

# Developer Information Workshop

## CEAs, Concurrency, & Impact Fees

OCPS Facilities Planning

May 2019



**Orange County  
Public Schools**

# Our Team

- **Facilities Planning**

- Angela Abrusci, Planning Tech
- Jamie Boerger, AICP, LEED AP, Administrator
- Vitonni Jenkins, Senior Specialist
- Julie Salvo, AICP, Senior Administrator

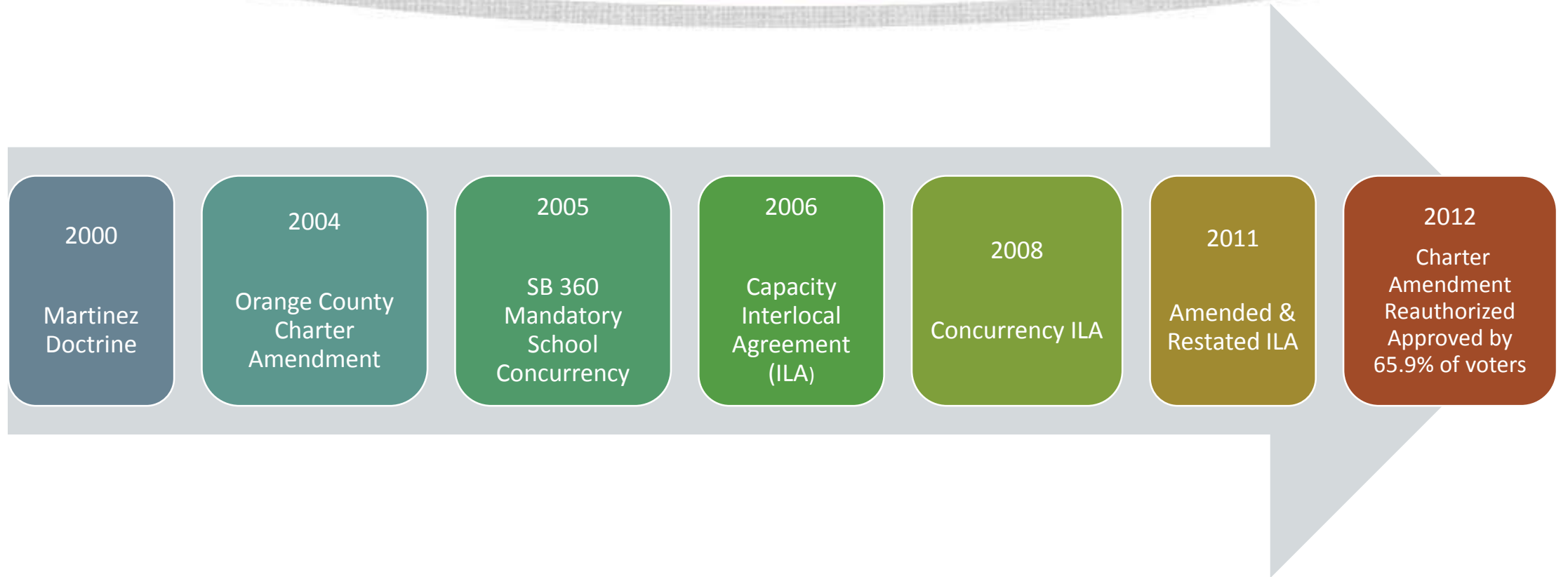
- **Legal Services - Facilities**

- Laura Kelly, Attorney – Planning & Real Estate

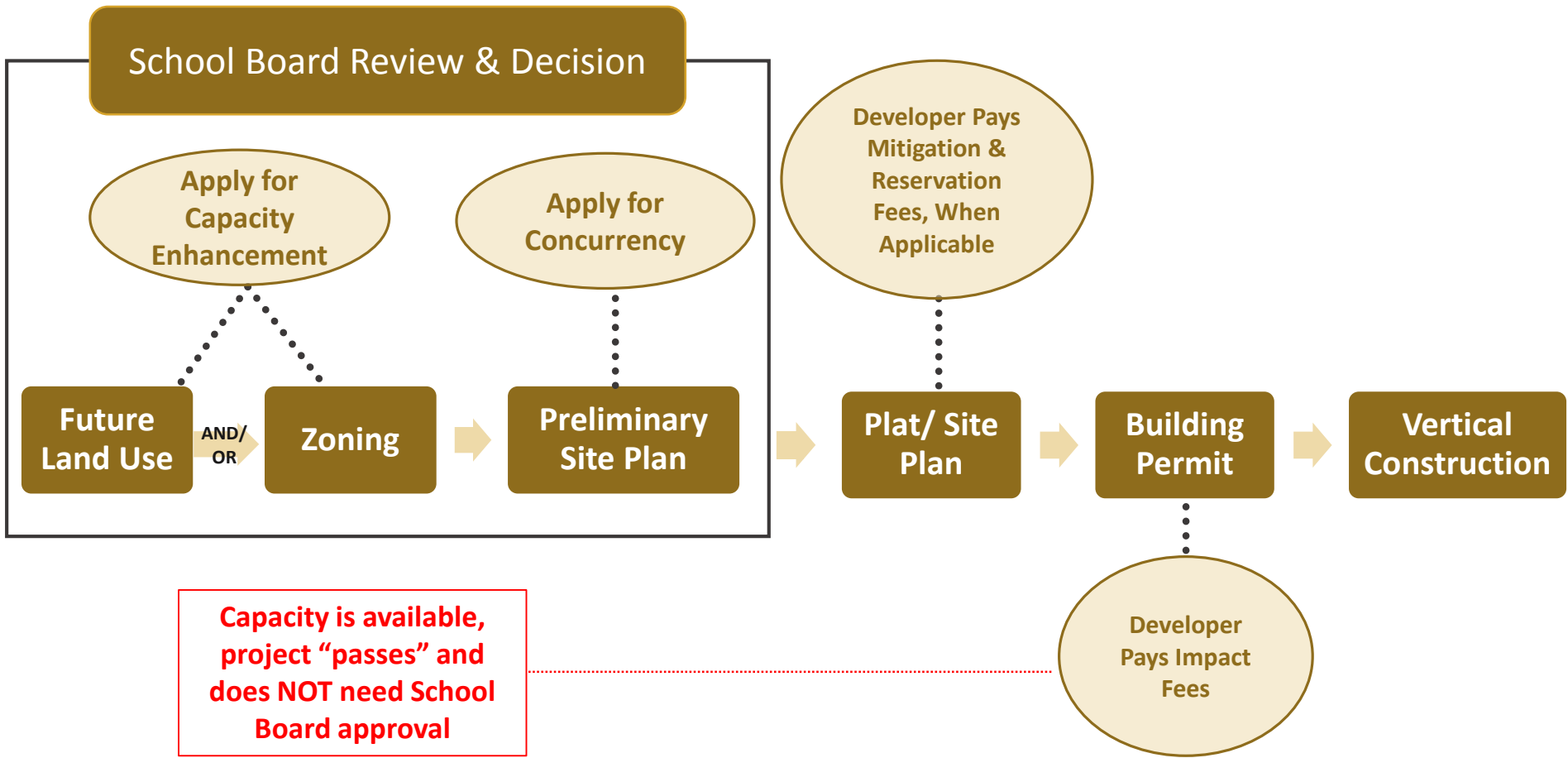
# OCPS Facilities Planning: What We Do

- Local Government Liaison/Resource
  - Julie (Orange County)
  - Jamie (Towns & Cities)
- Residential Development Monitoring → Development information provided to OCPS demographer
  - Participate at TRG/DRC, MPB/P&Z, Public Hearings
  - Conditions of Approvals
  - Collect Mitigation and Prepaid Impact Fees
  - Sign-off on Residential Plats, Letters of Authorization, Capacity Encumbrance & Reservation
- Informal Capacity Inquiries and Formal Capacity Determinations
  - Capacity Encumbrance Letters (CEL), Capacity Enhancement Agreements (CEA), Concurrency Mitigation Agreement (CMA), and Amendments and Extensions
- Entitlements/Approvals for New and Renovated Schools
- Impact Fees

# Where We Are Today



# Residential Development Process



# Dual Review Process

	Step 1: Capacity Enhancement	Step 2: Concurrency
What?	Changing of Land Use Entitlements	Prior to Vertical Construction
	Land Rezoning & Future Land Use Map Amendments	Site Plan or Pre-plat (All Post-2008 Residential Projects)
	Covers “New” Units	All Units in Project
When?	Early in Development Process	Later in Development Process
How?	Local, Charter Amendment, ILA	Optional/ State Statute, ILA
Timing?	Long Range	Short Range
	Used for Planning Purposes, Incorporated into Background Growth, Does Not Automatically Encumber or Reserve Capacity	Requires a Capacity Encumbrance and Reservation

# Enrollment History

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total, 2013-2018
Total Enrollment	189,347	194,275	199,817	203,448	207,253	211,685	
# Change	+3,665	+4,928	+5,542	+3,631	+3,805	+4,430	+26,001
<i>12% of district's total enrollment added since 2013</i>							

\*Projection methodology uses cohort survival, birth data, and growth data

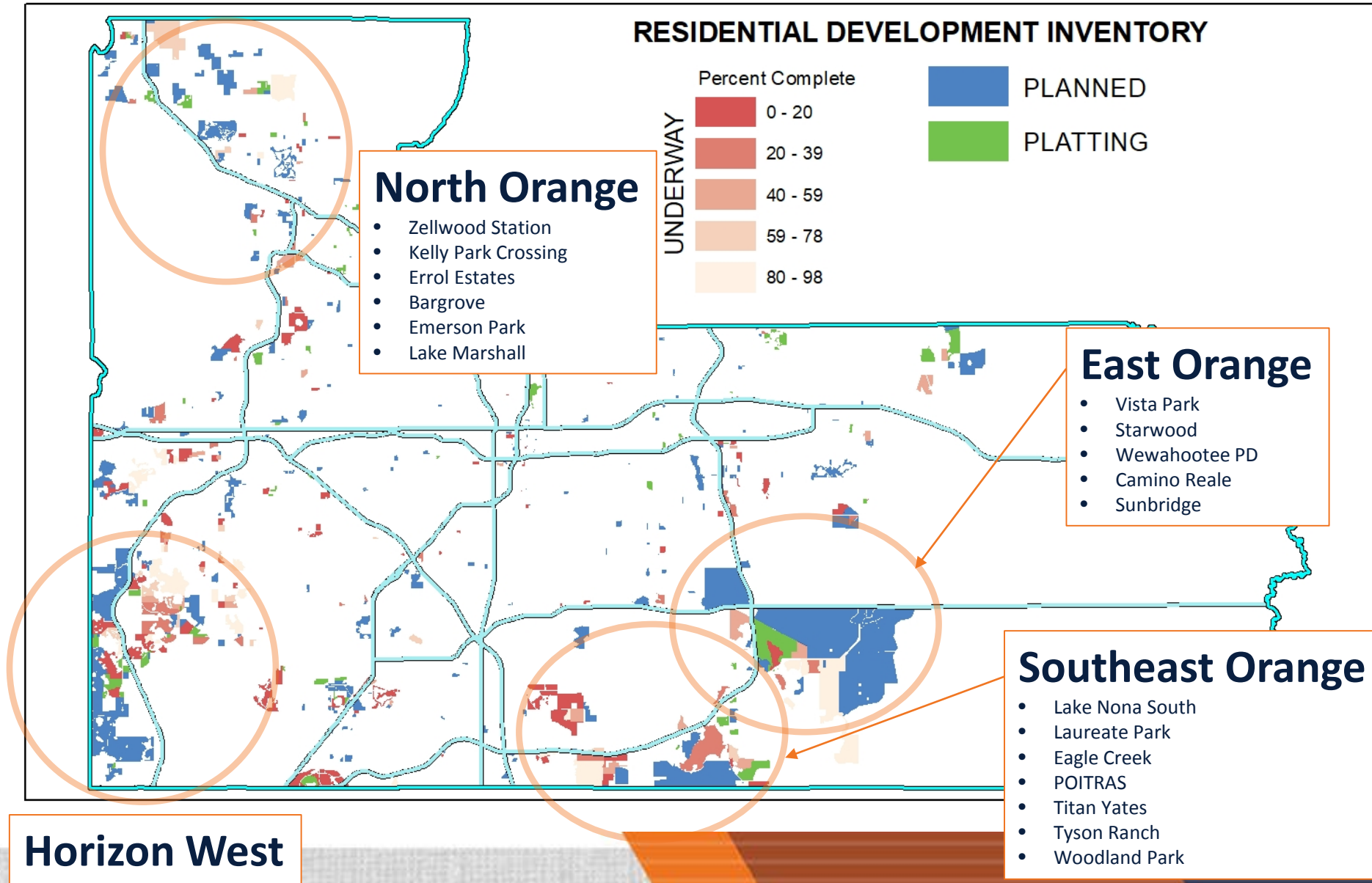
# Live Births by Attendance Zone

Census 2010 Data and 2010 through 2016 Live Births (Department of Vital Statistics, DOH) by 2018-19 Attendance Zone Approved as of 11/30/17

Location Id	School	Type	2016 Births	2015 Births	2014 Births	2013 Births	2012 Births	2011 Births	2010 Births	Census 2010 (Age)																	
										1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
<b>Elementary Schools</b>																											
1851	133-K8-N-6	K8	152	149	145	130	125	112	123	118	121	121	124	127	119	111	109	110	117	105	103	111	119	112	130	129	252
0221	205-K8-SW-6	K8	224	201	226	195	178	169	191	153	175	161	147	146	137	113	121	126	131	119	117	112	120	112	128	139	128
1401	Aloma	ES	153	136	137	124	120	98	115	106	111	96	102	93	111	95	106	91	98	102	118	116	94	130	138	144	284
0321	Andover	ES	137	146	141	140	112	126	108	103	108	106	115	104	108	108	106	102	116	122	116	102	103	102	116	92	103
1282	Apopka	ES	158	130	190	138	135	153	147	166	195	172	152	132	156	131	142	113	147	121	125	126	124	124	136	134	134
0981	Arbor Ridge	K8	75	85	74	78	67	85	86	86	82	78	86	86	93	67	80	76	72	83	98	104	111	122	102	126	139
0531	Audubon Park	ES	159	178	155	169	196	163	169	149	160	169	140	137	159	140	131	103	132	128	111	99	95	123	106	82	111
0222	Avalon	ES	82	92	70	99	96	106	110	82	87	92	92	96	92	95	79	67	85	85	68	86	82	70	70	71	67
0611	Azalea Park	ES	113	114	112	96	114	93	96	134	108	99	91	106	110	87	117	114	107	112	123	101	121	113	119	102	116
1392	Bay Lake	ES	101	114	95	73	72	73	78	66	65	56	78	68	58	59	48	65	60	43	52	47	42	40	40	43	36
1071	Bay Meadows	ES	77	74	55	61	57	70	67	56	64	78	70	58	74	71	97	85	95	126	111	118	115	134	132	135	81
0631	Blankner	K8	83	83	96	68	74	92	80	56	68	73	84	98	99	84	83	93	108	87	99	78	76	84	70	74	63
0871	Bonneville	ES	92	111	107	107	109	113	97	101	90	109	106	94	107	102	96	124	89	97	117	107	116	104	119	124	144
0751	Brookshire	ES	110	122	102	83	74	79	71	76	90	97	91	101	85	106	98	94	109	101	98	106	106	128	110	125	196
0217	Camelot	ES	96	97	82	84	92	111	98	95	103	99	97	95	101	97	101	112	99	114	100	105	109	125	106	106	127
1612	Castle Creek	ES	130	143	130	122	147	151	129	140	145	150	149	138	163	158	167	153	152	153	155	157	170	164	165	161	179
0701	Catalina	ES	163	169	147	145	162	175	171	161	164	154	122	114	117	92	125	108	104	97	94	92	112	133	138	148	211
0711	Cheney	ES	118	111	112	95	101	105	117	100	79	80	107	81	85	92	101	99	96	86	88	99	110	111	98	114	117
0831	Chickasaw	ES	114	125	146	115	139	135	126	142	148	151	141	131	125	117	128	138	130	131	122	132	150	131	130	140	156
0216	Citrus	ES	112	96	77	93	97	97	89	94	111	114	124	124	140	107	139	164	153	152	132	146	150	149	158	160	129
0991	Clay Springs	ES	110	113	118	103	103	103	113	126	118	117	125	113	162	143	130	115	151	126	132	128	137	114	140	141	118
1451	Columbia	ES	71	102	83	91	95	75	79	82	98	101	94	89	105	85	102	99	99	84	102	85	105	104	106	113	87
0551	Conway	ES	137	147	139	72	75	77	81	136	111	112	88	102	88	81	62	80	76	84	71	75	91	94	85	100	121
0741	Cypress Park	ES	59	51	36	42	58	41	54	49	42	59	50	55	41	60	47	43	53	52	60	65	56	57	54	62	47
0156	Cypress Springs	ES	174	108	147	127	143	124	121	118	120	121	120	139	129	134	123	133	120	132	130	147	144	143	138	156	124
1601	Deerwood	ES	61	72	53	60	69	59	70	63	69	80	83	93	77	97	95	108	106	103	114	100	93	103	99	107	93



# RESIDENTIAL DEVELOPMENT INVENTORY

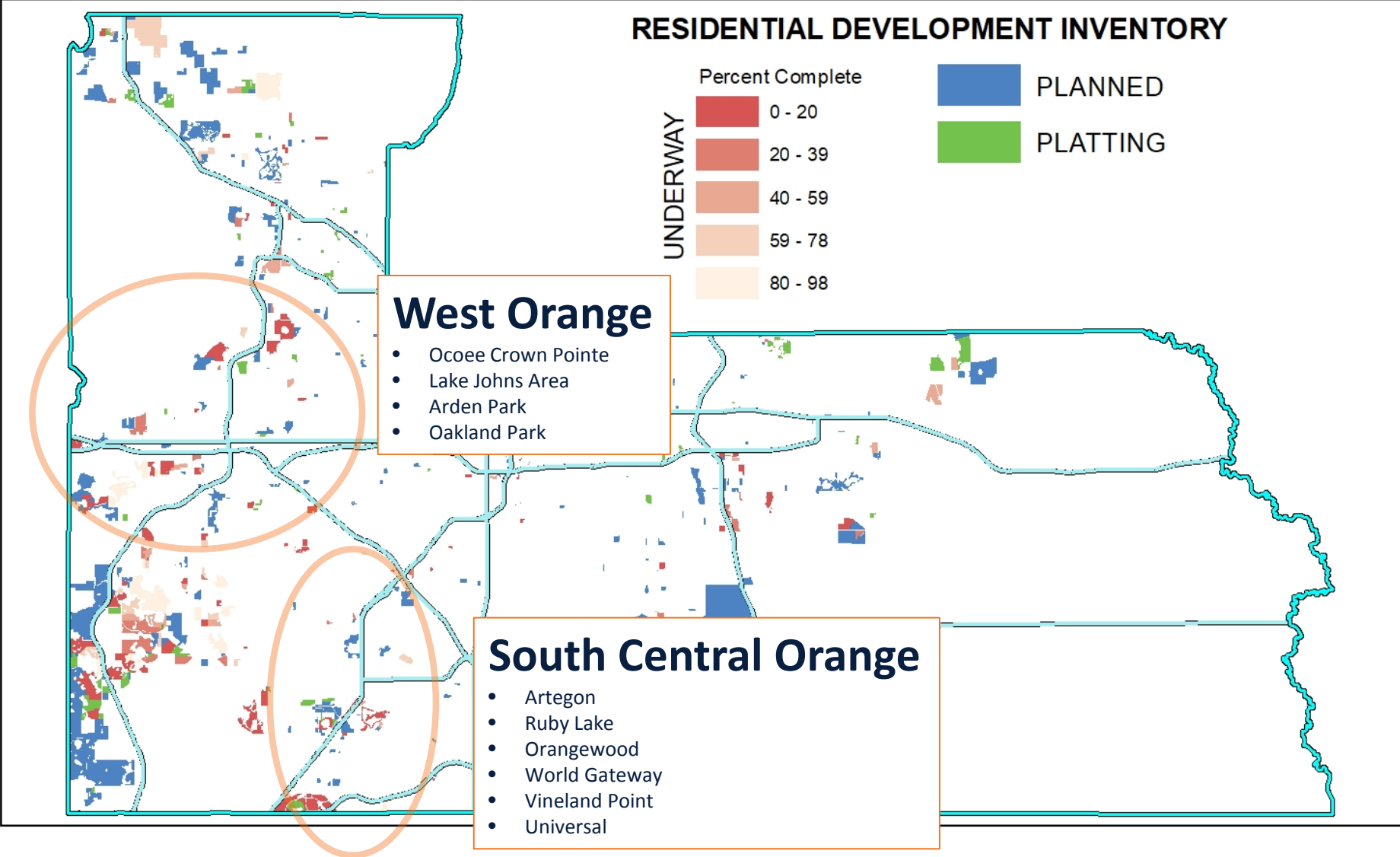


- ### North Orange
- Zellwood Station
  - Kelly Park Crossing
  - Errol Estates
  - Bargrove
  - Emerson Park
  - Lake Marshall

- ### East Orange
- Vista Park
  - Starwood
  - Wewahootee PD
  - Camino Reale
  - Sunbridge

- ### Southeast Orange
- Lake Nona South
  - Laureate Park
  - Eagle Creek
  - POITRAS
  - Titan Yates
  - Tyson Ranch
  - Woodland Park

**Horizon West**



# Dual Review Process

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How?	Local, Charter Amendment, ILA	Optional/ State Statute, ILA
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# Capacity Enhancement Agreements (CEA)

- **Formal School Capacity Determination** needed when applying to increase residential density through a Future Land Use Map (FLUM) amendment or rezoning of property

**AND**

- **CEA is Required** when school capacity is not available at any school level, and is not available within the first three (3) years of the Capital Outlay Plan
- CEAs require payment of a Capital Contribution to mitigate impacts to affected schools
  - *CEAs must be executed before local government can approve a FLUM amendment or rezoning*

# Concurrency Mitigation Agreement (CMA)

- ***Formal School Capacity Determination*** needed when applying for a residential site plan or final subdivision approval (or functional equivalent) to obtain a ***Capacity Encumbrance Letter (CEL)***

**AND**

- ***CMA Required*** when capacity is not available at any Concurrency Service Area (CSA) level or within the first three (3) years of the Capital Outlay Plan
- CMAs require payment of Proportionate Share to mitigate impacts to affected CSAs
- *Projects that possess a CEA may be able to bypass the CMA if the Proportionate Share Mitigation amount is less than or equal to the Capital Contribution for each school level*



Most Residential Projects Will Obtain Two (2)  
Formal School Capacity Determinations

---and---

Some Residential Projects Will Need a  
CEA and/or a CMA

# Step #1: Formal Capacity Determination Application Requirements



- Online application - <http://formalapplication.ocps.net>
- \$600 Fee
- Agent authorization on OCPS-form
- Tax map(s) depicting project location, parcels, and parcel IDs
- Copy of plan submittal to local government
- Proposed Development Profile –Provided by local government
  - A development application must be underway with the local government before an application is submitted to OCPS
  - A project case # must be provided

# Step #2: Mitigation Agreement/ Notice to Proceed Requirements



- Title Commitment or Ownership & Encumbrance Report (<90 days old)
- Certified legal survey
- GIS shape file matching legal description
- Phasing schedule, if applicable, with estimated start/end dates of each phase



# Project Demonstration

1. Applicant has requested to rezone property from A-1 to PD in Oakland to allow for **180 single family** residential dwelling units
2. Town determines property is vested for **2 single family** residential dwelling units
3. OCPS conducts a Formal School Capacity Determination on 178 single family units
  - Project is zoned for Independence ES, Bridgewater MS, and Windermere HS



**Applicant submits request for Formal School Capacity Determination**



**DEPARTMENT OF FACILITIES PLANNING  
APPLICATION FOR DETERMINATION OF SCHOOL CAPACITY  
AND SCHOOL CONCURRENCY  
APPLICATION FEE: \$600.00**

TEL: 407-317-3974 / FAX: 407-317-3263 / WEBSITE: HTTP://PLANNING.OCPS.NET

Red \* denotes required field.

PROJECT NAME. \*

THE CROSSINGS AT GOPHER SKINK PRESERVE

APPLICANT INFORMATION

Name: \* JULIE SALVO  
 Company: OCPS  
 Address: \* 6501 MAGIC WAY  
 City: \* ORLANDO State: \* FL Zip: \* 32809  
 Phone: \* ( 407 ) 317 - 3700 ext.: 2022139  
 Email: \* JULIE.SALVO@OCPS.NET

PARCEL ID #. \*

Section	Township	Range	Subdivision	Block	Lot
04	24	28	0000	00	555
00	00	00	0000	00	000
00	00	00	0000	00	000
00	00	00	0000	00	000
00	00	00	0000	00	000

Attachments. \*

Required ([Click for more instructions](#))

1. Local Government form with signature
2. Certified legal survey
3. Preliminary Plat/Site, Master or Land Use Plan
4. Certificate of Title or Ownership & Encumbrance Report (issued within 90 days)
5. Geographic Information System (GIS) shape file
6. Tax map depicting the project site
7. Agent Authorization Form (if Applicant not property owner)

File: Choose File No file chosen Attach File

Short Description:

File Name	File Type	Description
ZCARMA_CSA_TALLY_PDF.PDF	APPLI...	CERTIFICATE OF TITLE

Delete Attachment

ACREAGE

45.000 acres: \*

**Applicant submits request for Formal School Capacity Determination**

ACREAGE

acres: \*

JURISDICTION (City or County)

\*

Property Owner

Same as Applicant

Name:

Email:

Notes

Application Type

**Please check the applicable boxes below. Concurrency can only be selected by itself.**

Future Land Use [FLU] Map Amendment (CEP)

Rezoning (CEP)

Site Plan / Preliminary Plat / Development Plan (Concurrency)

Applicant's Signature: \*



**Please check the applicable boxes below. Concurrency can only be selected by itself.**

Future Land Use [FLU] Map Amendment (CEP)

Rezoning (CEP)


Site Plan / Preliminary Plat / Development Plan (Concurrency)

Form Application.

**Applicant submits request for Formal School Capacity Determination**

[Back to Form](#)

Your application ID is **CEA-OAK-18** making payment or referencing your appli

Click the print button below to print a copy  
 [Print Application](#)

Please click the below link to make your o  
[Make](#)

If the payment button does not work, then copy a  
<https://www.schoolpay.com/pay/for/Forma>



**Department of Facilities Planning**  
**APPLICATION FOR DETERMINATION OF SCHOOL CAPACITY**  
**AND SCHOOL CONCURRENCY**  
**APPLICATION FEE: \$600.00**

Application ID : CEA-OAK-18-001

PROJECT NAME	THE CROSSINGS AT GOPHER SKINK PRESERVE
APPLICANT INFORMATION	Name: <u>JULIE SALVO</u> Company Name: <u>OCPS</u> Address: <u>6501 MAGIC WAY</u> <u>ORLANDO</u> <u>FL</u> <u>32809</u> Phone # : <u>(407) 317-3700</u> Ext. <u>2,022,139</u> Email: <u>JULIE.SALVO@OCPS.NET</u>
PARCEL ID # (S)	04-24-28-0000-00-555
ACREAGE	<u>45</u> acres
JURISDICTION (City or County)	OAKLAND
PROPERTY OWNER INFORMATION	Name <u>JULIE SALVO</u> Email <u>JULIE.SALVO@OCPS.NET</u>
NOTES	
APPLICATION TYPE	Future Land Use [FLU] Map Amendment (CEP), and Rezoning (CEP)

JULIE SALVO  
 Applicant's Signature

If the Applicant is not the property owner, an OCPS Agent Authorization Form must be completed by the property owner and must be submitted with the Application.

### Formal Application Fee

APPLICANT STATEMENT:

I, the Applicant, understand that this payment is for the below application ID related to my Formal Application. The Formal Application contained herein is provided as a convenience to the public and reflects the capacity of the impacted schools on the day and time the review is conducted; this is a preliminary non-binding review of my proposed project and is not a determination of Capacity or Concurrency at the impacted schools identified in the review.

Payment to: OCPS Planning

#### Additional Information Requested

Project Name \*

The Crossings at Gopher Skink Reserve

Application ID \*

CEA-OAK-18-001

Please click the below link to make your online payment!

[Make a Payment](#)



If the payment button does not work, then copy and paste the URL below into a new browser window.

<https://www.schoolpay.com/pay/for/Formal-Application-Fee/Id62Z>



Proposed Development Profile

TO BE COMPLETED BY LOCAL GOVERNMENT STAFF (Check All That Apply)

<b>PROJECT NAME</b>	The Crossings at Gopher Skink Reserve
<input checked="" type="checkbox"/> Future Land Use [FLU] Map Amendment (Capacity Enhancement)	Existing FLU: <u>  R  </u> Max. Density permitted: <u>  1/10  </u> du/ac Proposed FLU: <u>  MDR  </u> Max. Density permitted: <u>  4  </u> du/ac Type: <input checked="" type="checkbox"/> SF <u>  180  </u> <input type="checkbox"/> MF <u>      </u> <input type="checkbox"/> TH <u>      </u> <input type="checkbox"/> MH <u>      </u> Vested/Unvested: <u>  2  </u> / <u>  178  </u>
<input checked="" type="checkbox"/> Rezoning (Capacity Enhancement)	Existing Zoning: <u>  R-1AA  </u> Max. Density permitted: <u>      </u> du/ac Proposed Zoning: <u>  PD  </u> Max. Density permitted: <u>      </u> du/ac Type: <input checked="" type="checkbox"/> SF <u>  180  </u> <input type="checkbox"/> MF <u>      </u> <input type="checkbox"/> TH <u>      </u> <input type="checkbox"/> MH <u>      </u> Vested/Unvested: <u>  2  </u> / <u>  178  </u>
<input type="checkbox"/> Site Plan/ Preliminary Plat/ Development Plan (Concurrency) <b>CITY APPLICANTS ONLY</b>	Total Unit Type: <input type="checkbox"/> SF <u>      </u> <input type="checkbox"/> MF <u>      </u> <input type="checkbox"/> TH <u>      </u> <input type="checkbox"/> MH <u>      </u> <small>If school concurrency vested rights apply, please submit documentation to <a href="http://planning.ocps.net">planning.ocps.net</a></small>
Local Government Information Town of Oakland <input type="button" value="v"/>	Case #: <u>  2018-1-R-1-1  </u> Planner Assigned: <u>  Leslie Knope, AICP  </u> Phone #( <u>      </u> ) <u>      </u> Email: <u>      </u>
Target date and type of Local Government public hearing	<input checked="" type="checkbox"/> Comp Plan <u>  November 1, 2018  </u> <input checked="" type="checkbox"/> Rezoning <u>  November 1, 2018  </u> <input type="checkbox"/> Plat/Site Plan Approval <u>      </u>

**FORM MUST BE SIGNED BY LOCAL GOVERNMENT PLANNER**

Local Government Representative: \_\_\_\_\_ Date: \_\_\_\_\_

Applicant submits completed/signed Development Profile from local government

# Local Government Role

- Local Government signature **required** on all Formal Capacity Determination applications to:
  - Establish number of vested units (Capacity Enhancement)
  - Provide project info (e.g. project #, hearing dates, case #, etc.) to ensure accuracy and timing of CEA
  - Verify the land use action being requested (zoning, FLU, PSP, etc.)
- Vesting are determined by local government
  - OCPS does not make vesting determinations
  - OCPS does not accept vesting opinions from Applicants
  - OCPS may request documentation from the Applicant and local government to support vesting claims
- Concurrency exemptions are contained in the ILA

# Capacity Analysis, Review, and Monitoring Application (CARMA)

- In-house tool used since 2008 to assess capacity conditions, and calculate mitigation and capital contribution payments
- Tracks concurrency encumbrance and reservation
- CARMA 2.0 was implemented in October 2016
  - Online applications
  - Option for online payments of application fees



Concurrency Analysis & Review Monitoring Application (CARMA) v2.0

CARMA User

General

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Informal Reports

[Informal Application](#)  
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[Capacity Determination](#)

Formal Reports CEA

[Formal Application](#)  
[CEA Determination](#)  
[CEA Mitigation](#)  
[CEA SDRC](#)

Formal Reports CMA

[Formal Application](#)  
[Concurrency Determination](#)  
[Concurrency Mitigation](#)  
[Concurrency SDRC](#)

Admin Reports

[CSA Tally](#)

View:

	Date Submitted	Review Date	App Type	Seq No	Jurisdiction	Year	Adj	Copy	Project Name
	03/02/2018		CEA	1	OAK	2018			THE CROSSINGS AT GOPHER SKINK PRESERVE
	02/27/2018		CMA	4	ORL	2018			ALEXAN NORTH
	02/23/2018		CEA	9	OC	2018			HANNAH SMITH
	02/22/2018		CMA	1	OCE	2018			CIARRA PLACE @ LAKE MEADOW
	02/20/2018		CEA	8	OC	2018			TYSON PROPERTY
	02/19/2018	02/19/2018	CMA	2	ORL	2018	ADJ		VERANDA PARK II
		02/19/2018	CMA	2	ORL	2018			VERANDA PARK II
	02/16/2018	02/19/2018	CEA	4	APK	2018			HIDDEN LAKE RESERVE
		02/23/2018	INF	3	OC	2018			TILDEN ROAD
	02/14/2018	02/23/2018	INF	2	OC	2018			LAKE AUSTIN
	02/13/2018		CMA	1	MTL	2018			GEM LAKE APARTMENTS
	02/12/2018	02/19/2018	CEA	3	ORL	2018			2020 HARRELL ROAD
			CEA	7	OC	2018			2020 HARRELL ROAD
			CMA	6	OC	2018			GEM LAKE APARTMENTS
	02/07/2018	02/07/2018	CMA	1	ORL	2018			PARK CENTRAL APARTMENTS
		02/07/2018	CMA	1	ORL	2018	ADJ		PARK CENTRAL APARTMENTS
	02/02/2018	02/19/2018	CEA	3	APK	2018			VISTA RESERVE
	01/30/2018	01/30/2018	CEA	5	OC	2018			NORTHEAST PD AMENDMENT
	01/19/2018	02/02/2018	CEA	2	APK	2018			ERROL ESTATES
	01/18/2018	01/30/2018	CEA	4	OC	2018			HAMLIN SOUTHWEST PD



School Capacity Determination

User ID #: 57782    May 7, 2019    13:29:39

Project ID:                                    CEA – OAK – 18 – 001                                    Valid Until: August 29, 2018

**Project Name: THE CROSSINGS AT GOPHER SKINK PRESERVE**

<b>Unvested Units</b>	Single Family Units:	178	<b>Vested Units</b>	Single Family Units:	2
	Multi Family Units:	0		Multi Family Units:	0
	Town Homes Units:	0		Town Homes Units:	0

<b>Capacity Enhancement</b>	School Level	Elementary	Middle	High
	CSA:	HH		
	School:	INDEPENDENCE ES	BRIDGEWATER MS	WINDERMERE HS
	<i>Analysis of Existing Conditions</i>			
	School Capacity (2018-2019)	832	1,176	2,753
	Enrollment (2018-2019)	1,308	2,609	3,360
	Utilization (2018-2019)	157.0%	222.0%	121.0%
	LOS Standard	110.0%	100.0%	100.0%
	Available Seats	0	0	0
	<i>Analysis of Reserved Capacity</i>			
	School Level	Elementary	Middle	
	Encumbered Capacity	2	0	216
	Reserved Capacity	11	32	127
	Adjusted Utilization	158.8%	224.6%	134.5%
	Adjusted Available Seats	0	0	0
	<i>Analysis of Proposed Development</i>			
	Students Generated	33.998	16.910	23.318
	Adjusted Utilization	162.9%	226.0%	135.3%
PASS/FAIL	<b>FAIL</b>	<b>FAIL</b>	<b>FAIL</b>	
Number of Seats to Mitigate	33.998	16.910	23.318	

**Capacity Enhancement  
Output Sheet**

# Capacity Enhancement Calculation Sheet



Facilities Planning  
Orange County Public Schools

May 7, 2019 13:30:05

Capital Contribution Calculation

CEA-OAK-18-001 THE CROSSINGS AT GOPHER SKINK PRESE	ES Single Family (Unvested Only)	ES Multifamily (Unvested Only)	ES Townhomes (Unvested Only)	ES Total	MS Single Family (Unvested Only)	MS Multifamily (Unvested Only)	MS Townhomes (Unvested Only)	MS Total	HS Single Family (Unvested Only)	HS Multifamily (Unvested Only)	HS Townhomes (Unvested Only)	HS Total	Total
Status	FAIL				FAIL				FAIL				
Generation Rate	0.191	0.149	0.162		0.095	0.063	0.076		0.131	0.070	0.092		
Housing Units Proposed (Non-Exempt)	178	0	0	178	178	0	0	178	178	0	0	178	0
Net Development Impact				33,998				16,91				23,318	0
Total Cost per Student Station for Failing Schools				\$ 27,053				\$ 27,053				\$ 27,053	
Net Impact Cost per Student for Passing Schools				\$ 21,065				\$ 21,065				\$ 21,065	
Capital Contribution per Student				\$ 5,988				\$ 5,988				\$ 5,988	
Capital Contribution Due				\$ 203,580				\$ 101,257				\$ 139,628	\$ 444,465

Impact Fee Calculator	Single Family	Multi Family	Townhomes	Total
Housing Units Proposed	178	0	0	
Impact Fee Rate	\$ 8,784	\$ 5,919	\$ 6,930	
Total Estimated Impact Fee	\$ 1,563,552	\$ 0	\$ 0	\$ 1,563,552

Total Fiscal Impact
\$ 2,008,017



School Concurrency Determination

User ID #: 57782 May 7, 2019 13:35:27

Project ID:

CMA-OA18-002

Valid Until: November 3, 2019

**Project Name: THE CROSSINGS AT GOPHER SKINK PRESERVE PHASE 1**

Unvested Units: Single Family Units: 180 Multi Family Units: 0 Town Homes Units: 0

Concurrency	School Level	Elementary	Middle	High
	CSA:	HH		
	School:	INDEPENDENCE ES	BRIDGEWATER MS	WINDERMERE HS
	<i>Analysis of Existing Conditions</i>			
	CSA Capacity (2018-2019)	1,691	1,176	2,753
	Enrollment (2018-2019)	2,772	2,609	3,360
	Utilization (2018-2019)	163.9%	221.9%	122.0%
	LOS Standard	110.0%	100.0%	100.0%
	Available Seats	0	0	0
	<i>Analysis of Reserved Capacity</i>			
	Encumbered Capacity	131	0	216
	Reserved Capacity	11	32	127
	Adjusted Utilization	172.3%	224.6%	134.5%
	Adjusted Available Seats	0	0	0
	<i>Analysis of Proposed Development</i>			
Students Generated	34.380	17.100	23.580	
Adjusted Utilization	174.4%	226.0%	135.4%	
PASS/FAIL	<b>FAIL</b>	<b>FAIL</b>	<b>FAIL</b>	
Number of Seats to Mitigate	34.380	17.100	23.580	

Adjacency	School Level	Elementary	Middle	High
	CSA:	JJ		
	School:	SAND LAKE ES	BRIDGEWATER MS	WINDERMERE HS
	<i>Analysis of Existing Conditions</i>			
	School Capacity (2018-2019)	2,298	1,176	2,753
	Enrollment (2018-2019)	2,011	2,609	3,360
	Utilization (2018-2019)	87.5%	221.9%	122.0%
	LOS Standard	110.0%	100.0%	100.0%
	Available Seats	517	0	0
	<i>Analysis of Reserved Capacity</i>			
	Encumbered Capacity	0	0	50
	Reserved Capacity	40	0	38
	Adjusted Utilization	89.2%	221.9%	125.2%
	Adjusted Available Seats	477	0	0
	<i>Analysis of Proposed Development</i>			
Students Generated	34.380	17.100	23.580	
Adjusted Utilization	90.7%	223.3%	126.1%	
PASS/FAIL	<b>PASS</b>	<b>FAIL</b>	<b>FAIL</b>	
Number of Seats to Mitigate	0.000	17.100	23.580	

# Concurrency Output Sheet

# Concurrency Calculation Sheet

## Capital Contribution Calculation

CMA-OAK-18-002 THE CROSSINGS AT GOPHER SKINK PRESE	ES Single Family (Unvested Only)	ES Multifamily (Unvested Only)	ES Townhomes (Unvested Only)	ES Total	MS Single Family (Unvested Only)	MS Multifamily (Unvested Only)	MS Townhomes (Unvested Only)	MS Total	HS Single Family (Unvested Only)	HS Multifamily (Unvested Only)	HS Townhomes (Unvested Only)	HS Total	Total
	PASS				FAIL				FAIL				
Status	PASS				FAIL				FAIL				
Generation Rate	0.191	0.149	0.162		0.095	0.063	0.076		0.131	0.070	0.092		
Housing Units Proposed	180	0	0	180	180	0	0	180	180	0	0	180	0
Development Impact (Students Generated)	34.38	0	0	34.38	17.1	0	0	17.1	23.58	0	0	23.58	75.06
Net Development Impact	0	0	0	0	17.1	0	0	17.1	23.58	0	0	23.58	40.68
Available Capacity				0				0				0	0
Total Cost per Student Station for Failing Schools				\$ 27,053				\$ 27,053				\$ 27,053	
Proportionate Share				\$ 0				\$ 462,606				\$ 637,910	\$ 1,100,516

Impact Fee Credit Calculation	Single Family	Multi Family	Townhomes	Total
Equivalent Residential Units (ERU)	97.554	0	0	97.554
Impact Fee Rate	\$ 8,784	\$ 5,919	\$ 6,930	
Impact Fee Credit	\$ 856,914.34	\$ 0.00	\$ 0.00	\$ 856,914.34

Paragraph 6

Reservation Fees	Single Family	Multi Family	Townhomes	Total
Reservation Fee Residential Units	180	0	0	180
Reservation Fee Total	\$ 1,581,120.00	\$ 0.00	\$ 0.00	\$ 1,581,120.00

Paragraph 9

Payment Summary & Installments:	Prop Share
Impact Fee Credit (Included in Proportionate Share)	\$ 856,914.34
Prop Share minus Impact Fee Credit (Amount due over Impact Fee)	\$ 243,601.70
Due at Plat (Proportionate Share)	\$ 1,100,516.04

Paragraph 4

Reservation Fees (May be drawn from Impact Fee Credit Account, if available)				
1st Installment (Due at Plat)	\$ 527,040.00	\$ 0.00	\$ 0.00	\$ 527,040.00
2nd Installment (Due 12 months after Plat)	\$ 527,040.00	\$ 0.00	\$ 0.00	\$ 527,040.00
3rd Installment (Due 24 months after Plat)	\$ 527,040.00	\$ 0.00	\$ 0.00	\$ 527,040.00

Paragraph 9a

Paragraph 9b

Paragraph 9c

\*Or any remaining impact fees

PAYMENT SUMMARY	
Estimated Total Impact Fees	\$ 1,581,120.00
Additional Due	\$ 243,601.70
<b>PROJECT TOTAL*</b>	<b>\$ 1,824,721.70</b>

\*Project Total is an estimate as School Impact Fees are subject to change.

CSA Tally

CSA	School	Type	Original Capacity	Encumbered Student Stations	Reserved Student Stations	Final Capacity
<b>Elementary Schools</b>						
1332	133-K8-N-6 (2018)	ES	810	0	0	810
2052	205-K8-SW-6 (2018)	ES	810	2	0	808
1012	25-E-SW-4 (2019)	ES	837	0	0	837
981	ARBOR RIDGE	ES	509	0	0	509
531	AUDUBON PARK	ES	842	0	0	842
1401	Aloma	ES	644	0	10	634
321	Andover	ES	774	175	0	599
1282	Apopka	ES	830	40	16	774
222	Avalon	ES	754	0	0	754
611	Azalea Park	ES	696	2	0	694
1392	BAY LAKE	ES	837	26	142	669
631	BLANKNER	ES	602	0	0	602
1071	Bay Meadows	ES	810	58	46	706
871	Bonneville	ES	850	44	0	806
751	Brookshire	ES	680	0	0	680
741	CYPRESS PARK DURRANCE	ES	650	0	0	650
217	Camelot	ES	754	0	0	754
1612	Castle Creek	ES	828	0	0	828
701	Catalina	ES	824	0	87	737
711	Cheney	ES	754	7	0	747
831	Chickasaw	ES	870	0	0	870
216	Citrus	ES	758	25	0	733
884	Citrus	ES	822	11	0	811

**Reserved and Encumbered Capacity Tally**

# Process

Factors that determine if capacity is available

How capital contribution is calculated

Standard agreement terms

Board approval process

# Formal School Capacity Determinations

## Capacity Enhancement

- Approval
  - Must obtain zoning approval within 6 months of receiving letter
  - Must obtain FLUM approval by end of the cycle
- Denial
  - Must obtain CEA within 6 months of receiving letter, and prior to local government approval of FLU/zoning

## Concurrency

- Approval
  - Capacity Encumbrance Letter (CEL) approval “encumbers” project capacity at affected school and establishes reservation fee payment schedule
- Denial
  - CMA needed upon issuance of a CEL denial letter
  - Executed CMA serves as CEL approval (Cities)



# Analysis Tools

- Encumbered and reserved capacity adjusts frequently
  - New concurrency applications encumber capacity for 6 months
  - One (1) six-month extension is permitted
  - Capacity reservations = 3 years or project build-out
  - Capacity may be reserved or encumbered in an adjacent school
  - Capacity returned to the “bank” after construction
- Because available capacity can change, it is unreliable to calculate mitigation on your own
  - OCPS will provide you with a detailed calculation spreadsheet
  - Updated capacity and enrollment data available at <http://planning.ocps.net>
  - “Worst Case Scenario” mitigation calculation:
    - $((\text{Total Units} \times \text{SGR}) \times \$5,988) = \text{Capital Contribution}$
    - \$5,988 subject to change following update of impact fee study

# Analysis Tools

CEA = Enrollment / Capacity (Includes Future Capacity)

CMA = Enrollment / Capacity (Includes Future & Adjacent Capacity)

- “Adjusted” FISH (Florida Inventory of School Houses) capacity
  - Updated annually on October 15<sup>th</sup>
  - Includes new schools, capacity additions, and reflects the first three years of the new capital outlay plan
- School capacity scheduled to open during the first three (3) years of the CIP considered “built”
  - Example: 2018-19 School Year (current)
    - Year 1: 2019-20
    - Year 2: 2020-21
    - Year 3: 2021-22
    - Year 4: 2022-23

**PASS\***  
**(Most of the time)**

# Typical CEA Conditions

- Capital Contribution based upon cost per student station
- ~~Prepayment of school impact fees~~
- Payments due prior to recording of final plat (county) or site plan approval (most cities)
- Land conveyance for school sites – value, timing, process
- Timing restrictions may be used if relief school not available

# Typical CMA Conditions

- Mitigation based on proportionate share formula
- Proportionate share eligible for school impact fees credits, but credits will not exceed the value of the school impact fee
- Payments due in accordance with the fee schedule set forth in the agreement
  - Reservation fee payment schedule included in CMA
- CEA capital contribution credited toward CMA proportionate share
  - No double payments

# Cost Data

**Table 8**  
Net Cost per Student

Total Impact Cost	Per Student
Facility Impact Cost <sup>(1)</sup>	\$25,468
Transportation Impact Cost <sup>(2)</sup>	\$823
Ancillary Facility Cost <sup>(3)</sup>	\$762
<b>Total Impact Cost<sup>(4)</sup></b>	<b>\$27,053</b>
Revenue Credit	Per Student
Capital Improvement Credit <sup>(5)</sup>	\$4,284
Debt Service Credit <sup>(6)</sup>	\$1,704
<b>Total Revenue Credit<sup>(7)</sup></b>	<b>\$5,988</b>
Net Impact Cost	Per Student
<b>Net Impact Cost<sup>(8)</sup></b>	<b>\$21,065</b>

**Table 10**  
Calculated School Impact Fee Schedule

Land Use	Unit	Students per Unit <sup>(1)</sup>	Net Impact Cost per Student <sup>(2)</sup>	Total Impact Fee <sup>(3)</sup>
Single Family (detached)	du	0.417	\$21,065	\$8,784
Townhouse	du	0.329	\$21,065	\$6,930
Multi-Family	du	0.281	\$21,065	\$5,919
Mobile Home	du	0.289	\$21,065	\$6,088

Source: School Impact Fee Study, Tindale-Oliver & Associates, February 5, 2016

# Numbers You Need to Know\*

Term	2019 – Draft/Proposed	Current	2011-2016	2007-2010**
Total Cost per Student	\$28,436.00	\$27,053.00	\$20,843.00	\$34,520.00
Net Impact Cost per Student	\$23,606.00	\$21,065.00	\$15,140.00	\$25,275.00
Revenue Credit per Student (Capital Contribution)	\$4,830.00	\$5,988.00	\$5,703.00	\$9,245.00
School Impact Fee				
SF	\$9,560.00	\$8,784.00	\$6,525.00	\$13,041.00
TH	\$8,805.00	\$6,930.00	\$3,921.00	\$7,328.00
MF	\$6,751.00/\$6,610	\$5,919.00	\$3,921.00	\$7,328.00
MF-HR	\$307.00/\$6,610	\$5,919.00	\$3,921.00	\$7,328.00

## Single Family

Level	Rate
Elementary	.191
Middle	.095
High	.131
<b>Total</b>	<b>.417</b>
<b>Proposed New</b>	<b>.405</b>

## Townhouse

Level	Rate
Elementary	.162
Middle	.076
High	.092
<b>Total</b>	<b>.329</b>
<b>Proposed New</b>	<b>.373</b>

## Multi-Family

Level	Rate
Elementary	.159
Middle	.063
High	.070
<b>Total</b>	<b>.281</b>
<b>Proposed New</b>	<b>.286/.280</b>

\*\* 2006 Impact Fee Study included indexing

# CEA Capital Contribution Formula

<i>CEA Scenario</i>								
<i>Capital Contribution</i>								
# Dwelling units	X	SGR by Level	=	Net Development Impact (Students)	X	Revenue Credit	=	Capital Contribution
178		0.191		33.998	\$	5,988.00		\$ 203,580.02
178		0.095		16.91	\$	5,988.00		\$ 101,257.08
178		0.131		23.318	\$	5,988.00		\$ 139,628.18
		<b>0.417</b>		<b>74.226</b>				<b>\$ 444,465.29</b>

# Concurrency Formulas

## Proportionate Share

- Section 19.2 of the Amended & Restated ILA

**Proportionate Share Mitigation =  
(Development Impact – Available Capacity) X Total Cost**

- *Translation:* Proportionate Share Mitigation = (# Student Stations Needed – Available Capacity) X Cost per Student Station

## Impact Fee Credit

- County Ordinance 30-622(c)

**Impact Fee Credit = Equivalent Residential Units for which Proportionate Share is Provided X Impact Fee per Dwelling Unit**

Translation:

- Net Development Impact = Development Impact – Available Capacity
- ERU = Net Development Impact / Student Generation Rate

# Concurrency Proportionate Share Formula

<i>Scenario #1</i>						
<i>Proportionate Share Mitigation</i>						
# Dwelling units	X	SGR by Level =	Net Development Impact (Students)	X	Total Cost =	Proportionate Share
178		0.191	33.998		\$ 27,053.00	\$ 919,747.89
178		0.095	16.91		\$ 27,053.00	\$ 457,466.23
178		0.131	23.318		\$ 27,053.00	\$ 630,821.85
		<b>0.417</b>	<b>74.226</b>			<b>\$ 2,008,035.98</b>

\* This example uses the single family student generation rate. Multi-Family & townhouses use a different student generation rate.



# Concurrency Proportionate Share Formula

<i>Scenario #1</i>						
<i>Proportionate Share Mitigation</i>						
# Dwelling units	X	SGR by Level =	Net Development Impact (Students)	X	Total Cost =	Proportionate Share
178		0.191	33.998		\$ 27,053.00	\$ 919,747.89
178		0.095	16.91		\$ 27,053.00	\$ 457,466.23
178		0.131	23.318		\$ 27,053.00	\$ 630,821.85
		<b>0.417</b>	<b>74.226</b>			<b>\$ 2,008,035.98</b>

<i>Impact Fee Credit</i>					
Net Development Impact (Students)	/	Total SGR =	ERU X	Single Family Impact Fee =	Impact Fee Credit
74.226		0.417	178	\$ 8,784.00	\$ 1,563,552.00

\* This example uses the single family student generation rate. Multi-Family & townhouses use a different student generation rate.

# Concurrency Proportionate Share Formula

<i>Scenario #1</i>						
<b>Proportionate Share Mitigation</b>						
# Dwelling units	X	SGR by Level =	Net Development Impact (Students)	X	Total Cost =	Proportionate Share
178		0.191	33.998		\$ 27,053.00	\$ 919,747.89
178		0.095	16.91		\$ 27,053.00	\$ 457,466.23
178		0.131	23.318		\$ 27,053.00	\$ 630,821.85
		<b>0.417</b>	<b>74.226</b>			<b>\$ 2,008,035.98</b>

<b>Impact Fee Credit</b>						
Net Development Impact (Students)	/	Total SGR =	ERU	X	Single Family Impact Fee =	Impact Fee Credit
74.226		0.417	178		\$ 8,784.00	\$ 1,563,552.00

<b>Total Prop Share</b>	\$ 2,008,035.98	<b>Total Impact Fees</b>	\$ 1,563,552.00
<b>Impact Fee Credit</b>	\$ 1,563,552.00		
<b>Additional Due</b>	\$ 444,483.98	<b>Total Project Fiscal Impact</b>	\$ 2,008,035.98

\* This example uses the single family student generation rate. Multi-Family & townhouses use a different student generation rate.

# Concurrency Proportionate Share Formula

<i>Scenario #2</i>						
<i>Proportionate Share Mitigation</i>						
# Dwelling units	X	SGR by Level =	Net Development Impact (Students)	X	Total Cost =	Proportionate Share
178		0.191	0		\$ 27,053.00	\$ -
178		0.095	16.91		\$ 27,053.00	\$ 457,466.23
178		0.131	23.318		\$ 27,053.00	\$ 630,821.85
		<b>0.417</b>	<b>40.228</b>			<b>\$ 1,088,288.08</b>

\* This example uses the single family student generation rate. Multi-Family & townhouses use a different student generation rate.

# Concurrency Proportionate Share Formula

<i>Scenario #2</i>								
<i>Proportionate Share Mitigation</i>								
# Dwelling units	X	SGR by Level	=	Net Development Impact (Students)	X	Total Cost	=	Proportionate Share
178		0.191		0		\$ 27,053.00		\$ -
178		0.095		16.91		\$ 27,053.00		\$ 457,466.23
178		0.131		23.318		\$ 27,053.00		\$ 630,821.85
		<b>0.417</b>		<b>40.228</b>				<b>\$ 1,088,288.08</b>

<i>Impact Fee Credit</i>								
Net Development Impact (Students)	/	Total SGR	=	ERU	X	Single Family Impact Fee	=	Impact Fee Credit
40.228		0.417		96.470		\$ 8,784.00		\$ 847,392.69

# Concurrency Proportionate Share Formula

<i>Scenario #2</i>								
<i>Proportionate Share Mitigation</i>								
# Dwelling units	X	SGR by Level	=	Net Development Impact (Students)	X	Total Cost	=	Proportionate Share
178		0.191		0		\$ 27,053.00		\$ -
178		0.095		16.91		\$ 27,053.00		\$ 457,466.23
178		0.131		23.318		\$ 27,053.00		\$ 630,821.85
		<b>0.417</b>		<b>40.228</b>				<b>\$ 1,088,288.08</b>

<i>Impact Fee Credit</i>								
Net Development Impact (Students)	/	Total SGR	=	ERU	X	Single Family Impact Fee	=	Impact Fee Credit
40.228		0.417		96.470		\$ 8,784.00		\$ 847,392.69

<b>Total Prop Share</b>	\$ 1,088,288.08	<b>Total Impact Fees</b>	\$ 1,563,552.00
<b>Impact Fee Credit</b>	\$ 847,392.69		
<b>Additional Due</b>	\$ 240,895.39	<b>Total Project Fiscal Impact</b>	\$ 1,804,447.39

\* This example uses the single family student generation rate. Multi-Family & townhouses use a different student generation rate.

# Per Unit Capital Contribution Costs

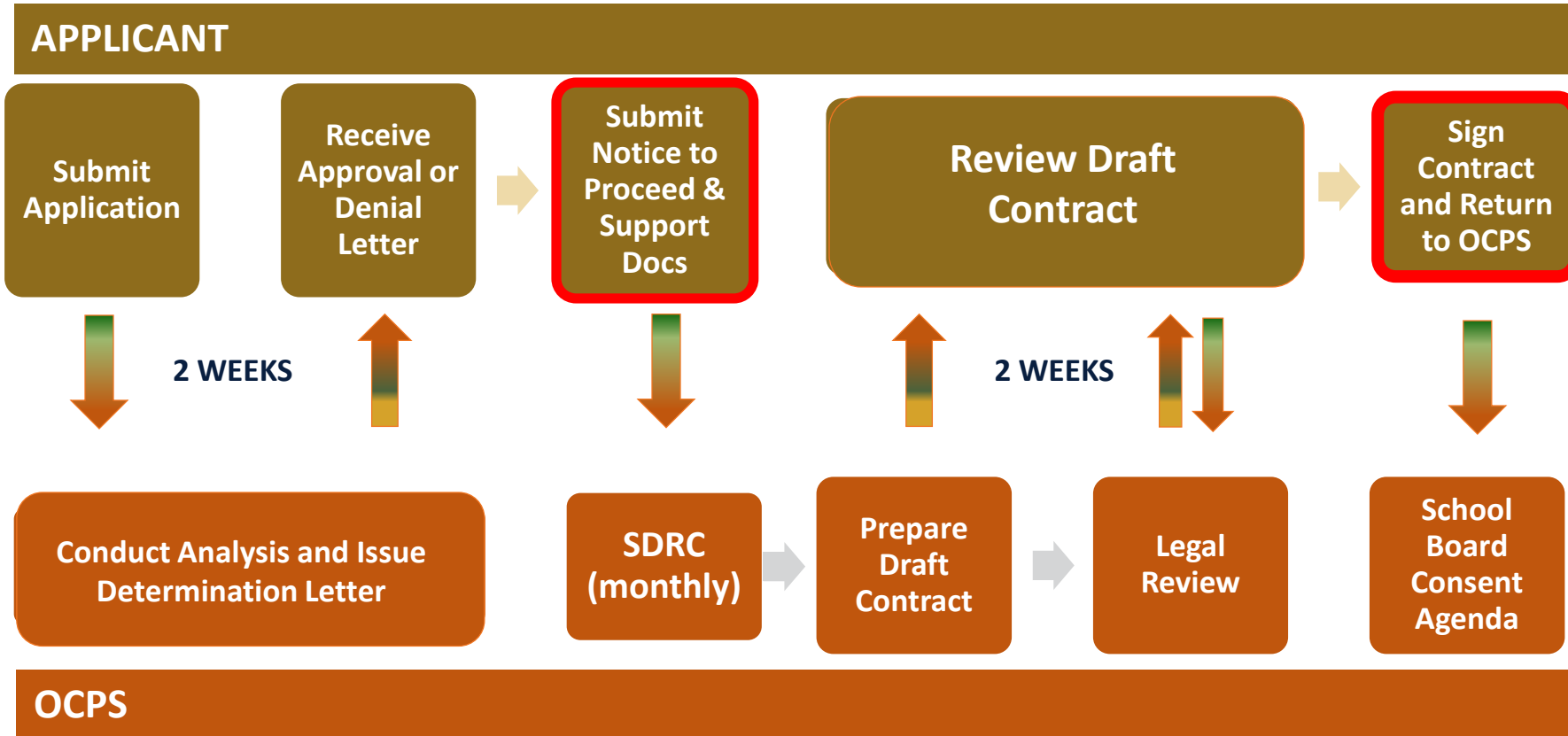
	ES Only	MS Only	HS Only	Total
Single Family	\$1,143.71	\$569.86	\$784.43	\$2,497.00
Multi-Family	\$892.21	\$377.24	\$419.16	\$1,976.04
Townhome	\$970.06	\$455.09	\$550.90	\$1,688.61

\*Amounts will change upon implementation of School Impact Fee Study Update findings, estimated January 2020

# Concurrency – CEA Credits

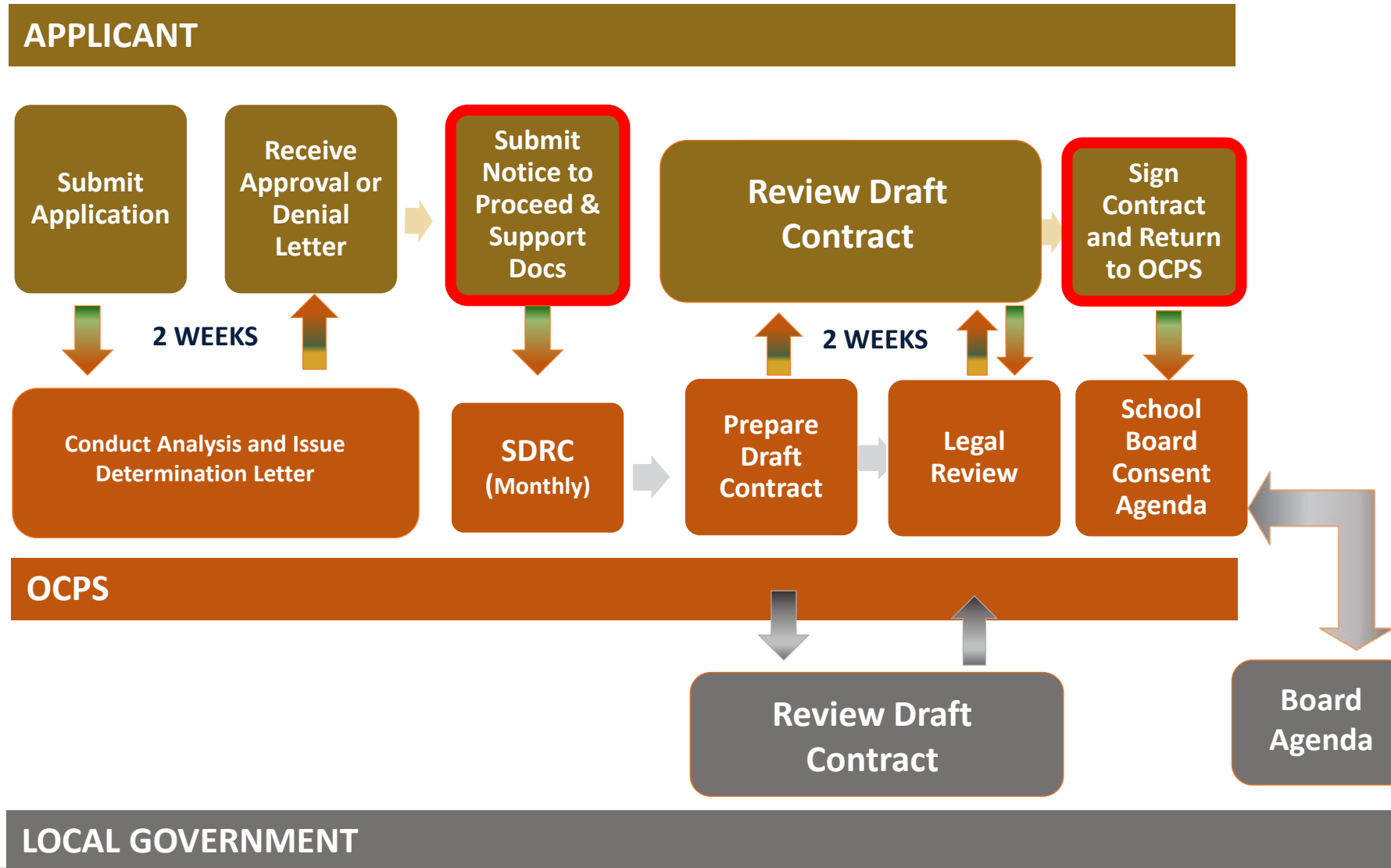
- Concurrency reservations are at an all-time high due to activity levels and Executive Order extensions
- CEA vested units are subject to concurrency
- CEA mitigation credited toward prop share on a school level basis
  - CEA mitigation for middle school can be applied toward CMA prop share for a middle school CSA
  - CEA mitigation for an elementary school will not be applied toward CMA prop share for a middle school CSA

# CEA Board Approval Process





# CMA Board Approval Process



# Capacity Solution Options

Included in CEA/CMA

- Purchase of real property for construction of additional school facilities that would provide additional capacity
- Construction of additional permanent student stations in new buildings or through renovation of existing buildings
- Construction of additional core facilities in new schools or expansion of existing core facilities in existing schools
- Provision of additional temporary capacity through the lease or purchase of portable facilities until permanent facilities may be constructed
- Advancing a school included in the most recent Capital Outlay Plan that will provide capacity for the students generated by the Applicant's Development Application
- Any other actions which will result in provision of the necessary school capacity

# Platting Process

## County

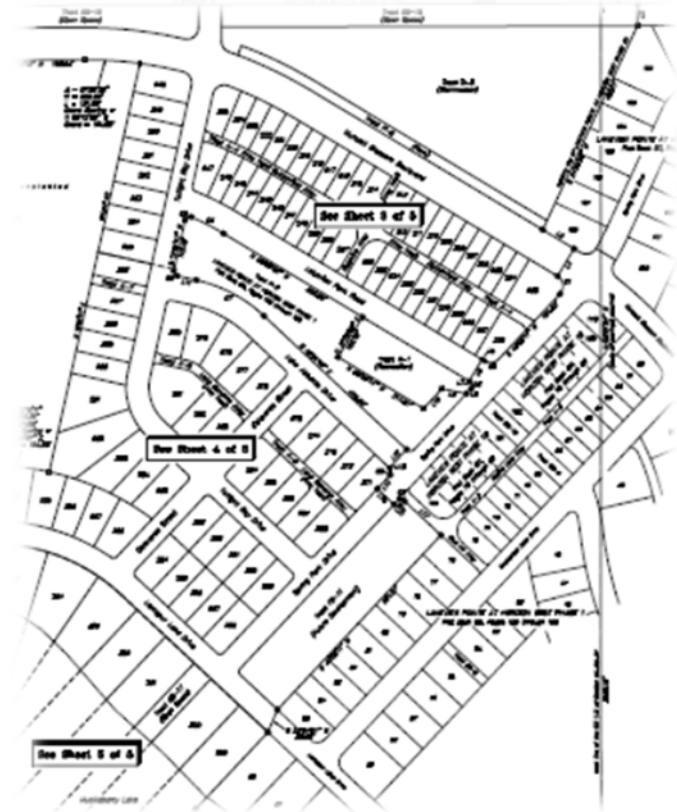
- Plats flagged when CEA condition of approval exists
- OCPS receives plat notifications from Planning
- OCPS alerts Planning when CEA conditions are satisfied
- Planning approves plat on behalf of OCPS
- Concurrency must be met through vesting/exemption, an approval, or a CMA



# Platting Process

## Municipalities

- OCPS receives plat notifications from most municipalities, as well as from TRC/MPB agendas
- Municipalities require OCPS letter of authorization off before they will approve plats
  - Prepaid Impact Fee Form (or Mitigation Form)
  - Prepaid Impact Fee Check
  - Mitigation
  - Assignment (if applicable)
  - Copy of Plat
- Prepaid impact fees must go through OCPS to avoid delays
- Concurrency must be met through vesting/ exemption, an approval, or a CMA



# Expediting OCPS's Plat Sign-off

- **Read your CEA** and understand the terms
  - **Section 4** describes all payment terms
  - **Section 8 (New) or Section 10 (Old)** addresses termination of the CEA
  - **Section 18** of the CEA requires OCPS approval of all assignments
- **Read your CMA** and understand the terms
  - **Section 4** describes proportionate share
  - **Section 9** establishes capacity reservation fee amounts
- Send a complete prepaid impact fee form/mitigation form and include all requested attachments (copy of proposed plat, assignment of credits, etc.)
- Impact fee check should be made out to the local government, but sent to OCPS
  - This is especially true for **multi-family**. If you pay at building permit, we don't know that you've paid and we'll hold up your Building Permits and/or C.O.!
- Submit your prepayment package early – sometimes we take a few days off!



This form must be completed and returned to the Department of Facilities Planning at Orange County Public Schools (OCPS) in conjunction with each plat request made to the local government to satisfy Section 4.c. of a School Mitigation Agreement ("Agreement"). When applicable, a check for the Capital Contribution payable to OCPS should accompany this form.

Received Stamp

# School Mitigation Form (New)

\*\*\*THIS FORM APPLIES ONLY TO AGREEMENTS EXECUTED AFTER FEBRUARY 1, 2018.\*\*\*

<b>SECTION 1: CEA INFORMATION</b>	CEA #:	
	CEA Title:	
	Jurisdiction:	
	Parcel ID(s) of property in this request: <sup>1</sup>	
	General Location:	
	Development Permit Type: <sup>2</sup>	
Please include copies of all transfers and/or assignments of units under the original CEA to the current property owner.		<b>Acknowledge and Initial:</b> <input type="checkbox"/> _____

<b>SECTION 2: APPLICANT INFORMATION</b>	Date:
	Applicant Name:
	Company:
	Phone #:
	Email:
	Signature:

Section 3: Applicant Checklist	
<input type="checkbox"/>	If applicable, copy of assignment and/or transfer of CEA credits to property. (Attach to email)
<input type="checkbox"/>	11 X 17 copy of the site plan/plat associated with this request. (Attach to email)
<input type="checkbox"/>	If applicable, check for Capital Contribution, payable to the <u>Orange County Public Schools</u> .

# School Mitigation Form (New)

<b>SECTION 4: DEVELOPMENT PROFILE</b>	Plat/Site Plan Title: <sup>3</sup> <i>Gopher Skink Preserve Phase 1</i>				
	Project Name: <i>The Crossings at Gopher Skink Preserve</i>				
	<b>New Units (CEA Units)</b>				
		<b>Total # of Units</b>	<b># Single Family</b>	<b># Multi-Family</b>	<b># Townhome</b>
	CEA Units	<i>178</i>	<i>178</i>		
	CEA Units in this Request	<i>88</i>	<i>88</i>		
	CEA Units in Previous Plats	<i>0</i>	<i>0</i>		
	CEA Units Balance	<i>90</i>	<i>90</i>		
	<b>Vested Units (Leave blank if there are no vested units)<sup>4</sup></b>				
	Vested Units	<i>2</i>	<i>2</i>		
	Vested Units in this Request	<i>2</i>	<i>2</i>		
	Vested Units in Previous Plats	<i>0</i>	<i>0</i>		
	Vested Balance	<i>0</i>	<i>0</i>		

<b>SECTION 5: MITIGATION</b>	<b>Please refer to Section 4.a. of the Agreement</b>				
	<b>Capital Contribution Amount (Payable to Orange County School Board)</b>				
	<b>Unit Type</b>	<b># of Units</b>		<b>\$ per Unit</b>	<b>Total Mitigation</b>
	SF	<i>90</i>	X	\$ <i>2,496.98</i>	\$ <i>219,735.00</i>
	TH		X	\$	\$
	MH		X	\$	\$
			<b>GRAND TOTAL:</b>	\$ <i>219,735.00</i>	

# Prepaid Impact Fee Form (Old)

- Form must accompany all prepaid impact fee payments
- “Exhibit C” on standard CEAs (pre-2018)



## ORANGE COUNTY PUBLIC SCHOOLS PRE-PAID SCHOOL IMPACT FEE FORM

DEPARTMENT OF FACILITIES PLANNING

6501 MAGIC WAY, BUILDING 200, ORLANDO, FL 32809

TEL: 407-317-3974 / FAX: 407-317-3263 / WEBSITE: <http://planning.ocps.net>

A Public Education Agreement (PEA) or Capacity Enhancement Agreement (CEA) may require property owners and developers to pre-pay School Impact and Mitigation Fees at some point in the development process prior to issuance of a building permit.

This form must be completed and returned to the Department of Facilities Planning at Orange County Public Schools (OCPS) with a check payable to the Orange County Board of County Commissioners in the amount of the estimated impact fees. Questions regarding this form should be directed to:

<b>SECTION 1: CEA INFORMATION</b>	<b>CEA #:</b>	OAK-18-001
	<b>CEA Title:</b>	The Crossings at Gopher Skink Preserve
	<b>Jurisdiction:</b>	Town of Oakland
	<b>Parcel ID(s) of property in this request:<sup>1</sup></b>	04-24-28-0000-00-555
	<b>General Location:</b>	Middle of Nowhere
	<b>Development Permit Type:<sup>2</sup></b>	Final Plat
Please include copies of all transfers and/or assignments of units under the original CEA to the current property owner.		<b>Acknowledge and Initial:</b> <input checked="" type="checkbox"/> <span style="border: 1px solid red; padding: 2px;">JCS</span>

<b>SECTION 2: APPLICANT INFORMATION</b>	<b>Date:</b>	April 5, 2018
	<b>Applicant Name:</b>	Julie Salvo
	<b>Company:</b>	OCPS
	<b>Phone #:</b>	407-317-3700
	<b>Email:</b>	julie.salvo@ocps.net



# Prepaid Impact Fee Form – Section 3

<b>SECTION 3: DEVELOPMENT PROFILE</b>	Plat/Site Plan Title: <sup>3</sup> Gopher Skink Preserve Phase 1				
	PD Title: The Crossings at Gopher Skink Preserve				
	<b>Non-Vested/New Units (CEA Units)</b>				
		<b>Total # of Units</b>	<b># Single Family</b>	<b># Multi-Family</b>	<b># Townhome</b>
	CEA Units*	178	178		
	CEA Units in Request	88	88		
	CEA Units in Previous Plats	0	0		
	CEA Non-Vested Balance	90	90		
	<b>Vested Units (Leave blank if there are no vested units)<sup>4</sup></b>				
	Vested Units	2	2		
	Vested Units in Request	2	2		
	Vested Units in Previous Plats	0	0		
Vested Balance	0	0			
<i>*Please reference the number of "New Units" or "Non-Exempt Units" in your CEA. If you acquired New Units from an Assignment or Partial Assignment, please reference the number of units in your assignment, and attach a copy of the assignment to this submittal.</i>					

# Prepaid Impact Fee Form – Section 4

<b>SECTION 4: PAYMENT SUMMARY</b>	Prepaid Impact Fee Amount: \$ 88 * 8,784 = \$772,992.00		
	<i>A check made payable to the <b>Orange County Board of County Commissioners</b> must accompany this submittal. If the prepayment amount is correct and the form sufficient, a letter will be sent to Orange County authorizing the creation of a credit account. OCPS will forward the check and Letter of Authorization to Orange County.</i>		
	<b>Single Family</b>	<b>Multi-Family</b>	<b>Townhome</b>
	\$8,784/unit	\$5,919/unit	\$6,930/unit
	Does this CEA require an additional contribution? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>		
	Identify the section of the CEA that requires the additional payment		
	Status of the additional payment: <sup>5</sup> Paid on 4/5/18		
	<b>Additional Contribution Amount (Payable to Orange County School Board)</b>		
	\$ 88*\$2,497 = \$219,735		

APPLICANT CHECKLIST:	
<input checked="" type="checkbox"/>	Prepaid School Impact Fee check, payable to the <b>Orange County BCC</b> . (Deliver to OCPS)
<input checked="" type="checkbox"/>	If applicable, check for capital contribution, payable to the <b>Orange County School Board</b> . (Deliver to OCPS)
<input checked="" type="checkbox"/>	11 X 17 copy of the site plan/plat associated with this request. (Attach to email)
<input checked="" type="checkbox"/>	If applicable, copy of assignment and/or transfer of CEA credits to property. (Attach to email)

# Capacity Reservation Form – Section 4

<b>SECTION 4: PAYMENT SUMMARY</b>	<b>Capacity Reservation Fee Amount</b> (payable to the applicable local government)		
	Installment: <input type="checkbox"/> 1 <sup>st</sup> <input checked="" type="checkbox"/> 2 <sup>nd</sup> <input type="checkbox"/> 3 <sup>rd</sup> <input type="checkbox"/> Remaining Balance    \$ <u>          \$175,680.00          </u>		
	<b>Proportionate Share Mitigation Amount</b> (payable to Orange County School Board)		
	\$ <u>          \$811,580.00          </u>		
	<i>A check made payable to OCPS must accompany this form. If the prepayment amount is correct and the form complete and sufficient, a Letter of Authorization will be prepared by OCPS to inform the Applicable Local Government to create a credit account. OCPS will forward the Letter of Authorization to the Applicable Local Government and copy the Applicant.</i>		
	<b>Single Family</b>	<b>Multi-Family</b>	<b>Townhome</b>
	\$8,784/unit	\$5,919/unit	\$6,930/unit
	Does this CMA / CEL require an additional contribution?    Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>		
	Identify the section of the CMA / CEL that requires the mitigation payment?		
	Section 4		

\*Form only applies to concurrency in cities/towns (NOT Unincorporated County)

# Assignments/Transfers of Rights

- CEA (Section 18) and CMA (Section 17) addresses the assignment/transfer of CEA or CMA rights to a third party purchaser
- OCPS must consent to these assignments/transfers before they occur
- Facilities Planning is authorized to consent on behalf of the Superintendent
- Facilities Planning must possess the full chain of custody before signing off on plats

# Consortium Credits and Transfers

- Lakeview, Village F, Village H, and Southeast
- New Units also known as Owners Capacity Credits, School Capacity Credits, Credits, or Owner's Units
- Parties may buy, sell, and transfer credits within specified geographical area
- Mitigation associated with these consortiums has been paid and are eligible for a School Concurrency Vested Rights Certificate (SCVRC)
- **Prepaid impact fees are still due**
- Proof of credit ownership required





- New Impact Fee Rates –
  - SB Work Session May 14, 2019
  - BCC Public Hearing Sept 2019
  - Anticipated effective date January 2020
- County-initiated administrative rezonings
- New school openings



- **FACT:** Between 2011-2017, 85 new schools were built in Florida:
  - 40 (45%) built in Orange County
  - The rest built in 25 other counties
  - Orange will add 9 more over next 3 years

# Impact Fee Update

Option #1	Residential Category	Unit	Students per Unit	Net Impact Cost per Student	Total Impact Fee	Current Adopted Fee	Percent Change
	Single Family (Detached)	du	0.405	\$23,606	<b>\$9,560</b>	\$8,784	+9%
	Townhouse	du	0.373	\$23,606	<b>\$8,805</b>	\$6,930	+27%
	Multi-Family	du	0.280	\$23,606	<b>\$6,610</b>	\$5,919	+12%
	Mobile Home	du	0.440	\$23,606	<b>\$10,387</b>	\$6,088	+71%

Option #2	Residential Category	Unit	Students per Unit	Net Impact Cost per Student	Total Impact Fee	Current Adopted Fee	Percent Change
	Single Family (Detached)	du	0.405	\$23,606	<b>\$9,560</b>	\$8,784	+9%
	Townhouse	du	0.373	\$23,606	<b>\$8,805</b>	\$6,930	+27%
	<b>Multi-Family (High Rise)</b>	<b>du</b>	<b>0.013</b>	<b>\$23,606</b>	<b><u>\$307</u></b>	<b>\$5,919</b>	<b>-95%</b>
	Multi-Family (Other)	du	0.286	\$23,606	<b><u>\$6,751</u></b>	\$5,919	+14%
Mobile Home	du	0.440	\$23,606	<b>\$10,387</b>	\$6,088	+71%	

- High Rise Criteria:
- 7+ stories
  - 70 du/acre
  - Parking Structure

# Growth and Development Trends

- Development helps pay for growth
  - Impact fees cover ~78% of a student station – required on ALL new residential units
  - Capital contribution covers the remaining 22% - required on SOME new residential units



# New Schools – 2019 Openings

**Horizon West Middle School**



**Water Spring Elementary School**



# New Schools – 2019 Openings

**Castle View Elementary School**



**Pershing School**



# New Schools – 2020 and 2021 Openings

## 2020 Openings

- Site #20-E-SW-4
  - South International Drive/Lake Bryan area
- Site #83-E-SE-2
  - Marketplace Drive/Vista Park Area
- Site #85-E-SW-4
  - Horizon West/Summerport

## 2022 Openings (opening in 2021)

- Site #113-H-W-4
  - Windermere HS Relief on Seidel Rd.
- Site #80-H-SW-4
  - Dr. Phillips & Freedom HS Relief on Daryl Carter Pkwy

# Website Resources

- **Facilities Planning**

- <http://planning.ocps.net>
  - Includes online applications, submittal requirements, data, maps, and the school impact fee study
- Residential development layer <http://demographics.ocps.net>

- **Student Enrollment**

- <https://www.ocps.net/es/legislative/pupil/Pages/default.aspx>
  - Includes school zone maps and enrollment summaries

- **Orange County**

- <http://www.orangecountyfl.net/PlanningDevelopment/ConcurrencyManagement.aspx>
  - Includes applications for concurrency, vested rights, and submittal requirements

# Questions

