Future Land Uses in which schools shall be allowed;
- Considerations to be made in locating, renovating or closing schools;
- City and County review of site/development plans;
- Level of service standards and concurrency service areas;
- Methodologies for determining school capacity and concurrency; and
- Mitigation alternatives when no capacity is available.

The Interlocal agreement is reviewed every year by an advisory board for recommended changes. In 2008, the interlocal agreement was revised to reflect greater specificity in meeting dates, as recommended by the Florida Department of Community Affairs. A copy is available on file at the County offices, each municipality, and the School Board.

Public School Facilities Element – The specific details contained in the interlocal agreement must become part of each local government's comprehensive plan.

Land Development Regulations – Each local government must approve amendments to their Land Development Regulations which implement the requirements and processes of school concurrency.

Five Year Facilities Work Plans – The school board must create 5-year capital construction plans for new schools and/or improvements to existing schools. These plans must show where and when new school facilities will be built using a financially feasible plan.

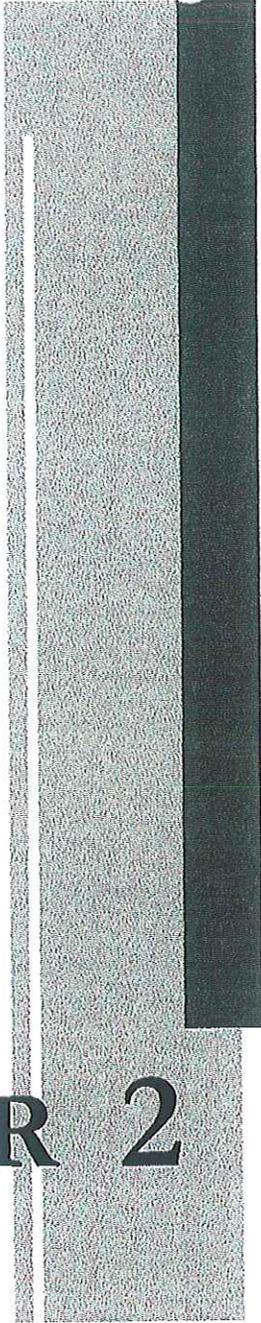
The School Board and County's progress in implementing school concurrency is outlined in greater detail in Chapter 7.

CONCLUSION

Past demographic, economic, and enrollment trends suggest Lake County Public Schools will continue to see a demand for new facilities for at least the next fifteen years. Although, growth has slowed it is not projected to stop.

Funding needs are challenging the District's resources. The District is unable to address a backlog of capacity needs and maintenance issues.

The School Board has expressed grave concerns about the implication for the maintenance and upgrading of older facilities in stable communities. A dedicated funding source will need to be identified in the future to ensure that the District continues to provide equitable facilities throughout the County.



CHAPTER 2

Chapter 2

PLANNING PROCESS AND COMPONENTS

State Requirements

Five Year Work Plan

Many districts in Florida have experienced a large in-migration of new residents and rising student enrollment since the 1960s. This long-term trend, combined with moderate tax revenue, has left the fastest growing districts, including Lake County Schools, with crowded schools and high expectations. In response to this situation, the Florida Legislature passed the Smart Schools initiative in 1998. This legislation provides guidelines for addressing school overcrowding and includes a number of requirements for all Florida districts. One of these requirements is the annual submission of a 5-Year Work Plan.

This annual document must include, at a minimum, the following information:

- A schedule of major repair and renovation projects.
- A schedule of capital outlay projects necessary to ensure the availability of satisfactory student stations.
- The projected cost for each project identified in the 5-Year Work Plan.
- A schedule of capital outlay revenues.
- A list of projects to be funded from current revenues
- A set of options for the generation of additional revenues for the projects identified in the Work Plan.
- Ten and twenty year projected enrollment and capital needs

This Five Year Facilities Plan is an expansion and reformatting of the State requirement. The goal of this Plan is to encourage community support and understanding and ultimately to assure public accountability.

Plant Survey

The Five Year Work Plan is prepared in accordance with the Plant Survey. The Plant Survey recommends all possible projects that a school district should undertake to meet projected enrollment and bring all schools up to current state standards. The survey must be prepared every five years but may be updated as often as needed to be consistent with local plans. These two documents should be coordinated in light of growth planning goals and guidelines.

LCS adopted a revised Plant Survey in 2008. Spot surveys are completed as necessary.

Facilities Planning Calendar

The 5-Year Work Plan is the outgrowth of an annual planning process that allows LCS to be proactive in addressing changes in enrollment and other factors that drive capital improvement needs. This process is also intended to increase public understanding of the District's facilities needs and how they are being resolved. The major components of this process and an annual calendar are as follows:

Deadline	Major Tasks
Year-round	County and city planners provide quarterly reports on current and pending development
Winter	Update five year enrollment forecast
Winter	Update capacities and identify program changes
Spring	Board Workshop – Demographic update and Issues and Option discussion
May	Assess fiscal environment and draft revenue forecast
June	Publish draft Five Year Facilities Plan
July- August	Board Workshop(s) and opportunity for public comment
September	Public Hearing on the Five Year Work Plan; Final action
October- November	Print final Five Year Work Plan; Submit State Work Plan spreadsheet; Perform spot Plant Survey as needed

Enrollment Forecasting

The forecasting of school enrollment requires the analysis of multiple data sources including birthrates, the demographic make-up of neighborhoods, local and regional economic and housing trends, program and boundary changes and an empirical understanding of individual communities.

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

of certainty than the fifth year estimates. Conversely, accuracy diminishes as the geographic area becomes smaller and the forecast is for more distant points in the future, thereby requiring adjustments in the out years of the Capital Improvements Program (CIP).

In accordance with Florida Department of Education guidelines, the School District of Lake County annually prepares or updates enrollment forecasts following a study of local government area and school level trends. A history of each school's grade-by-grade enrollment is compiled and analyzed. This history reveals patterns in the "aging" or progression (less out-migration factors) of students from one grade to the next. These patterns are extrapolated to develop a school's basic forecast. This approach, termed the Cohort-Survivorship Model, is the most widely applied forecasting method for schools.

Enrollment projections for the School District are prepared in the Fall using the actual "first nine weeks" membership information. The Cohort-Survivorship method "ages" students ahead through the grade levels and calculates a ratio based on a five year history. This ratio is then applied to future years.

However, the data yielded by the basic survivorship model is only the foundation for the enrollment projections. The model data must then be compared to projected county population growth associated with new housing starts and County immigration rates. Population projection data is proportionately matched to school attendance zone data to provide an indication of future growth patterns. The most difficult segment of the K-12 population to predict is each year's kindergarten class. In order to project the kindergarten

population for each year of the CIP, statistical profiles of residential birth data are drawn, then matched to anticipated growth patterns and applied to individual schools.

Finally, the District-wide forecast is compared to the Department of Education (DOE) forecast for the School District of Lake County. To the extent feasible, the forecasts are then reconciled. Any remaining differences should be explainable in light of specific Lake County data.

Recognizing the uncertainty that surrounds long-term forecasts and to a lesser extent, near horizon projections, the District needs to annually review the enrollment projections for adjustments. Demographic shifts are expected in high growth counties like Lake. Annual changes in school programs can also generate near-term facility needs. Staff works closely with school principals and local government planners to encourage an on-going exchange of information that fosters proactive planning rather than reactive problem solving.

Through an interlocal agreement, local governments and the School District have established a process by which they agree and base their planning on consistent population projections. The School District and local governments share information related to existing and planned public school facilities based on projected student growth. This intergovernmental coordinated planning effort requires the local governments to provide the School District with their overall population projections and proposals for residential development. The local governments are also required to provide the infrastructure required for public school facilities. Intergovernmental coordinated planning establishes a planning process based on enrollment projections, which encourages the location of public schools proximate to residential areas

and the co-location of schools with other public facilities to the extent possible.

Capacity Analysis

School capacity (how many students the school's physical facilities can serve effectively) has implications for multiple aspects of district operations:

- Planning new schools
- Renovating existing schools
- Setting attendance zones
- Allocating portable classrooms
- Assigning special programs such as exceptional student education classes and magnet programs.

Making sound, prudent decisions regarding these matters requires valid, accurate school capacity data.

The Lake County School District uses three different measures of capacity 1) the Florida Inventory of School Houses (FISH) based on Florida Department of Education (FDOE) formulas, 2) Core Capacity based on a pro-rated analysis, and 3) Temporary Capacity reflecting relocatable buildings.

FISH Capacity Defined

FISH (School) Capacity is "the number of students that may be housed in a facility (school) at any given time based on a utilization percentage of the number of existing satisfactory student stations", based on FDOE formulas. It is a product of the number of classrooms at a school and the student stations assigned to each room type. The capacity of some spaces is modified for actual square footage of the teaching space.

Teaching stations are defined as being 600 square feet or more with a teacher and students regularly assigned to the space. No capacity is assigned to small instructional spaces and specialized labs including art, music, resource, etc.

Core Capacity Defined

Core capacity is defined as the number of students that can be served by the dining area in a reasonable number of lunch shifts (3). It is not how many students will fit safely into those spaces at one time; such as the capacity limit posted near the door of each dining room and media center.—Core capacity is calculated by dividing the square footage of the school's dining room by a determined factor. The Concurrency Interlocal Agreement uses both of the above capacities to determine the basis for the level of service.

Temporary Capacity Defined

Any buildings that are portable or modular are defined by the State of Florida as 'non-permanent' capacity. Temporary capacity can be used to meet the requirements of Concurrency only if core capacity is adequate. This option is available because recent reductions to class size have left the District with some schools with a larger core capacity than FISH capacity.

Level of Service

Level of Service (LOS) is not a definition of capacity. It is the target utilization of schools and is the factor of enrollment divided by capacity. LOS is defined in the Interlocal as 100% of FISH capacity unless the Core Capacity exceeds FISH. Under this circumstance LOS may be 100% of Core capacity

not to exceed 125% of FISH. "Concurrency Capacity" for every school can be found in Chapter 7.

Other Program Considerations

Currently, more than 7,000 K-12 students participate in special, alternative and supplemental education programs offered by the School District of Lake County. These programs vary from centers for the highly gifted to programs for school aged parents. All of these programs operate at the discretion of the School Board. The number of students served, where they are housed, and integration with the regular programs are all choices driven by district policies and budgets. Planning for these programs is an essential element to long range planning for school buildings. Special programs affect school capacities, enrollment and building designs.

RENOVATIONS/ADDITIONS

Schools being built in Lake County today are expected to provide an appropriate learning environment for children through the year 2050. During that building life cycle, they must be able to be expanded, contracted and adapted to a changing set of needs.

The adopted Plant Survey identified educational plant updates for nearly every Lake County Public School. Additions included new classrooms, resources rooms, and expanded media and dining areas. Many of these schools were built in the last 15 years. These projects have been prioritized based on the following criteria:

- o Future enrollment relief by a new school
- o Age of facility
- o Over-utilization/number of relocatables

Parallel to these 'upgrade' projects, the District manages a comprehensive maintenance program that addresses the needs of the physical plant including replacing roofs, HVAC equipment, and carpet.

For newer schools this approach to upgrades and renovations ensures that buildings are able to meet the educational needs of the programs and remain safe and comfortable throughout their useful life. However, approximately two-thirds of the District's schools were built more than 20 years ago. Typically, school buildings have a useful life of 35-40 years before they require a more comprehensive renovation/modernization. To address these older buildings, many school districts have a 'modernization' plan that evaluates older schools and systematically schedules schools for comprehensive projects.

Modernization is defined herein as "*a comprehensive upgrading of an existing school to 'like new' school standards*". It is the replacement or rehabilitation of all major physical systems (HVAC, windows, lighting, work surfaces, etc.). It is also the expansion and remodeling of spaces to comply with current facilities standards. A modernization addresses the school building as an integrated system and considers such issues as delivery of the instructional program, student circulation, and the relationships of core facilities, security concerns, and site access. A modernized school is expected to begin its life cycle again as though it were a new building.

As new schools are built in growing communities to address space needs, funds must be dedicated to revitalize and preserve existing schools in older communities. Quality schools are key elements in the viability of older neighborhoods. These schools and their communities should

not wait until all the space needs are addressed throughout the county.

In 2009-10, the School Board authorized a Facilities Condition Assessment of all school campuses. This assessment will look at the physical condition, technology, and educational adequacy of all the school buildings throughout the District. The results will be used to assist in the prioritization of capital projects.

MAJOR MAINTENANCE PROGRAM

Buildings and their major components have a limited life cycle that begins with the opening of a new school and culminates in a modernization or replacement. As building components reach the end of their useful life, they become operationally unreliable, often energy inefficient and require excessive maintenance time and money.

The LCPS provides for the maintenance of school buildings through the support of the operating and capital budgets. District-wide projects ensure the routine maintenance, repair, and replacement of building components such as roofs, HVAC systems, etc.

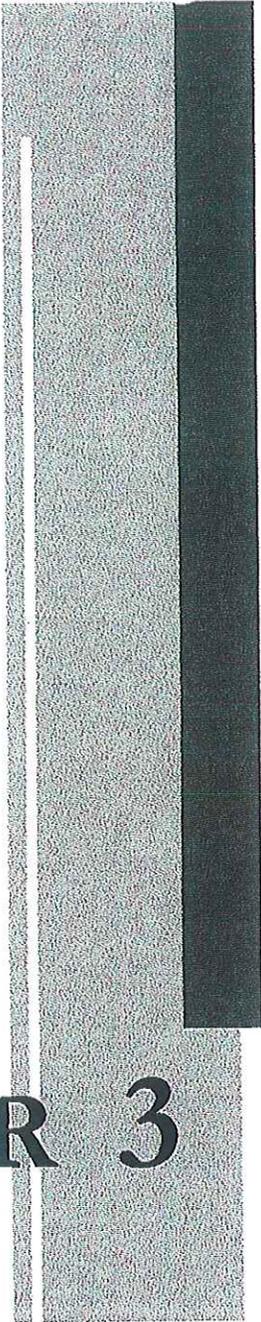
COUNTY-WIDE EQUIPMENT AND MATERIALS

The regular maintenance and replacement of materials and equipment to support the educational programs is important to the viability of older schools.

The CIP includes a reliable funding source to ensure a systematic approach to equipment replacement. This category includes the replacement of vehicles, buses, furniture and multi-media equipment.

CONCLUSION

The planning process is continuous, allowing for coordination with the local governments and communities, capital projects to add student capacity, modernization of existing facilities to provide an equitable school system, improvements to provide for safer environments and improved technology for better planning and communication. The process is an essential balancing act to meet students' needs with available resource and financial capabilities. It is the process that steers the District responsibilities and accomplishments for the overall benefit of the children.



CHAPTER 3

Chapter 3

Enrollment Forecast

Introduction

The State of Florida uses a standard Cohort-Survivorship Model which is the most widely applied forecasting method for school forecasts. Typically a history of each District's grade-by-grade enrollment is compiled and analyzed. This history reveals patterns in the "aging" or progression of students from one grade to the next. And these patterns are extrapolated to develop a basic forecast.

The forecast methodology used in this Plan combines a 'top down' forecast with a 'bottom up' forecast. Using a cohort model, historical data was used to prepare individual school projections. These projections were then modified based on additional information on births, housing, and population projections. This 'bottom up' forecast is then compared to the Department of Education (DOE) forecast for Lake County. To the extent feasible, the forecasts are then reconciled. Any remaining differences should be explainable in light of specific Lake County data.

Demographic shifts are expected in high growth communities like Lake County. In addition, annual changes in school programs can generate near term facility needs. The School District, County, and Municipal staff will work proactively to ensure the best available information can be incorporated into the planning process.

Survivorship Trends

In the last six years, LCPS has shown steady grade to grade increases of around 100 students per grade in Grades 1-8. High schools show a different pattern reflecting some voluntary attrition. Table 3-1 shows the six year trend by grade through Grade 8. This trend of grade to grade growth is driven predominantly by new housing and in-migration. Therefore last two years the trend was down with very little increases in 2008.

In-migration affects specific schools only and must be tracked through a well maintained subdivision database. Through consultation with local governments, new subdivisions can be identified by school service areas. Projected students are then a factor of proposed student yields multiplied by the number of new homes anticipated each year.

Live Births

Table 3-2 shows the history of births in the County and the ratio to the number of kindergarten students that attended LCPS six years later. The number of births in the County has been increasing steadily since 1995. This growth is compounded by in-migration over the five years to create a positive survivorship trend.

Projections assume that the current survivorship ratio will moderate, however LCPS will see more students every year in kindergarten and first grade into the foreseeable future.

Grade to Grade Survivor Ratios 2001-2007

Table 3-1

School Year	Elem. Enrollment	Growth	Kind	Dif.	Grade 1	Dif.	Grade 2	Dif.	Grade 3	Dif.	Grade 4	Dif.	Grade 5	Dif.	Grade 6	Dif.	Grade 7	Dif.	Grade 8
2002	14282	513	2254	144	2286	69	2278	106	2490	153	2474	44	2500	-109	2148	87	2436	148	2462
2003	15247	965	2588	235	2489	156	2442	420	2698	-64	2426	130	2604	149	2649	376	2524	161	2597
2004	16051	846	2755	179	2767	104	2593	270	2712	10	2708	132	2558	140	2744	126	2775	137	2661
2005	16852	801	2835	103	2858	25	2792	259	2852	-73	2639	168	2876	167	2725	96	2840	95	2870
2006	17391	539	2934	97	2932	121	2979	173	2965	-1	2851	136	2775	84	2960	103	2828	48	2888
2007	17391	539	3095	103	3037	96	3028	177	3156	-40	2925	116	2967	-7	2768	14	2974	83	2911
2008	17391	539	2970	0	3095	18	3055	83	3111	-181	2975	35	2960	16	2983	120	2888	41	3015

Table 3-2

Births/Kind	Births	Kindergarten +6 years	Survivorship
1998/ 2003	2165	2254	1.04
1999/ 2004	2216	2588	1.17
2000/ 2005	2314	2748	1.19
2001/ 2006	2465	2835	1.15
2002/ 2007	2584	2934	1.14
2003/ 2008	2729	3095	1.13
2004/ 2009	2,729	2970	1.09
2005/ 2010	2,984	3061	1.03
2006/2011	3,094	3159	1.02
2007/2012	3,176	3306	1.04
2008/2013	3,271	3454	1.06

Sources: Florida DOE Capital Outlay FTE Forecast 2008

Population Growth and New Housing

Five year enrollment projections are based on the standard Cohort Model modified for each school to reflect housing trends and recent boundary changes. This model is compared to the State's projection for a parallel forecast. The state

forecast is for FTE (staffing and funding) purposes and is based on the average of the October and February 'membership' counts. The facilities planning forecast is for the October count only. Therefore the two forecasts will vary slightly, particularly as it relates to high school projections.

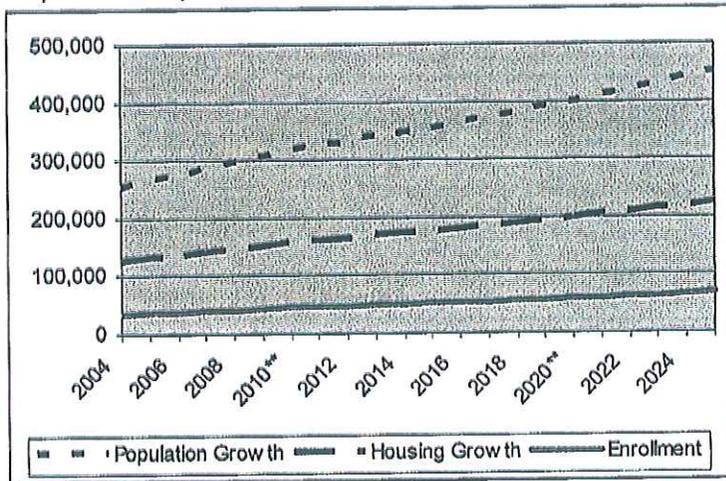
The long term forecast -- through 2025 - is derived using the County's projections for population and housing. Last year, the County's Growth Management staff forecast assumed an average 2.2% growth rate and up to 100,000 new housing units (70% single family) through 2030. The County and Cities are working together this summer/fall to confirm their combined forecast.

Student yields (from the most recent impact fee study) are assumed to be as follows:

Single Family:	.41	Mobile Home:	.145
Multi-family:	.254	Age Restricted:	0

Graph 3.1 shows the projected population and housing increases through 2027 and the proportional enrollment increases. Based on this forecast LCPS can expect approximately 20,935 new students by 2029.

Graph 3-1 – Population, Housing and Enrollment Change



Home School, Charter Schools, and Choice

In 2009, approximately 1,372 students attended non-conversion charter schools (For this Plan conversion schools are treated similar to regular schools for enrollment forecasting.). The majority of students attend schools that are located in the south county area.

Projections assume that the current percentage of students enrolled in charters will remain consistent with past trends until a new charter receives approval from the School Board.

Approximately 1,450 students eligible to attend a Lake County Public School are schooled at home. Projections assume that enrollment in home schooling will also remain consistent with past trends.

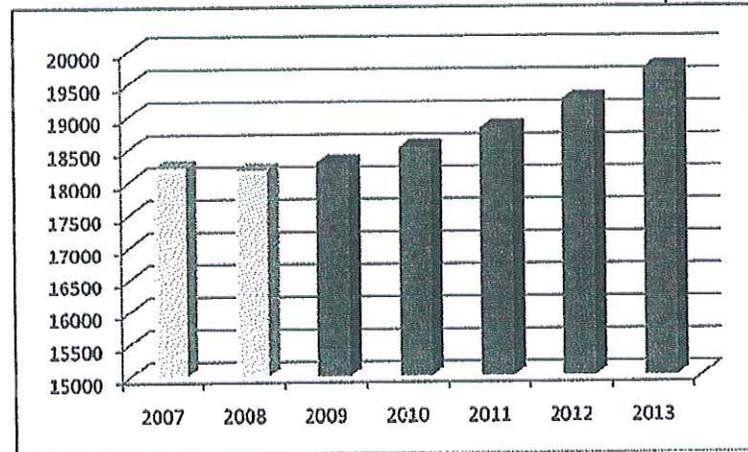
Lake County offers several 'choice' programs at its schools. Enrollment in these programs can be capped for educational or facilities reasons. Schools located near these programs show a pattern of choice that is based on history. Expansion, restrictions or relocation of these programs could impact neighboring communities.

Enrollment Forecast - 2019-2013 (FY 2009-2010)

The five year forecast indicates an increase of 5,700 students, a roughly 15% increase at all three school levels. LCPS is projected to grow from approximately 38,000 students in 2007 to 44,000 students in 2012 (school by school projections are available in Chapter 5).

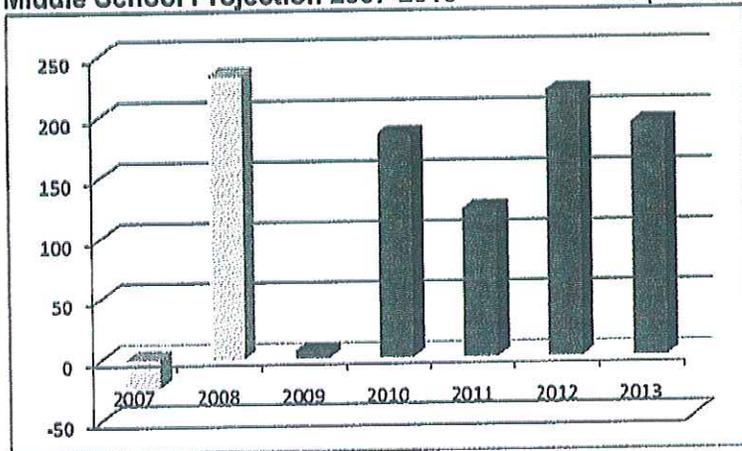
Elementary School Projections 2007-2013

Graph 3-2



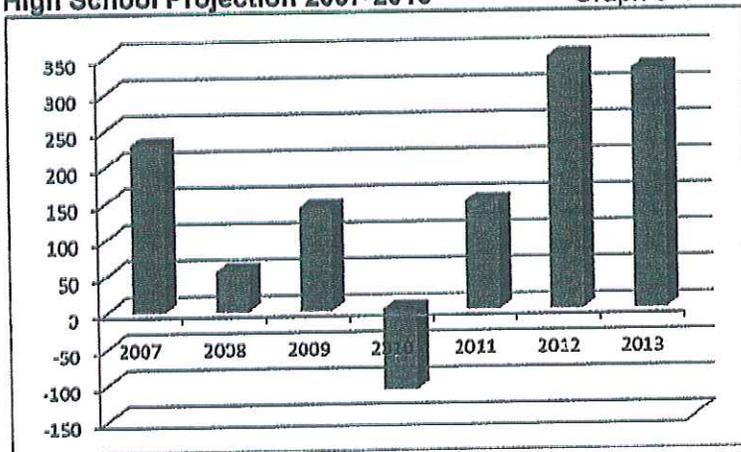
The elementary forecast is driven predominantly by increasing kindergarten sizes as a result of higher birth numbers in the early 2000's. Little in-migration is assumed.

Middle School Projection 2007-2013 Graph 3-3



The unusual growth/no growth pattern in the middle schools is the result of a policy change in 2003 and not part of a long term trend. This will resolve over the next few years in the middle grades but will impact the high schools in later years.

High School Projection 2007-2013 Graph 3-4



Long term growth in the middle and high schools will reflect steady increases similar to what is occurring in the elementary schools.

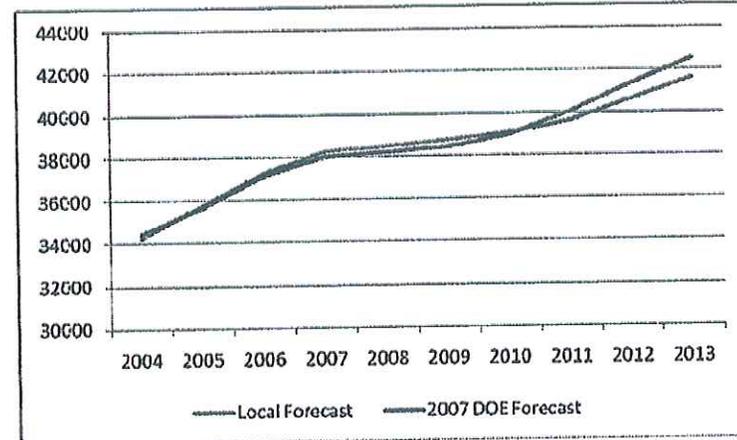
Comparison of Florida CoFTE Forecast

Graph 3-5 shows a comparison of the Florida DOE Capital Outlay FTE forecast (July 2009) with the local forecast for projected annual growth. The local forecast shows higher growth during the next two years with the recovery beginning in 2011. Overall the two forecasts are very similar with the state forecast somewhat higher by 2013.

Annual updates allow demographers to reassess the economic, housing, and political environments that impact population and student enrollment growth. LCPS will update its forecast this winter to reflect new information

Comparison of Growth Forecast Local vs. State COFTE

Graph 3-5

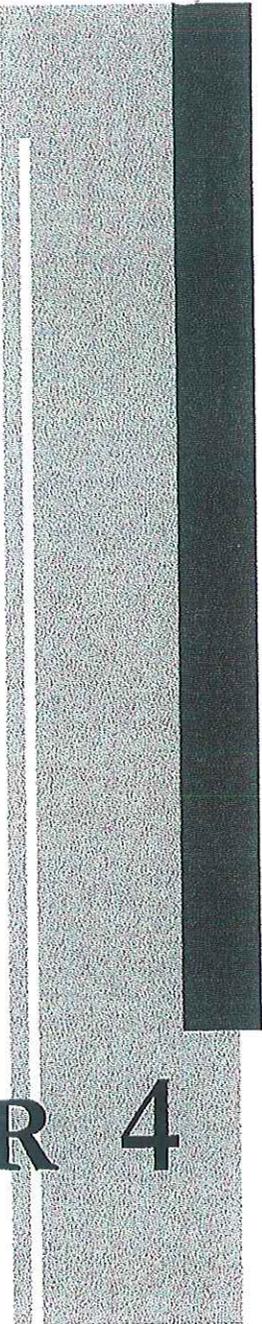


Forecast 2014-2029

The first five years of the Lake County School District's enrollment forecast are based on a standard cohort survivor model modified to reflect housing and program trends. This method is reliable for three to five years of enrollment projections. However, it is not sufficient to forecast many years into the future. Projecting future enrollment is much like the art of archery – the larger and closer the target, the greater the accuracy. As the forecast attempts to predict housing development, population growth, and educational policy for ten and twenty years, it is better to look beyond individual schools and to use County level trends in population projections and zoning and land use capacity.

Approximately 19% of the Lake County population is currently under age 18. In that age group 79% are typically attending public schools with the remaining 21% attending charter or private schools or are being home-schooled. It is expected that this trend will continue.

Based on this analysis, Lake County School Board worked with Lake County Planning staff to develop enrollment projections for 2014 – 2029. These are shown in Chapter 6.



CHAPTER 4

Chapter 4 Recommendations in the FY 2010-14 Work Plan

Long Range Capital Planning Goals

A successful long range capital plan represents a balance between providing for enrollment growth, modernizing older buildings, maintaining the existing infrastructure, and providing all of these through a fiscally prudent Work Plan.

This plan focuses on the following goals and strategies.

- | | |
|----------------|---|
| Goal 1: | Build new capacity as needed for students and programs; plan the use of temporary space to meet peak enrollment periods; evaluate other solutions to capital needs, such as boundary or program changes. |
| Goal 2: | Update schools on a systematic schedule to guarantee safe, up-to-date facilities that meet changing educational program needs. |
| Goal 3: | Provide funding for maintenance and system renovation on a schedule that ensures that buildings remain environmentally safe and function efficiently. |
| Goal 4: | Develop a long-range facilities plan that is fiscally responsible. |
| Goal 5: | Provide for the ancillary facilities that are needed to support the educational program and transportation needs of a growing district. |

These goals are the foundation of the Five-Year Facilities Master Plan and the key to a systematic, consistent process for addressing the long-range facilities needs of the entire School District. They comprise the District's balanced plan to relieve crowded schools, to upgrade older facilities, and to efficiently care for the District's facility infrastructure. Ultimately, the

recommendations in the capital plan should support a focus on instructional programs as the cornerstones of facility planning and design.

Goal 1:	Build new capacity as needed for students and programs; plan the use of temporary space to meet peak enrollment periods; evaluate other solutions to capital needs, such as boundary or program changes.
----------------	---

General strategies:

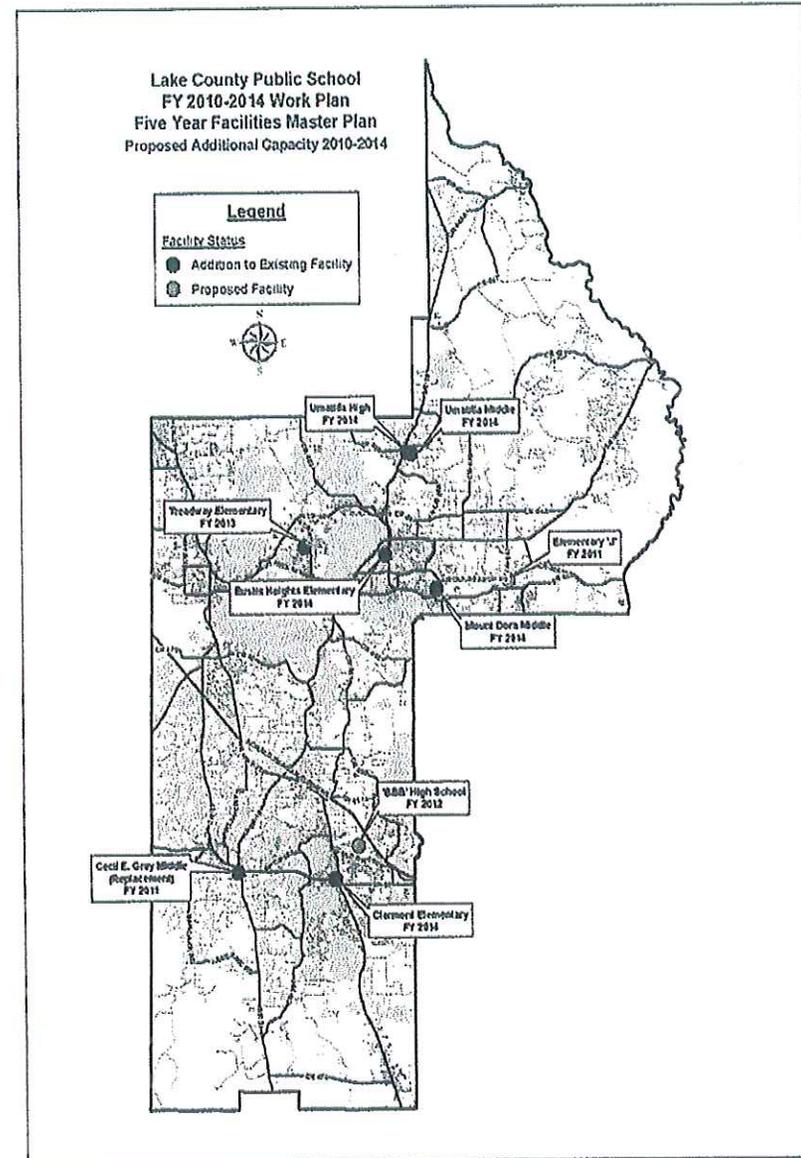
- Build new capacity for the adopted level of service five years out from the date of the Plan
- Plan for school capacity ranges of
 - Elementary Schools 800 – 950
 - Middle Schools 1000 – 1274
 - High Schools 1800 – 2300
- Build new schools where 1) there are sufficient numbers of students in a target area 2) continued growth is likely, and/or 3) existing schools would exceed the desired school size. Build new schools first and follow with additions as needed.
- Build core capacity for future expansion; master plan smaller campuses for potential expansion.
- Prioritize projects by 'most to least over-utilization.'
- Consider alternative grades organizations, schedules, and programs based on each community's needs

- Develop articulation patterns that support cohesive educational communities as boundaries are modified.
- Incorporate planning for choice, career education, Pre-Kindergarten and Exceptional Student Education (ESE).

Summary of Recommendations

New School Capacity thru FY 2014 Table 4-1

Addition of Capacity	Approx. Opening	Additional Capacity	Enrollment Relief To
Sorrento ES (J)	2010	750	Round Lake, Seminole Springs, Eustis
Clermont ES Renovation/Addition	2013	134	Clermont ES
Eustis Heights ES Renovation/Addition	2013	174	Eustis Heights ES
Treadway ES Addition	2012	317	Treadway ES
Additions to support Concurrency	2013-2014	520	CSA 12 and CSA 13 schools
Cecil E Gray MS Renovation/Addition	2010	336	CE Gray MS
Mount Dora MS	2013	514	Mount Dora MS
Umatilla MS	2013	220	Umatilla MS
New HS (BBB)	2011	2,000	East Ridge, South Lake
Umatilla HS 9 th Grade Center	2014	389	Umatilla HS
TOTAL		5,354	



Lake County Public School Five Year Facilities Master Plan

Special, Alternative, and Choice Programs

Lake County Public Schools offers a program for students with severe and profound handicaps at Lake Hills School. A new state-of-the-art facility opened in the summer of 2008 in Howey-in-the-Hills.

Career and vocational programs are offered at the Lake Technical Center in Eustis. This school offers courses in a variety of technical fields to high school students and adults. As the District moves forward with building new high schools in the southern part of the county, it is an opportune time to review the size, location, and diversity of the career education opportunities in the District.

Site Acquisition

Based on the proposed new school plan, LCPS will need up to eleven elementary, six middle, and three high school sites by 2020. The following is a summary of acquisition status.

Site Acquisition Plan

Table 4-4

Schools	Proposed Opening/Need	Status
S. Area ES (L)	2014-19	TBD
Leesburg Area ES (N)	2014-19	TBD
Villages Relief ES (O)	2014-19	Own
ES Groveland (Q)	2014-19	TBD
Mascotte Relief ES (M)	2014-19	Donation pending
Treadway Relief ES (P)	2019-29	Work with City of Tavares
Northeast County ES (V)	2019-29	TBD
ES S. Clermont (U)	2019-29	TBD
ES Howey in the Hills (W)	2019-29	Own
Gray Relief MS (EE)	2019-29	TBD
S. Leesburg MS (FF)	2019-29	TBD
S. Leesburg HS (EEE)	2019-29	TBD
Northwest HS (FFF)	2019-29	TBD

More than 100 acres will be needed in the next ten years and an additional 300 within twenty years. The total cost of site selection if all remaining sites were to be purchased at current market rates is more than \$20 million. Staff will continue to work with cities and developers to encourage donations where it is in the best interest of the District.

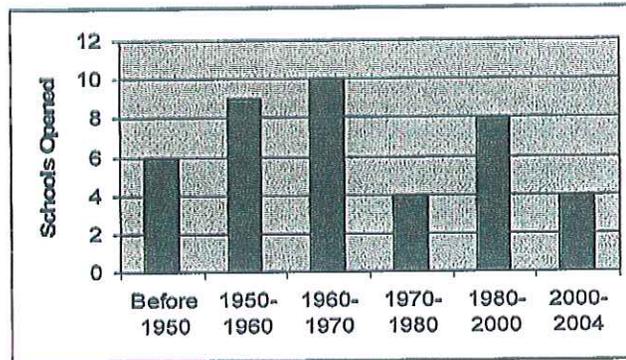
The criteria and the process for site selection is available through Lake County Public Schools Growth Planning.

Goal 2: Update schools on a systematic schedule to guarantee safe, up-to-date facilities that meet changing educational program needs.

The State mandated Plant Survey requires that school districts identify schools that do not meet the current state building standards (SREF) and propose capital projects that will 'update' these schools. Such projects are intended to ensure equitable educational environments across the district and state. The Plant Survey is unique to the State of Florida and is a reminder to many rapidly growing school districts to maintain balance in the capital program.

For many school districts, the Plant Survey projects typically are under-budgeted and, even at that, exceed the ability of the District to fund them. Evidence of this is the never-ending procession of Plant Survey projects at existing schools. To address this 'dollar short' piece meal approach to older buildings, many districts have adopted a modernization program that prioritizes schools based on a physical assessment and educational adequacy score. The District, then, moves systematically through its entire inventory to update and renovate using 'like new' standards.

A number of LCPS facilities were built before 1970 and are more than 35 years old. Some of these buildings may qualify for a comprehensive modernization.



The most recent Plant Survey includes projects at the following existing schools that are intended to bring all or part of the existing school up to state standards:

Clermont ES
 Eustis ES
 Eustis Heights ES
 Cecil E. Gray MS
 Clermont MS

Many of these projects are under-funded to accomplish the scope as defined in the Plant Survey. To bring these projects into alignment with expectations and the budget, the following strategies are proposed:

- Develop school specific educational specifications; conduct feasibility studies; revise budgets or modify scope before proceeding with the project
- Build core capacity to support proposed additions; prioritize additions where core capacity already exists; build to prototype size if projections show need
- During the 2009-2010 school year, District staff from Growth Planning, Facilities and Maintenance will be conducting a Facilities Condition Assessment of all

schools, along with an Educational Sufficiency Assessment. The results of these assessments will be used to develop a systematic plan for renovation and upgrades based on need.

The FY 2010-2014 plan funds project at Clermont ES, Eustis Heights ES, and Cecil Gray MS. The remaining projects remain 'unfunded'.

Goal 3: Provide funding for maintenance and system renovation on a schedule that ensures that buildings remain environmentally safe and secure and function efficiently.

A fully funded maintenance plan is part of a 'life-cycle' approach to maintaining a healthy, safe, and comfortable building infrastructure. A comprehensive growth plan should include consistent, identifiable funding of the maintenance program so as not to underestimate the future fiscal needs of the district.

Table 4-5 below is the maintenance program summary from the 2010-2014 District Work Plan.

Lake County Public School Five Year Facilities Master Plan

Maintenance Projects Summary

Table 4-5

Project	FY2009-10	FY2010-11	FY2011-12	FY2012-13	FY2013-14	5 Year Total
CARPETING	\$50,000	\$50,000	\$65,000	\$65,000	\$75,000	\$305,000
ELECTRICAL	\$0	\$0	\$280,000	\$0	\$0	\$280,000
ELECTRONICS	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$100,000
GEN MAINTENANCE	\$15,500	\$300,000	\$300,000	\$350,000	\$780,094	\$1,745,594
HEALTH & SAFETY	\$60,000	\$133,000	\$215,500	\$231,000	\$259,000	\$898,500
HVAC	\$875,000	\$802,000	\$569,500	\$679,000	\$570,420	\$3,495,920
MINOR RENO	\$0	\$0	\$0	\$0	\$0	\$0
PAINTING/SIDING	\$10,000	\$10,000	\$508,000	\$674,000	\$374,481	\$1,576,481
PLUMBING	\$10,000	\$10,000	\$15,000	\$15,000	\$15,000	\$65,000
ROOFING	\$35,000	\$233,069	\$129,492	\$1,731,762	\$1,482,540	\$3,611,863
SITE IMPROVEMENT	\$174,500	\$174,500	\$174,500	\$174,500	\$174,500	\$872,500
Grand Total	\$1,250,000.00	\$1,732,569.00	\$2,276,992.00	\$3,940,262.00	\$3,751,035.00	\$12,950,858.00

Goal 4: Develop a long-range facilities plan that is fiscally responsible.

The five year revenue forecast for capital projects was reduced by more than \$144 million due to the slow-down in the local economy and state mandates. This was in addition to a decrease of more than \$275 million from the 2007-12 Plan to the 2008-13 Plan. Table 4-6 shows the changes by revenue source.

	FY2010-2014 Revenue Forecast	Change From FY 2009-2013 Forecast
Revenue:		
Local Capital Outlay Levy	\$151,858,150	-\$49,497,625
Sales Tax (1/3 cent)	\$42,779,200	-\$9,217,496
Impact Fee	\$16,000,000	-\$30,038,742
PECO Maintenance (State)	\$8,931,653	-\$1,884,137
PECO Regular (State)	\$12,844,807	-\$2,270,281
Capital Outlay & Debt Service (State)	\$1,335,000	-\$1,168,865
Certificate of Participation (COP)	\$0	-\$48,530,000
Sales Tax Bond	\$0	\$0
Other Misc	\$1,767,500	-\$1,732,500
Total Available	\$235,516,310	-\$144,339,646

Based on this revenue forecast, the District was forced to defer the opening of all new elementary schools or middle schools through the end of the five year period.

In an effort to meet its obligation for Concurrency, The District included classroom additions at schools to maximize the core capacities. However, these classrooms will not address the long term need for new schools.

The fiscal challenge facing LCPS is two-fold – total funding and timing. While enrollment growth is projected to increase by almost 50% over the next twenty years, Lake County is also dealing with a backlog of capital improvements to serve existing development.

This capital plan will list nearly \$400 million in unfunded projects. Some projects are needed to address capacity shortfalls and some to address plant survey renovation requirements. Many of these projects have been in the capital plan for more than 5 years. In addition, the District is struggling to address routine and major maintenance issues.

As part of the 2005 Growth Study, Tischler and Associates was asked to identify and evaluate potential financing mechanisms for school capital needs.

They were as follows:

- *Certificates of Participation (COP)* are popular financing mechanisms for school construction in Florida. With a COP, a school district enters into a lease-purchase agreement to build needed facilities. In Lake County, COPs are used to finance a significant portion of the District's new construction with most backed from a portion of the 1.75 mill District Capital Improvement Tax. (The District is currently maximizing the revenue from this source)
- The District currently levies a 1.5 mill *District Capital Improvement Tax*. Current Board policy is to use this revenue source to correct existing deficiencies and to limit the amount of the tax to be used to back debt to 50 percent of the levy, or 1 mill. Increasing the amount of the tax used to back debt higher than 1 mill would provide additional debt capacity.

- *General Obligation Bonds* represent an alternative financing mechanism for the District. General obligation bonds require voter approval and often carry lower interest rates than other debt financing mechanisms. Issuance of a general obligation bond requires adequate debt capacity backed by a predictable revenue stream such as property taxes.
- The State of Florida provides the opportunity for *additional millages* to be assessed for operating and capital purposes through voter approval. An additional millage above the ten-mill cap can be approved for debt service, which could be done in conjunction with a general obligation bond referendum.
- Lake County currently implements the *Local Government Infrastructure Surtax*, which is categorized by the State as a "Local Discretionary Sales Surtax." Lake County Schools have received a third of the one percent sales tax since January 2003 when voters approved a 15-year extension of the tax. Another local discretionary sales surtax available to Florida counties is the *School Capital Outlay Surtax*. Eligible counties can levy a sales tax of up to .5 percent for school capital expenditures. The surtax must be approved by referendum.
- In 2007, Lake County recalculated its *school impact fees* to better reflect current capital costs. The School District and County should annually update the school impact fees to reflect changes in construction and other capital costs.
- *Special assessment districts* are generally created to link costs and benefits resulting from new or upgraded infrastructure in a limited geographic area. An Educational Facilities Benefit District (EFBD) is a type of special assessment district authorized by the State to assist in financing the construction and maintenance of

educational facilities. Another type of special assessment district is a Community Development District (CDD). Both types of assessment districts are likely to be used in conjunction with revenue bonds or other debt-financing mechanisms and paid over time by the benefiting property owners, usually by means of an additional charge on the property tax bill. In general, special assessment districts are easier to implement in areas where relatively few property owners control large tracts of land.

- A *Qualified Zone Academy Bond (QZAB)* is a financing mechanism authorized by the federal government that allows local districts to save on interest costs on debt issued to repair and renovate existing school facilities, but not new construction. The federal government covers, on average, all of the interest on these bonds, which is actually provided as a tax credit, in lieu of cash, to financial institutions that hold the bonds.
- *Public-private partnerships* for school facility financing are another potential mechanism. Typically, a public-private partnership involves a developer or private entity providing upfront funding to construct a facility with the district repaying the developer over a fixed amount of time. While similar to other funding mechanisms involving debt or lease-purchase arrangements, one potential difference is the flexibility in revenues used to make payments. For example, since these arrangements do not represent traditional debt, impact fee revenues could potentially be used for repayments.
- Two other financing mechanisms are identified requiring *state authorization*. One is increasing the District Capital Improvement Tax above the 2 mills limit currently mandated. The other is a real estate transfer tax, which is a tax on the transfer, sale or conveyance of real property and applied against the price of the property.

CONCLUSIONS

Top-ranking mechanisms include impact fees, sales surtax, and district capital improvement tax/voter-approved millage.

- Impact fees are typically characterized by strong support from existing residents, due to the allocation to and collection from new growth of their fair share of relevant capital costs.
- School capital outlay sales surtax is identified as a top-ranked mechanism even though it receives a negative mark on public acceptance. Sales taxes have the potential to capture revenue from *outside the County*. This may make it an attractive additional capital revenue source for schools.
- A voter-approved millage has high revenue potential but low public acceptance due to the implementation of an additional tax. However, if done in conjunction with a general obligation bond for a finite amount of time for specific projects, public acceptance may increase.
- A general obligation bond is a vehicle for financing, rather than a revenue source. Revenue potential is ranked positively due to the potential for an influx of funding to address major projects at one time, such as the backlog of existing capacity needs. This vehicle has the potential to address timing needs in the first five years of the program.

Lake County Public School Five Year Facilities Master Plan

	<i>Revenue Potential</i>	<i>Technical Ease</i>	<i>Proportionality</i>	<i>Public Acceptance</i>
Certificates of Participation	positive	positive	negative	positive
District Capital Improvement Tax	positive	positive	negative	neutral
General Obligation/Revenue Bonds	positive	negative	negative	negative
Voter-Approved Additional Millage	positive	neutral	negative	negative
Discretionary Sales Surtaxes (School Capital Outlay Surtax)	positive	neutral	negative	negative
Impact Fees	positive	negative	positive	positive
Special Assessment Districts (Educational Facilities Benefit District & Community Development District)	neutral	negative	positive	positive
Qualified Zone Academy Bond	negative	negative	neutral	neutral
Public-Private Partnerships	neutral	negative	positive	positive
Mechanisms Requiring State Action (Increase in 2 mill cap & Transfer Tax)	positive	negative	negative	negative/ neutral

Source: 2005 Growth Study by Tischler & Assoc.

*** Definitions:**

Revenue Potential. This evaluation criterion addresses the relative magnitude of funding from each financing mechanism.

Proportionality. This evaluation criterion relates to striking a balance between the tax or fee burden being considered relative to the demand generated. For example, communities sometimes choose to require developer contributions or exactions for growth-related facilities because the public perception is that existing residents are unfairly paying the costs of new growth.

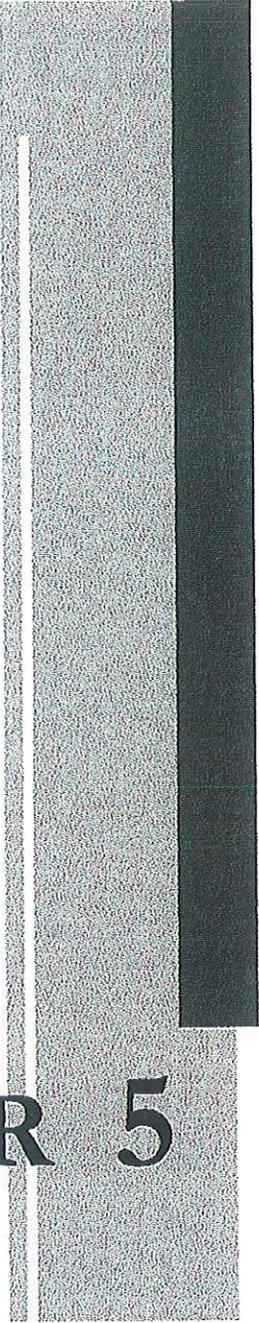
Technical Ease. Each of the potential financing mechanisms requires some technical expertise and administrative effort to implement. They may require, for example, that a school district or local government accommodate a new fee structure or implement separate accounting and reporting requirements as is the case with impact fees.

Public Acceptability. This evaluation criterion often varies by jurisdiction and the type of facility to be funded. It reflects how the majority of *existing residents* are expected to accept each financing or planning mechanism.

Goal 5: Provide for the ancillary facilities that are needed to support the educational program and transportation needs of a growing district.

General Strategies:

- Provide for maintenance facilities and warehouses that allow maintenance workers to access school sites efficiently, in order to reduce time and travel costs.
- Provide for adequate repair facilities for transportation vehicles throughout the County, allowing for greater efficiency and cost-effective transportation of students.
- Provide for adequate parking facilities for transportation vehicles throughout the county.
- Provide for sufficient training sites for both maintenance and transportation workers.
- Develop a 5-10 Year Master Plan for Transportation Facilities that outlines and prioritizes capital projects.
- Develop a plan for effective and efficient reuse of vacant facilities at the former Mascotte Elementary School, Minneola Charter Elementary School, and the Lake Hills School to address existing deficiencies in ancillary facilities.



CHAPTER 5

Chapter 5

Planning Areas

Planning Area 1

East Ridge High School
Clermont Middle School
East Ridge Middle School
Windy Hill Middle School
Clermont Elementary School
Cypress Ridge Elementary School
Grassy Lake Elementary School
Lost Lake Elementary School
Minneola Charter Elementary School
Sawgrass Bay Elementary School

Planning Area 2

South Lake High School
Cecil E. Gray Middle School
Groveland Elementary School
Mascotte Charter Elementary School
Pine Ridge Elementary School

Planning Area 3

Leesburg High School
Carver Middle School
Oak Park Middle School
Beverly Shores Elementary School
Fruitland Park Elementary School
Leesburg Elementary School
Rimes Early Childhood Center
Villages Elementary School

Planning Area 4

Mt. Dora High School
Mt. Dora Middle School
Round Lake Charter School
Triangle Elementary School

Planning Area 5

Eustis High School
Umatilla High School
Eustis Middle School
Umatilla Middle School
Eustis Elementary School
Eustis Heights Elementary School
Seminole Springs Elementary
Spring Creek Elementary School
Umatilla Elementary School

Planning Area 6

Tavares High School
Tavares Middle School
Astatula Elementary School
Tavares Elementary School
Treadway Elementary School

Planning Considerations & Recommendations

Planning Zone 01:East Ridge

Secondary Schools

Community College HS Partnership (DDD) – Delayed beyond 2014

East Ridge HS – Provide enrollment relief with the opening of the new High School (BBB) in 2011

New High School (BBB) – Open 2011; Capacity 1966/Core 2458. Provide relief to East Ridge and South Lake high schools.

Clermont MS – No change

Windy Hill MS – Small addition to support School Concurrency in 2014

East Ridge MS – Opened 2008; Capacity 1274.

Elementary Schools

Clermont ES – Construct a new cafeteria and small classroom addition 2013; Capacity 700.

Cypress Ridge ES – No change

Grassy Lake ES (H) – No change at this time

Lost Lake ES - Provide relief with the opening Elementary School (L) beyond 2014.

Minneola Charter ES – No change.

New South Lake ES (L) – Open beyond 2014; Capacity 940

Sawgrass Bay ES (I) – Small addition in 2014 to support School Concurrency

Effects of Recommendations on Availability of Seats

School	Perm. FISH*	Prior		40th Day		Projected								Comments	
		2008 / 2009		2009 / 2010		2010 / 2011		2011 / 2012		2012 / 2013		2013 / 2014			
		Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats		
Comm. Coll. HS Partnership (DDD)															
East Ridge HS	2166	2957	(791)	2985	(819)	3109	(943)	2078	88	2000	166	2080	86	Open 2011; Cap. 1966; Share w/Zone 2	
New High School (BBB)							1119	367	1333	153	1386	100			
High Total	2166	2957	(791)	2985	(819)	3109	(943)	3197	455	3333	319	3466	186		
Clermont MS	804	690	114	700	104	685	119	718	86	728	76	753	51	Opened 2008	
East Ridge MS (DD)	1274	1017	257	1084	190	1136	138	1170	104	1193	81	1211	63		
Windy Hill MS	909	1109	(200)	1100	(191)	1125	(216)	1173	(264)	1218	(309)	1248	(339)		
Middle Total	2987	2816	171	2884	103	2946	41	3061	(74)	3139	(152)	3212	(225)		
Clermont ES	566	681	(115)	701	(135)	668	(102)	671	(105)	665	(99)	705	(5)	Addition 2013; Capacity 700	
Cypress Ridge	298	614	(316)	606	(308)	614	(316)	611	(313)	609	(311)	622	(324)		
Grassy Lake ES (H)	940	1004	(64)	1012	(72)	1084	(144)	1117	(177)	1197	(257)	1235	(295)		
Lost Lake ES	931	1103	(172)	1162	(231)	1125	(194)	1133	(202)	1124	(193)	1153	(222)	Addition 2014 Open beyond 2014	
Minneola ES	1140	1037	103	1028	128	1041	115	1025	131	1071	85	1107	49		
Sawgrass Bay ES (I)	940	1040	(100)	1058	(118)	1102	(162)	1163	(223)	1263	(323)	1330	(390)		
South Lake ES (L)										0	0	0	0		
Elementary Total	4815	5479	(664)	5567	(736)	5634	(803)	5720	(889)	5929	(1098)	6152	(1187)		
Planning Zone Total	9968	11252	(1284)	11436	(1452)	11689	(1705)	11978	(508)	12401	(931)	12830	(1226)		

Planning Considerations & Recommendations

Planning Zone 02:South Lake

Secondary Schools

South Lake HS – Provide enrollment relief with the opening of the new High School (BBB) in 2011

Cecil E. Gray MS – Open replacement school in 2010 with a capacity for 1274/core capacity of 1274; Provide long term relief with the opening of a Groveland-area Middle School EE beyond 2014.

New Groveland Area MS (EE) – This school is scheduled to open beyond 2014 to provide enrollment relief to Cecil Gray and Clermont middle schools. Monitor development to determine timing.

Elementary Schools

Groveland ES – Provide relief with the opening of the new Groveland Relief School (Q) beyond 2014

New Groveland Area ES (Q) – Monitor development to determine timing

Mascotte ES – No change

Pine Ridge ES – No change

New Mascotte Area ES (M) - Monitor development to determine timing

Effects of Recommendations on Availability of Seats

School	Perm. FISH*	Prior		40th Day		Projected								Comments
		2008 / 2009		2009 / 2010		2010 / 2011		2011 / 2012		2012 / 2013		2013 / 2014		
		Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	
High School (BBB) (shared)								432	(32)	439	(39)	452	(52)	Open 2011; Cap 1966; Share w/ zone 1
South Lake HS	1898	2142	(244)	2154	(186)	2129	(161)	1730	238	1756	212	1807	161	
High Total	1898	2142	(244)	2154	(186)	2129	(161)	2162	206	2195	173	2259	109	
Cecil E. Gray MS	938	1022	(84)	943	(5)	1053	221	1046	228	1064	210	1100	174	Replacement 2010; Capacity 1274 Open beyond 2014
Groveland MS (EE)								0	0	0	0	0	0	
Middle Total	938	1022	(84)	943	(5)	1053	221	1046	228	1064	210	1100	174	
Groveland ES	869	824	45	810	59	846	23	879	(10)	912	(43)	941	(72)	Open beyond 2014
Groveland ES (Q)								0	0	0	0	0	0	
Mascotte Charter ES (K)	940	813	127	819	121	848	92	877	63	902	38	928	12	
Mascotte ES (M)								0	0	0	0	0	0	Open beyond 2014
Pine Ridge ES	898	805	93	784	114	767	131	774	124	786	112	814	84	
Elementary Total	2707	2442	265	2413	294	2461	246	2530	177	2600	107	2683	24	
Planning Zone Total	5543	5606	(63)	5510	103	5643	306	5738	611	5859	490	6042	307	

Planning Considerations & Recommendations

Planning Zone 03:Leesburg

Planning Environment

Secondary Schools

Leesburg HS – No change

Carver MS – No change

Oak Park MS – No change; Monitor enrollment to determine need for a future addition

Elementary Schools

Adjust boundaries among the Leesburg area schools to balance utilization and support School Concurrency beginning 2012

Beverly Shores ES – No change

Fruitland Park ES – No change

Leesburg ES – Provide relief with the opening of new schools beyond 2014

New Leesburg ES (N) – Monitor development to determine timing for this new school

Rimes Early Childhood Center – No change

Villages ES – Provide relief with the opening of Elementary O beyond 2014

New Villages Relief ES (O) – Monitor development to determine timing for this new school

Effects of Recommendations on Availability of Seats

School	Perm. FISH*	Prior		40th Day		Projected								Comments
		2008 / 2009		2009 / 2010		2010 / 2011		2011 / 2012		2012 / 2013		2013 / 2014		
		Enrollment	Seats											
Leesburg HS	2036	1698	338	1749	287	1624	412	1598	438	1638	398	1680	356	
Carver MS	1160	828	332	850	310	816	344	806	354	820	340	848	312	
Oak Park MS	598	620	(22)	561	37	590	8	594	4	610	(12)	622	(24)	
Middle Total	1758	1448	310	1411	347	1406	352	1400	358	1430	328	1470	288	
Beverly Shores ES	660	587	73	617	43	528	132	522	138	525	135	544	116	
Fruitland Park ES	630	598	32	632	20	591	61	599	53	604	48	614	38	Opens beyond 2014
Lady Lake ES (O)								0	0	0	0	0	0	
Leesburg ES	746	940	(194)	944	(198)	955	(209)	946	(200)	870	(124)	883	(137)	
Leesburg ES (N)						0	0	0	0	0	0	0	0	Open beyond 2014
Reassignment from CSA 11										97	(97)	98	(98)	Location(s) TBD
Rimes ES	322	333	(11)	344	(22)	390	(68)	396	(74)	401	(79)	402	(80)	Early Childhood School of Choice
Villages ES	723	811	(88)	816	(93)	809	(86)	831	(108)	838	(115)	841	(118)	
Elementary Total	3081	3269	(188)	3353	(250)	3273	(170)	3294	(191)	3335	(232)	3382	(279)	
Planning Zone Total	6875	6415	460	6513	384	6303	594	6292	605	6403	494	6532	365	

Planning Considerations & Recommendations

Planning Zone 04:Mount Dora

Secondary Schools

Mt Dora HS – No change

Mt Dora MS – Construct addition 2013; New Capacity 1066

Elementary Schools

Round Lake ES – Provide enrollment relief with the opening of Sorrento ES (J) in 2010

Triangle ES – Adjust boundaries with the opening of Sorrento ES (J) in 2010

Sorrento ES (J) - Open 2010; Capacity 750; core 940

Effects of Recommendations on Availability of Seats

School	Perm. FISH*	Prior		40th Day		Projected								Comments
		2008 / 2009		2009 / 2010		2010 / 2011		2011 / 2012		2012 / 2013		2013 / 2014		
		Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	Enrollment	Seats	
Mt. Dora HS	1240	1002	238	1100	154	1025	229	1015	239	1040	214	1061	193	SREF Change Addition 2013; Capacity 1066 Open 2010; Core 940; FISH Cap 750
Mt. Dora MS	626	732	(107)	717	(92)	747	(122)	761	(136)	796	(171)	793	273	
Round Lake ES	697	1145	(448)	1177	(480)	703	(6)	737	(40)	758	(61)	792	(95)	
Sorrento ES (J)						704	46	734	16	786	(36)	811	(61)	
Triangle ES	796	627	169	607	189	657	139	671	125	676	120	705	91	
Elementary Total	1493	1772	(279)	1784	(291)	2064	179	2142	101	2220	23	2308	(65)	
Planning Zone Total	3358	3506	(148)	3601	(229)	3836	286	3918	204	4056	66	4162	401	

Planning Considerations & Recommendations

Planning Zone 05:North County

Secondary Schools

Eustis HS (and Curtright Center) – Reviewing need for addition

Umatilla HS – Open addition and core expansion in 2014 to serve up to 350 students; Capacity 1225

Eustis MS – No change

Umatilla MS – Open addition in 2013; Capacity 914/Core 1142

Elementary Schools

Eustis ES – Boundary adjustments with the opening of Sorrento ES (J) in 2010

Eustis Heights ES – Addition/renovation opens 2013; New capacity 940.

Seminole Springs – Provide enrollment relief with the opening on new Elementary School (J) in 2010

Spring Creek ES – House up to two classes of sixth grade

Umatilla ES – No change

Effects of Recommendations on Availability of Seats

School	Perm. FISH*	Prior		40th Day		Projected								Comments
		2008 / 2009		2009 / 2010		2010 / 2011		2011 / 2012		2012 / 2013		2013 / 2014		
		Enrollment	Seats											
Eustis HS	1291	1350	(59)	1315	(23)	1326	(34)	1356	(64)	1412	(120)	1452	(160)	SREF Change 2014 Add 9th Ctr, Core; FISH Cap 1225
Umatilla HS	801	926	(125)	895	(94)	880	(79)	889	(88)	891	(90)	875	(74)	
High Total	2092	2276	(184)	2210	(117)	2206	(113)	2245	(152)	2303	(210)	2327	(234)	
Eustis MS	1157	1108	49	1056	101	1180	(23)	1158	(1)	1176	(19)	1192	(35)	2013 addition; FISH Cap 914
Umatilla MS	716	684	32	690	26	664	52	680	36	698	18	703	211	
Middle Total	1873	1792	81	1746	127	1844	29	1838	35	1874	(1)	1895	176	
Eustis ES	475	570	(95)	560	(85)	514	(39)	519	(44)	540	(65)	526	(51)	Addition 2013; Capacity 940
Eustis Heights ES	763	666	97	642	162	655	149	634	170	619	185	629	311	
Seminole Springs ES	579	884	(305)	862	(283)	707	(128)	727	(148)	721	(142)	727	(148)	
Spring Creek ES	649	616	33	581	68	638	11	647	2	650	(1)	650	(1)	
Umatilla ES	701	690	11	713	(12)	691	10	706	(5)	729	(28)	754	(53)	
Elementary Total	3167	3426	(259)	3358	(150)	3205	3	3233	(25)	3259	(51)	3286	58	
Planning Zone Total	7132	7494	(362)	7314	(140)	7255	(81)	7316	(142)	7436	(262)	7508	0	

01-Jul-09

Planning Considerations & Recommendations

Planning Zone 06:Tavares

Secondary Schools

Tavares HS – No change

Tavares MS – No change

Elementary Schools

Astatula ES – Monitor enrollment

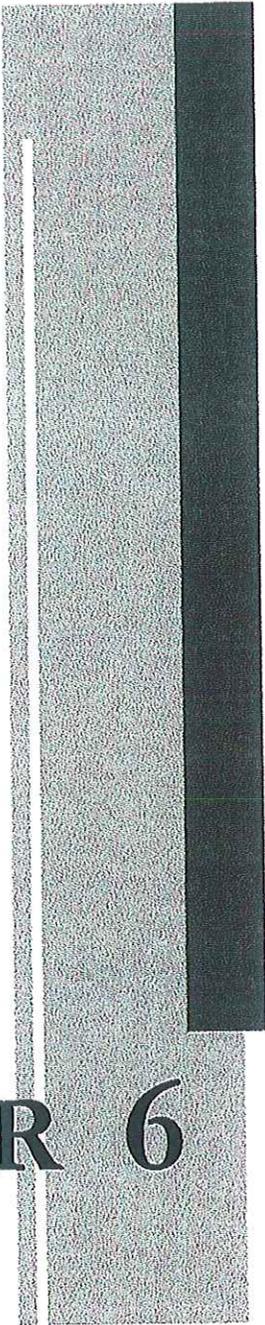
Tavares ES – Enrollment relief will be provided with the opening of a new school beyond 2014; Monitor enrollment to determine timing

Treadway ES – Construct addition 2012; New capacity 997

New Treadway Relief ES (P) – Open beyond 2014

Effects of Recommendations on Availability of Seats

School	Perm. FISH*	Prior		40th Day		Projected								Comments
		2008 / 2009		2009 / 2010		2010 / 2011		2011 / 2012		2012 / 2013		2013 / 2014		
		Enrollment	Seats											
Tavares HS	1511	1324	187	1346	165	1321	190	1340	171	1392	119	1417	94	Open beyond 2014 Addition 2012; Capacity 997
Tavares MS	1137	1006	131	1006	151	1017	140	1031	126	1053	104	1078	79	
Astatula ES	701	733	(32)	685	16	760	(59)	766	(65)	778	(77)	780	(79)	
Tavares ES	763	764	(1)	795	(32)	806	(43)	825	(62)	842	(79)	857	(94)	
Tavares ES (P)										0	0	0	0	
Treadway ES	670	1014	(344)	955	(263)	993	(301)	999	(307)	997	0	995	2	
Elementary Total	2134	2511	(377)	2435	(279)	2559	(403)	2590	(434)	2617	(156)	2632	(171)	
Planning Zone Total	4782	4841	(59)	4787	37	4897	(73)	4961	(137)	5062	67	5127	2	



CHAPTER 6

Chapter 6

Ten and Twenty Year Facilities Plan

METHODOLOGY

The first five years of the Lake County School District's enrollment forecast are based on a standard cohort survivor model modified to reflect housing and program trends. This method is reliable for three to five years of enrollment projections. However, it is not sufficient to forecast many years into the future. Projecting future enrollment is much like the art of archery – the larger and closer the target, the greater the accuracy. As the forecast attempts to predict housing development, population growth, and educational policy for ten and twenty years, it is better to look beyond individual schools and to use County level trends in population projections and zoning and land use capacity.

The Lake County Planning and Community Design Department has developed population projections by municipality through the year 2030. (See Table 6A) These projections were used as the basis for development of the District's ten and twenty-year enrollment projections.

In 2008, the Lake County School District had approximately 38,514 students enrolled. By 2019 this number is projected to grow by 24% to 47,884 students. (Note: State DOE 7/09 forecast shows 52,301 in 2019) Between 2019 and 2028 enrollment is projected to increase to over 59,000 students representing additional growth of 24%. This represents a 54% increase in the District's enrollment over the next 20 years.

Between 2002 and 2008 the overall population grew by 14% from 231,072 to an estimated 283,918. In 2002 enrollment in Lake County's schools was 30,378 representing over 13.15% of the county's overall population. While K-12 enrollment in Lake County schools grew by 26% between 2002 and 2008 from 30,378 to 38,514, the portion of the overall population it represented increased slightly to 13.57%. This percentage is projected to remain consistent through the next 10-20 years. This will translate to a moderate increase in enrollment in Lake County Schools over the next twenty years.

SUMMARY OF RECOMMENDATIONS

With this expected growth the District will be faced with the challenge of finding property, identifying funding, and constructing the functional equivalent of 9 new elementary schools, 2 new middle schools, and 2 new high schools.

To meet the facility needs of the projected enrollment between 2014 and 2019, the District needs to plan for and construct student stations equal to 5 new elementary schools, classroom additions at Umatilla and Mount Dora Middle Schools, and a classroom addition at Umatilla High School. Between 2019 and 2029 the District will need the equivalent of 4 new elementary schools, 2 new middle schools, and 2 new high schools, along with various elementary classroom additions.

Tables 6-1 through 6-4 show the projected enrollment, recommended location by geographic area for the new schools, planned capacity, projected cost, and approximate year of construction.

Population Trends and Projections

Table 6A

Cities	1990	2000	2005	Proj 2010	Proj 2015	Proj 2020	Proj 2025	Proj 2030	% Change 2000 - 2030
Astatula	981	1,298	1,461	1,622	2,269	2,524	2,780	3,074	137%
Clermont	6,910	9,338	20,017	27,965	36,441	44,480	51,794	58,799	529%
Eustis	12,856	15,106	17,249	18,760	19,820	20,880	21,715	22,597	50%
Fruitland Park	2,715	3,186	3,463	5,776	7,827	9,878	11,929	14,620	359%
Groveland	2,300	2,394	4,550	8,898	12,660	18,015	25,633	38,468	1,507%
Howey-in-the-Hills	724	956	1,107	1,394	1,518	1,655	1,803	1,970	106%
Lady Lake	8,071	11,828	12,709	15,246	16,051	16,899	17,791	18,750	59%
Leesburg	14,783	15,956	17,467	21,675	29,525	38,252	46,752	55,979	250%
Mascotte	1,761	2,687	4,001	6,221	7,701	9,535	11,804	14,893	454%
Minneola	1,515	5,435	8,867	11,184	24,292	32,818	37,896	44,134	712%
Monteverde	890	882	1,157	1,355	1,463	1,579	1,705	1,845	109%
Mount Dora	7,316	9,418	10,899	11,377	12,872	14,564	16,478	18,643	98%
Tavares	7,383	9,700	11,340	13,840	16,939	20,487	24,925	30,813	218%
Umatilla	2,350	2,214	2,509	3,174	3,552	3,992	4,509	5,559	151%
Unincorporated	81,549	120,129	146,221	149,363	139,120	126,042	110,386	79,906	-34%
Total	152,104	210,527	283,017	297,850	332,050	361,600	387,900	410,050	95%

Source: Lake County Planning and Community Design Department, September 8, 2009

TEN YEAR FACILITIES PLAN

Enrollment Forecast thru 2018/19

Table 6-1

District Totals	FY 2019 Projected Enrollment	2009/10 Capacity	Add'l Planned Capacity Thru FY 2014	Total Existing and Planned Capacity thru FY 2014	Add'l Projected Capacity Thru FY 2019	# Schools FY 2014 - 2019
Elementary	23,764	17,588	1,321	18,909	4,855	5
Middle	10,901	9,338	975	10,313	588	0
High	13,219	11,028	2,376	13,404	0	0
Total	47,884	37,954	4,672	42,626	5,443	

Source: Lake County Planning Department, Lake County Public Schools

Recommended Additional Capacity through 2018/19

Table 6-2

School Type	Location	Planned Capacity ¹	Cost Per Stu.Sta. ²	Projected Cost ³	Approximate Year
Elementary "L"	South County	940	\$20,965	\$19,707,100	2014
Elementary "N"	Leesburg Area	940	\$21,371	\$20,088,740	2015
Elementary "Q"	Groveland	940	\$21,795	\$20,487,300	2016
Elementary "O"	Lady Lake Area	940	\$22,210	\$20,877,400	2017
Elementary "M"	Mascotte Area	940	\$22,625	\$21,267,500	2018
ES Addition	South County	300	\$20,965	\$6,289,500	2014
MS Addition	South County	441	\$23,351	\$10,692,927	2014
MS Addition	North Area	198	\$24,247	\$4,623,498	2016
Umatilla HS Addition	Umatilla	424	\$30,572	\$12,962,528	2014
Total		6,063		\$136,996,493.00	

- (1) Please note this is planned FISH capacity and not student stations.
- (2) Projected cost of facility divided by the number of student stations.
- (3) Local costs increased by CPI.

TWENTY YEAR FACILITIES PLAN

Enrollment Forecast thru 2028/29

Table 6-3

District Totals	FY 2029 Projected Enrollment	Total Existing and Planned Capacity thru FY 2019	Add'l Planned Capacity Thru FY 2029	# Schools FY 2019 - 2029
Elementary	27,936	23,909	4,027	4
Middle	13,457	10,952	2,505	2
High	18,056	13,828	4,228	2
Total	59,449	48,689	10,760	

Recommended Additional Capacity through 2028/29

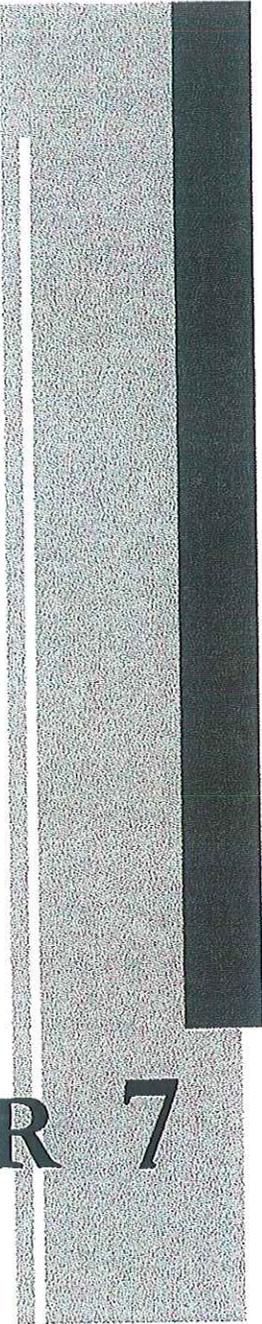
Table 6-4

School Type	Location	Planned Capacity ¹	Cost Per Stu.Sta. ²	Projected Cost ³	Approximate Year
Elementary "P"	Tavares	940	\$23,489	\$23,369,340	2020
Elementary "V"	Northeast Lake County	940	\$24,434	\$22,967,960	2022
Elementary "U"	South Lake County	940	\$25,780	\$24,233,200	2025
Elementary "W"	North-Central Lake County	940	\$26,775	\$25,168,500	2028
Middle "EE"	South Lake County	1,274	\$26,135	\$33,295,990	2022
Middle "FF"	Northwest Lake County	1,274	\$29,273	\$37,293,802	2024
HS Addition	North Central	300	\$30,572	\$12,962,528	2019
High "EEE"	South-Central Lake County	1,967	\$34,860	\$68,569,620	2024
High "FFF"	Northwest Lake County	1,967	\$36,887	\$72,556,729	2027
Total		10,542		\$320,417,669.00	

(1) Please note this is planned FISH capacity and not student stations.

(2) Projected cost of facility divided by the number of student stations.

(3) Local costs increased by CPI.



CHAPTER 7

Chapter 7 Concurrency

Introduction

In 2005, Governor Jeb Bush signed into law Senate Bill 360 (SB 360), effecting changes to the State's growth management legislation. One of the key features of SB 360 is the requirement for all counties to implement a school concurrency program by December 1, 2008. Six communities were selected by the Departments of Community Affairs and Education as "Pilot Communities" for drafting the documents necessary for the implementation of school concurrency. Lake County was selected and chose to participate as a Pilot Community.

Interlocal Agreement

Negotiations among the County, School Board and municipalities resulted in an interlocal agreement, which became effective when the School Board, County and all the municipalities approved it in 2007. In late 2007 and early 2008, a series of minor amendments covering meeting dates and site plan review were approved by the Education Concurrency Review Committee and the local governments, based upon recommendations from the Department of Community Affairs.

Key provisions of the interlocal agreement are agreements on:

- Requirements for staff and appointed committees to meet regularly;
- Methodologies for projecting population and student generations;
- Regular reporting of growth and development trends;
- Colocation and shared use of facilities;

- City and County review of the School Board's Work Plan;
- Cooperation on the Public Schools Facilities Element, and zonings and Future Land Uses in which schools shall be allowed;
- Considerations to be made in locating, renovating or closing schools;
- City and County review of site/development plans;
- Level of service standards and concurrency service areas;
- Methodologies for determining school capacity and concurrency; and
- Mitigation alternatives when no capacity is available.

For concurrency purposes, the most important of these are the level of service standards, the location of and process for amending concurrency service areas, methodologies for determining school capacity and concurrency, and the mitigation alternatives.

Level of Service Standards

The interlocal agreement states that, "The LOS standard to be used by the County and the School Board to implement school concurrency shall be as follows:

- (1) Elementary: 100% of permanent FISH capacity. If core dining capacity is available in excess of FISH capacity, the school capacity shall be increased up to 125% of FISH capacity by adding seats located in temporary student stations so long as the total capacity does not exceed core dining capacity.

approval was issued. Amendments to the CSAs and attendance zones shall be designed to make efficient use of new and existing public school facilities in accordance with the LOS standards [In the interlocal agreement].”

Determinations of Capacity and Concurrency

The process outlined in the interlocal agreement provides for the City or County to issue School Concurrency Determinations, upon notification from the School Board that there is either capacity within the relevant Concurrency Service Area (or an adjacent CSA, as outlined below), or that an acceptable mitigation alternative with the developer has been reached. The language in the interlocal agreement is as follows:

- “(1) The County and City will accept and process final plats and residential site plans including five (5) or more units only after the applicant has complied with the terms of the County or City’s School Concurrency Ordinance. The County or City may approve a School Concurrency Application earlier in the approval process if requested by the applicant, the School Board reviews and approves the determination, allocations of capacity and proportionate share mitigation commitments as provided in this Subsection.
- (2) School Concurrency Applications shall be filed with the School Board. Upon the receipt of a complete School Concurrency Application, the School Board will transmit a copy of the application to the City or County in whose jurisdiction the development lies.

The School Board shall make a determination whether there is adequate school capacity, for each level of school, to accommodate the proposed development, based on the LOS standards, CSAs, and other standards set forth herein.

- (3) Within thirty (30) days of the initial application, the School Board will review the School Concurrency Application and, based on the standards set forth in this Agreement, report in writing to the County or City:
 - a. Whether adequate school capacity exists for each level of school, based on the standards set forth in this Agreement; or
 - b. If adequate capacity does not exist, whether appropriate mitigation can be accepted, and if so, acceptable options for mitigation, consistent with this Agreement.
- (4) If the School Board determines that adequate capacity will not be in place or under actual construction within 3 years after the issuance of final subdivision or site plan approval and mitigation is not an acceptable alternative, the County or City will not issue a School Concurrency Determination and will not accept or process a development application.
- (5) If the School Board determines that adequate capacity does not exist but that mitigation is an acceptable alternative, the development application will remain active pending the conclusion of the mitigation negotiation period described below.
- (6) The County or City will issue a School Concurrency Determination only upon:
 - a. The School Board’s written determination that adequate school capacity will be in place or under actual construction within 3 years after the issuance of final subdivision or site plan approval for each level of school without mitigation; or the School Board’s written acknowledgement that the

payment of proportionate share provided by sections 5.6 (2) or (3) has been made, or

- b. The execution of a legally binding mitigation agreement between the applicant, the local government and the School Board, as provided by this Agreement."

In addition, the agreement lays out the School Board's methodology for determining if there is capacity within the relevant CSA, adding the planned and existing capacities together, then subtracting used capacity (existing students), the portions of reserved and/or previously approved developments to be constructed within three years, and the demand from the proposed development. If the relevant CSA does not have capacity, the interlocal then directs the School Board to "determine whether a contiguous CSA has available school capacity by identifying the contiguous CSA with the most available school capacity for the particular type of school and assigning the demand from the proposed development to that CSA."

2009's Senate Bill 360 states that "For the purpose of determining whether levels of service have been achieved, for the first 3 years of school concurrency implementation, a school district that includes relocatable facilities in its inventory of student stations shall include the capacity of such relocatable facilities as provided in s. 1013.35(2)(b)2.f., provided the relocatable facilities were purchased after 1998 and the relocatable facilities meet the standards for long-term use pursuant to s. 1013.20." Lake County Schools has analyzed all relocatable facilities in the District, and determined that only those modular classrooms located at Cypress Ridge Elementary School meet the tests set forward in Section 1013.20 of the Florida State Statutes. Therefore the relocatable capacity at Cypress Ridge has been added to the concurrency capacity for that school in the following tables.

Mitigation Alternatives

In the event that no capacity is available in the relevant or adjacent CSAs, pursuant to SB 360 and the interlocal agreement, there are several mitigation alternatives available. The interlocal states that "If a project which would cure the capacity deficiency and provide capacity for the applicant is currently listed in the 4th or 5th year of the School Board's five year capital improvement plan [CIP], with the consent of the School Board, an applicant may satisfy concurrency by the payment of proportionate share... or by entering into a mitigation agreement with the school board and local government." Proportionate share is calculated by multiplying the number of new student stations required to serve the new development by the cost of providing a student station, as determined by the most recent School Impact Fee Study approved by the School Board and Lake County. According to the interlocal agreement, "Pursuant to Section 163.3180(13)(e) (2), Florida Statutes, the applicant's proportionate-share mitigation obligation will be credited toward any other impact fee or exaction imposed by local ordinance for the same need, on a dollar-for-dollar basis, at fair market value". In the event the project is not on the five year CIP, the agreement states that "mitigation may still be accepted by the School Board so long as the mitigation agreement provides that the capital improvement plan shall be amended to incorporate the proposed mitigation project. Acceptable forms of mitigation in this case may include but are not limited to:

- a. The donation, construction, or funding of school facilities (including charter schools which meet the requirements of s. 5.2.4) sufficient to offset the demand for public school facilities to be created by the proposed development.
- b. The creation of mitigation banking based on the construction of a public school facility in exchange for the right to sell capacity credits."

Public School Facilities Elements

The concurrency process is instituted once all jurisdictions within the County have adopted both a Public Schools Facilities Element into their Comprehensive Growth Management Plans, and have adopted implementing ordinances into their Land Development Regulations. As of the publishing of this document, all of the County's jurisdictions had adopted their required Public Schools Facilities Elements.

Implementing Ordinances

The implementing ordinance which codifies the school concurrency process in each jurisdiction's Land Development Regulations is another important element of the concurrency implementing process. As of this writing, most of the local governments within the District have adopted an implementing ordinance, and those who had not yet adopted one expect to by the end of 2009.

Concurrency Analysis

The interlocal agreement requires that the School Board include in the Educational Facilities Work Program the projected student population apportioned geographically by CSA. The following tables include the capacity and projected enrollment for the schools in each CSA, along with recommendations and projected capital costs for implementing recommended actions.

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Spring Creek ES	811	616	811	76%	581	811	72%	638	811	79%	647	811	80%	650	811	80%	650	811	80%
Elementary 6 Total	811	616	811	76%	581	811	72%	638	811	79%	647	811	80%	650	811	80%	650	811	80%

Capital and Non Capital Considerations

High School and Middle School – See CSA #2

Spring Creek ES - (Conversion Charter School) Permanent FISH = 649; House up to two classes of sixth grade

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %	Enroll	Cap	Util %												
Umatilla HS	801	926	801	116%	895	801	112%	880	801	110%	889	801	111%	891	801	111%	875	801	109%
High Total	801	926	801	116%	895	801	112%	880	801	110%	889	801	111%	891	801	111%	875	801	109%
Umatilla MS	716	684	716	96%	690	716	96%	664	716	93%	680	716	95%	698	716	97%	703	1143	62%
Middle Total	716	684	716	96%	690	716	96%	664	716	93%	680	716	95%	698	716	97%	703	1143	62%
Umatilla ES	876	690	876	79%	713	876	81%	691	876	79%	706	876	81%	729	876	83%	754	876	86%
Elementary Total	876	690	876	79%	713	876	81%	691	876	79%	706	876	81%	729	876	83%	754	876	86%

Capital and Non Capital Considerations

Umatilla HS – Addition in 2014; New capacity/LOS 1225

Umatilla MS – Addition in 2013; New capacity 914; New LOS 1142

Umatilla ES - Permanent FISH = 701; Plan for future addition when funding is available

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Seminole Springs ES	724	884	724	122%	862	724	119%	707	724	98%	727	724	100%	721	724	100%	727	724	100%
Elementary Total	724	884	724	122%	862	724	119%	707	724	98%	727	724	100%	721	724	100%	727	724	100%

Capital and Non Capital Considerations

High School and Middle School – See CSA #4

Seminole Springs ES - FISH capacity 579; Boundaries adjusted with the opening of Elementary School J in 2010 to support better utilization

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Eustis HS	1581	1350	1581	85%	1315	1615	81%	1326	1615	82%	1356	1615	84%	1412	1615	87%	1452	1615	90%
High Total	1581	1350	1581	85%	1315	1615	81%	1326	1615	82%	1356	1615	84%	1412	1615	87%	1452	1615	90%
Eustis MS	1327	1108	1327	83%	1056	1327	80%	1180	1327	89%	1158	1327	87%	1176	1327	89%	1192	1327	90%
Middle Total	1327	1108	1327	83%	1056	1327	80%	1180	1327	89%	1158	1327	87%	1176	1327	89%	1192	1327	90%
Eustis ES	519	570	519	110%	560	519	108%	514	519	99%	519	519	100%	540	519	104%	526	519	101%
Eustis Heights ES	763	666	763	87%	642	804	80%	655	804	81%	634	804	79%	619	804	77%	629	940	67%
Elementary Total	1282	1236	1282	96%	1202	1323	91%	1169	1323	88%	1153	1323	87%	1159	1323	88%	1155	1459	79%

Capital and Non Capital Considerations

Eustis HS – Reviewing need for addition

Eustis MS – No change

Eustis ES – FISH capacity 475; Boundaries adjusted with the opening of Elementary School J in 2010 to support better utilization

Eustis Heights ES – Renovation and portable replacement 2013; Capacity 940

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %
Mt. Dora HS	1367	1002	1367	73%	1100	1367	80%	1025	1367	75%	1015	1367	74%	1040	1367	76%	1061	1367	78%
High Total	1367	1002	1367	73%	1100	1367	80%	1025	1367	75%	1015	1367	74%	1040	1367	76%	1061	1367	78%
Mt. Dora MS	781	732	781	94%	717	781	92%	747	781	96%	761	781	97%	796	781	102%	793	1241	64%
Middle Total	781	732	781	94%	717	781	92%	747	781	96%	761	781	97%	796	781	102%	793	1241	64%
Round Lake ES	871	1145	871	131%	1177	871	135%	703	871	81%	737	871	85%	758	871	87%	792	871	91%
Sorrento ES (J)		0			0			704	937	75%	734	937	78%	786	937	84%	811	937	87%
Triangle ES	796	627	796	79%	607	796	76%	657	796	83%	671	796	84%	676	796	85%	705	796	89%
Elementary Total	1667	1772	1667	106%	1784	1667	107%	2064	2604	79%	2142	2604	82%	2220	2604	85%	2308	2604	89%

Capital and Non Capital Considerations

Mt Dora HS – Permanent FISH capacity 1240; No action required at this time

Mt Dora MS – Permanent FISH = 625; Addition 2013; New concurrency capacity is 1241

Round Lake ES – (Conversion Charter School) Permanent FISH = 697; Provide enrollment relief with the opening of Elementary School J in 2010

Triangle ES – Permanent FISH = 796; Boundary adjustment with the opening of Elementary School J in 2010

Sorrento Elementary School (J) – Open 2010; Capacity 750 with core capacity of 940

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Tavares HS	1511	1324	1511	88%	1346	1511	89%	1321	1511	87%	1340	1511	89%	1392	1511	92%	1417	1511	94%
High Total	1511	1324	1511	88%	1346	1511	89%	1321	1511	87%	1340	1511	89%	1392	1511	92%	1417	1511	94%
Tavares ES	954	764	954	80%	795	954	83%	806	954	84%	825	954	86%	842	954	88%	857	954	90%
Elementary Total	954	764	954	80%	795	954	83%	806	954	84%	825	954	86%	842	954	88%	857	954	90%

Capital and Non Capital Considerations

Tavares HS – No action required at this time

Middle Schools – See CSA #10

Tavares ES – Permanent FISH capacity 763; No action required at this time

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Tavares ES (P)		0			0			0			0			0			0		
Treadway ES	838	1014	838	121%	955	865	110%	993	865	115%	999	865	115%	997	997	100%	995	997	100%
Elementary Total	838	1014	838	121%	955	865	110%	993	865	115%	999	865	115%	997	997	100%	995	997	100%

Capital and Non Capital Considerations

High School and Middle School – See CSA #10

Treadway ES – Permanent FISH =670; Addition 2012; New capacity 997

New Treadway/Tavares Relief ES (P) – Open beyond 2014; Acquire site as soon as possible

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Lady Lake ES (O)		0			0			0			0			0			0		
Villages ES	904	811	904	90%	816	904	90%	809	904	89%	831	904	92%	838	904	93%	841	904	93%
Elementary Total	904	811	904	90%	816	904	90%	809	904	89%	831	904	92%	838	904	93%	841	904	93%

Capital and Non Capital Considerations

High School and Middle School – See CSA #9

New Villages Relief ES (O) – Open beyond 2014; Capacity 600/Core 940

Villages ES - Permanent FISH = 723; Provide enrollment relief with the opening of a new Elementary School (O) when funding is available

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Leesburg HS	2036	1698	2036	83%	1749	2036	86%	1624	2036	80%	1598	2036	78%	1638	2036	80%	1680	2036	83%
High Total	2036	1698	2036	83%	1749	2036	86%	1624	2036	80%	1598	2036	78%	1638	2036	80%	1680	2036	83%
Carver MS	1211	828	1211	68%	850	1160	73%	816	1160	70%	806	1160	69%	820	1160	71%	848	1160	73%
Middle Total	1211	828	1211	68%	850	1160	73%	816	1160	70%	806	1160	69%	820	1160	71%	848	1160	73%
Beverly Shores ES	825	587	825	71%	617	825	75%	528	825	64%	522	825	63%	525	825	64%	544	825	66%
Fruitland Park ES	781	598	781	77%	632	765	83%	591	765	77%	599	765	78%	604	765	79%	614	765	80%
Reassignment from CSA 11		0			0			0			0			97	0		98	0	
Rimes ES	403	333	403	83%	344	403	85%	390	403	97%	396	403	98%	401	403	100%	402	403	100%
Elementary Total	2009	1518	2009	76%	1593	1993	80%	1509	1993	76%	1517	1993	76%	1627	1993	82%	1658	1993	83%

Capital and Non Capital Considerations

Leesburg HS – No action required at this time

Carver MS – No action required at this time

Beverly Shores ES – Permanent FISH = 660

Fruitland Park ES – Permanent FISH = 630

Rimes School – Permanent FISH = 322

Adjust boundaries among Leesburg area schools to balance enrollment and support School
Concurrency beginning 2012

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Tavares MS	1421	1006	1421	71%	1006	1427	70%	1017	1427	71%	1031	1427	72%	1053	1427	74%	1078	1427	76%
Middle Total	1421	1006	1421	71%	1006	1427	70%	1017	1427	71%	1031	1427	72%	1053	1427	74%	1078	1427	76%
Astatula ES	876	733	876	84%	685	876	78%	760	876	87%	766	876	87%	778	876	89%	780	876	89%
Elementary Total	876	733	876	84%	685	876	78%	760	876	87%	766	876	87%	778	876	89%	780	876	89%

Capital and Non Capital Considerations

High School – See CSA #6

Tavares MS – No change

Astatula ES - Permanent FISH = 701; Long term relief will be provided through the opening of new schools in the area; monitor enrollment

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Oak Park MS	724	620	724	86%	561	724	77%	590	724	81%	594	724	82%	610	724	84%	622	724	86%
Middle Total	724	620	724	86%	561	724	77%	590	724	81%	594	724	82%	610	724	84%	622	724	86%
Leesburg ES	933	940	933	101%	944	933	101%	955	933	102%	946	933	101%	870	933	93%	883	933	95%
Leesburg ES (N)		0			0			0	0		0	0		0	0		0	0	
Elementary Total	933	940	933	101%	944	933	101%	955	933	102%	946	933	101%	870	933	93%	883	933	95%

Capital and Non Capital Considerations

High School – See CSA #9

Oak Park MS – Permanent FISH capacity 598

Leesburg ES - Permanent FISH = 746; Provide some relief with the opening of a new schools in the area beyond 2014; Adjust boundaries among Leesburg area schools to balance enrollment and support School Concurrency beginning 2012

New Leesburg ES (N) – Monitor development in South Leesburg; Working with the City of Leesburg to determine the timing for this new school

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %
Comm. Coll. HS Partnership (DDD)		0			0			0			0			0			0		
East Ridge HS	2252	2957	2252	131%	2985	2252	133%	3109	2252	138%	2078	2252	92%	2000	2252	89%	2080	2252	92%
New High School (BBB)		0			0			0			1119	2457	46%	1333	2457	54%	1386	2457	56%
High Total	2252	2957	2252	131%	2985	2252	133%	3109	2252	138%	3197	4709	68%	3333	4709	71%	3466	4709	74%
Clermont MS	1005	690	1005	69%	700	1005	70%	685	1005	68%	718	1005	71%	728	1005	72%	753	1005	75%
East Ridge MS (DD)	1593	1017	1593	64%	1084	1274	85%	1136	1274	89%	1170	1274	92%	1193	1274	94%	1211	1274	95%
Middle Total	2598	1707	2598	66%	1784	2279	78%	1821	2279	80%	1888	2279	83%	1921	2279	84%	1964	2279	86%
Clermont ES	566	681	566	120%	701	566	124%	668	566	118%	671	566	119%	665	566	117%	705	566	124%
Cypress Ridge	690	614	690	89%	606	690	88%	614	690	89%	611	690	89%	609	690	88%	622	690	90%
Grassy Lake ES (H)	1175	1004	1175	85%	1012	1175	86%	1084	1175	92%	1117	1175	95%	1197	1175	102%	1235	1175	105%
Lost Lake ES	1112	1103	1112	99%	1162	1112	104%	1125	1112	101%	1133	1112	102%	1124	1112	101%	1153	1112	104%
Minneola ES	1425	1037	1425	73%	1028	1445	71%	1041	1445	72%	1025	1445	71%	1071	1445	74%	1107	1445	77%
South Lake ES (L)		0			0			0			0			0			0		
Elementary Total	4968	4439	4968	89%	4509	4988	90%	4532	4988	91%	4557	4988	91%	4666	4988	94%	4822	5297	91%

Capital and Non Capital Considerations

Community College HS Partnership (DDD) – Delayed beyond 2014

East Ridge HS – Provide relief with the opening of the New High School "BBB" in 2011

New High School (BBB)– Open 2011; Capacity 1966; Provide relief to East Ridge and South Lake High Schools

Clermont MS – No change

East Ridge MS – Opened 2008; Capacity 1274; Core 1274

Clermont ES – Addition 2013 (cafeteria and classrooms); Capacity 700/Core 875

Cypress Ridge ES – Concurrency Capacity increased due to requirements of SB 360; see page 7-4

Grassy Lake ES – No change

Lost Lake ES – No change

Minneola Charter ES – No change

Lost Lake Relief ES (L) – Open beyond 2014; FISH Capacity 940

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %	Enroll	Cap	Util %
High School (BBB) (shared)		0			0			0			432	600	72%	439	600	73%	452	600	75%
South Lake HS	2412	2142	2412	89%	2154	2278	95%	2129	2278	93%	1730	2278	76%	1756	2278	77%	1807	2278	79%
High Total	2412	2142	2412	89%	2154	2278	95%	2129	2278	93%	2162	2878	75%	2195	2878	76%	2259	2878	78%
Cecil E. Gray MS	938	1022	938	109%	943	938	101%	1053	1274	83%	1046	1274	82%	1064	1274	84%	1100	1274	86%
Groveland MS (EE)		0			0			0			0			0			0		
Middle Total	938	1022	938	109%	943	938	101%	1053	1274	83%	1046	1274	82%	1064	1274	84%	1100	1274	86%
Groveland ES	902	824	902	91%	810	902	90%	846	902	94%	879	902	97%	912	902	101%	941	902	104%
Groveland ES (Q)		0			0			0			0			0			0		
Mascotte Charter ES (K)	1175	813	1175	69%	819	1175	70%	848	1175	72%	877	1175	75%	902	1175	77%	928	1175	79%
Mascotte ES (M)		0			0			0			0			0			0		
Elementary Total	2077	1637	2077	79%	1629	2077	78%	1694	2077	82%	1756	2077	85%	1814	2077	87%	1869	2077	90%

Capital and Non Capital Considerations

South Lake HS – Enrollment relief with opening of High School BBB in 2011

Cecil Gray MS – Reconstruction and expansion open 2010; capacity of 1274/Core 1274

New Groveland Area MS (EE) – Open beyond 2014; Capacity 1274

Groveland ES – Provide relief with the opening of a new school beyond 2014

New Groveland ES (Q) – Open beyond 2014; Capacity 940

Mascotte ES Conversion Charter – Capacity 940/Core 1175

New Mascotte Area ES (M) – Monitor development in the area; Opening beyond 2014; Capacity 940

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Windy Hill MS	1136	1109	1136	98%	1100	1136	97%	1125	1136	99%	1173	1136	103%	1218	1136	107%	1248	1136	110%
Middle Total	1136	1109	1136	98%	1100	1136	97%	1125	1136	99%	1173	1136	103%	1218	1136	107%	1248	1136	110%
Sawgrass Bay ES (I)	1175	1040	1175	89%	1058	1175	90%	1102	1175	94%	1163	1175	99%	1263	1175	107%	1330	1175	113%
Elementary Total	1175	1040	1175	89%	1058	1175	90%	1102	1175	94%	1163	1175	99%	1263	1175	107%	1330	1175	113%

Capital and Non Capital Considerations

High School – See CSA #12

Windy Hill MS – Permanent FISH = 909; Classroom addition in 2014 to support School Concurrency

Sawgrass Bay ES – Classroom addition in 2014 to support School Concurrency

Concurrency Analysis

School	Concurrency Capacity	Prior			40th Day			Projected											
		2008 / 2009			2009 / 2010			2010 / 2011			2011 / 2012			2012 / 2013			2013 / 2014		
		Enroll	Cap	Util %															
Pine Ridge ES	986	805	986	82%	784	986	80%	767	986	78%	774	986	78%	786	986	80%	814	986	83%
Elementary Total	986	805	986	82%	784	986	80%	767	986	78%	774	986	78%	786	986	80%	814	986	83%

Capital and Non Capital Considerations

High School and Middle School – See CSA #12 and #13

Pine Ridge ES - Permanent FISH = 898



**Review of Budget for 2010-2011
District Facilities Work Program
FY 2011-2015**

**September 27, 2010
Regular School Board Meeting
Lake County Schools**

Summary of Proposed Changes Major Capital Projects From FY 2010-2014 to FY 2011-2015

Approved in FY 2010	Proposed Changes in FY 2011
Eustis Heights ES Ren/Addition	Accelerate planning funds to FY 2011
Grassy Lake ES Addition - Unfunded	Accelerate to FY 2011
Sawgrass Bay ES Addition - FY 2014	Accelerate to FY 2011
Classroom Additions - FY 2013 & FY 2014	Deleted
"L" Elementary - Lost Lake relief	Delayed; planning funds only
"N" Elementary - Leesburg relief	Delayed; planning funds only
"O" Elementary - Villages relief	Delayed; planning funds only
"P" Elementary - Treadway/Tavares relief	Delayed; planning funds only
"Q" Elementary - Groveland relief	Delayed; planning funds only
<hr/>	
Mt Dora MS Addition - FY 2012 & 2013	Accelerate one year to FY 2011 & 2012
<hr/>	
Eustis HS - FY 2014 planning funds	Eustis HS/Curtright - FY 2011 planning funds
<hr/>	
<hr/>	

Summary of Capital Improvement Program

Project	Total	Prior to 2011	FY 2011 - FY 2015	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015
Renovations/Additions/Replacements								
Clermont ES Cafeteria/Addition	8,230,196	0	8,230,196		1,534,562	6,195,634	500,000	
Eustis ES	100,000	100,000						
Eustis Heights Ren/Addition	9,216,114	0	9,216,114	1,900,000		6,616,114	700,000	
Eustis HS/Curtright	1,000,000	0	1,000,000	1,000,000				
Grassy Lake ES Addition	4,425,620		4,425,620	4,425,620				
Mt Dora MS Addition	8,020,592	0	8,020,592	1,419,282	6,601,310			
Sawgrass Bay ES Addition	4,425,620	0	4,425,620	4,425,620				
Treadway Addition	7,546,612	0	7,546,612	1,397,960	6,148,652			
Umatilla HS Addition - 9th Grade Center	7,436,939	0	7,436,939			691,240	6,745,699	
Umatilla MS Ren/Addition	5,786,951	0	5,786,951			5,036,951	750,000	
Windy Hill Addition	7,580,000	0	7,580,000				3,344,862	4,235,138
Subtotal Renovations/Additions/Replacements	63,768,644		63,668,644	14,568,482	14,284,524	18,539,939	12,040,561	4,235,138
Site Acquisition								
Land Acquisition	8,000,000	6,000,000	2,000,000			200,000	300,000	1,500,000
Subtotal Site Acquisition	8,000,000		2,000,000	0	0	200,000	300,000	1,500,000
New Schools								
High School (BBB)	73,321,397	72,475,546	845,851	845,851				
Leesburg Relief ES (N)	810,750	0	810,750					810,750
Lost Lake Relief ES (L)	810,750	0	810,750					810,750
New Groveland Relief ES (Q)	810,743	0	810,743					810,743
Treadway Relief ES (P)	810,750	0	810,750					810,750
Villages Relief ES (O)	810,750	0	810,750					810,750
Subtotal New Schools	77,375,140		4,899,594	845,851	0	0	0	4,053,743
Subtotal	149,143,784		70,568,238	15,414,333	14,284,524	18,739,939	12,340,561	9,788,881

Project	Total	Prior to 2011	FY 2011 - FY 2015	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015
Portables								
Portable Lease (Transfer to General Fund)	6,259,000	0	6,259,000	1,600,000	1,259,000	1,000,000	1,200,000	1,200,000
Subtotal Portables	6,259,000		6,259,000	1,600,000	1,259,000	1,000,000	1,200,000	1,200,000
Maintenance and Equipment								
Capital School Equipment	400,000	0	400,000	100,000	100,000		100,000	100,000
Computer Technology Program (Transfer to General Fund)	14,939,000	0	14,939,000	3,000,000	3,000,000	2,939,000	3,000,000	3,000,000
Environmental Projects	1,075,000	0	1,075,000	175,000	200,000	225,000	225,000	250,000
Maintenance Projects	12,407,144	0	12,407,144	4,161,925	906,608	2,210,297	2,432,389	2,695,925
School Buses	3,954,354	0	3,954,354	1,250,000			1,200,000	1,504,354
Subtotal Maintenance and Equipment	32,775,498		32,775,498	8,686,925	4,206,608	5,374,297	6,957,389	7,550,279
Debt Service, Operations and Ancillary Facilities								
Debt Service	159,028,000	0	159,028,000	30,772,000	31,272,000	31,792,000	32,346,500	32,845,500
Maintenance (Transfer to General Fund)	7,950,000	0	7,950,000	3,000,000	750,000	750,000	850,000	2,600,000
Subtotal Debt Service, Operations and Ancillary Facilities	166,978,000		166,978,000	33,772,000	32,022,000	32,542,000	33,196,500	35,445,500
Subtotal	206,012,498		206,012,498	44,058,925	37,487,608	38,916,297	41,353,889	44,195,779
Total Projects	355,156,282		276,580,736	59,473,258	51,772,132	57,656,236	53,694,450	53,984,660

Summary of Estimated Revenue

Estimated Revenue	Five Year Total	FY 2010 2011	FY 2011 2012	FY 2012 2013	FY 2013 2014	FY 2014 2015
Local Sources						
Property Tax Levy	143,702,842	27,099,779	26,476,484	27,906,214	29,971,274	32,249,091
Impact Fees	19,800,000	3,000,000	3,600,000	4,000,000	4,400,000	4,800,000
Sales Tax	44,000,000	8,400,000	8,600,000	8,800,000	9,000,000	9,200,000
Other Misc.	1,250,000	300,000	275,000	250,000	225,000	200,000
Carry-Over: Other	44,384,750	44,384,750				
Subtotal Local Sources	253,137,592	83,184,529	38,951,484	40,956,214	43,596,274	46,449,091
State						
CO & DS	850,020	170,004	170,004	170,004	170,004	170,004
PECO Bonds - Const.	12,429,388			263,965	7,495,783	4,669,640
PECO Bonds - Maint.	9,829,636	1,584,417	906,608	2,210,297	2,432,389	2,695,925
COBI/SBE Bonds	335,000	335,000				
Subtotal State	23,444,044	2,089,421	1,076,612	2,644,266	10,098,176	7,535,569
Proposed COPS/Bond Proceeds						
COP Proceeds (Available)						
Subtotal Proposed COPS/Bond Proceeds	0	0	0	0	0	0
Total	276,581,636	85,273,950	40,028,096	43,600,480	53,694,450	53,984,660

Unfunded Capital Projects

September 27, 2010

Project Name	Status	Estimated Capital Expenditures
Clermont MS Ren/Addition	Unfunded	\$23,733,976
"EE" MS Groveland area	Unfunded	\$45,377,956
Eustis HS Addition	Partially Unfunded	\$3,218,470
"L" ES	Partially Unfunded	\$29,081,713
Mascotte ES Addition	Unfunded	\$4,425,620
"M" ES	Unfunded	\$29,721,388
"N" ES	Partially Unfunded	\$29,081,713
Oak Park MS Ren/Addition	Unfunded	\$11,542,500
"O" ES (partial size)	Partially Unfunded	\$29,081,713
"P" ES (partial size)	Partially Unfunded	\$26,191,823
"Q" ES	Partially Unfunded	\$29,081,713
Round Lake Charter ES	Unfunded	\$4,050,000
Seminole Springs ES	Unfunded	\$9,384,094
Spring Creek Charter ES	Unfunded	\$4,050,000
Vo-Tech Center (Eustis)	Unfunded	\$1,179,895
Vo-Tech Center (Public Safety)	Unfunded	\$1,178,645
Total		\$280,381,216