1 A bill to be entitled 2 An act relating to planning for educational 3 facilities; amending s. 163.3177, F.S.; 4 requiring that the future land use element of a local government's comprehensive plan include 5 6 certain criteria relating to location of 7 schools; specifying the date by which such 8 plans must comply and providing effect of 9 noncompliance; providing requirements with respect to the data and analyses on which a 10 public school facilities element should be 11 12 based; providing for goals, objectives, and policies; providing for a future conditions 13 14 map; amending s. 163.3180, F.S.; revising requirements for imposition of a school 15 concurrency requirement by a local government 16 17 and for the local government comprehensive plan 18 or plan amendment to implement such 19 requirement; requiring a public schools 20 facilities element; providing requirements for 21 level of service standards; providing 22 requirements for designation of service areas; 23 providing requirements with respect to financial feasibility; specifying an 24 25 availability standard; requiring that 26 intergovernmental coordination requirements be 27 satisfied and providing that certain municipalities are not required to be a 28 29 signatory of the required interlocal agreement; 30 providing duties of such municipalities to evaluate their status and enter into the 31

interlocal agreement when required, and 1 2 providing effect of failure to do so; providing 3 requirements for an interlocal agreement; 4 directing the state land planning agency to 5 adopt by rule minimum criteria for review and 6 determination of compliance of a public schools 7 facilities element; amending s. 163.3191, F.S.; providing that the local planning agency's 8 9 periodic report on the comprehensive plan shall assess the coordination of the plan with public 10 schools; amending s. 235.185, F.S.; directing 11 12 school boards to adopt annually 10-year and 20-year work programs in addition to the 13 14 required 5-year district facilities work 15 program; amending s. 235.19, F.S.; providing a directive to school boards with respect to 16 17 school location; amending s. 235.193, F.S.; 18 providing requirements for the 5-year district 19 facilities work program with respect to 20 enrollment and population projections; 21 precluding the siting of new schools in certain 22 jurisdictions; providing for interim use of certain criteria and guidelines by the state 23 land planning agency in compliance review of a 24 school concurrency system; providing an 25 26 alternative concurrency system for counties subject to final order by the Administration 27 28 Commission; providing an effective date.

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WHEREAS, the Legislature recognizes the need to determine educational facility needs as Florida continues to

grow, and the need to ensure that local school districts have adequate funds to finance needed educational facilities, and WHEREAS, the Legislature recognizes that the state has

an interest in school concurrency because public education is a state responsibility and because of the role of the state in the administration of statewide growth management policy, and

WHEREAS, the Legislature recognizes that state policy on school concurrency is incomplete, and

WHEREAS, it is the intent of the Legislature that local governments retain the authority to impose school concurrency on a local option basis within clearly defined parameters established by the state in statutes and rules, and

WHEREAS, it is the intent of the Legislature to increase predictability and minimize conflict and litigation in local governments which choose to impose school concurrency, and

WHEREAS, it is the intent of the Legislature that school concurrency, where implemented, should improve the state's educational system as well as advance the state's integrated planning and growth management system, NOW, THEREFORE,

Be It Enacted by the Legislature of the State of Florida:

Section 1. Paragraph (a) of subsection (6) of section 163.3177, Florida Statutes, is amended, and subsection (12) is added to said section, to read:

163.3177 Required and optional elements of comprehensive plan; studies and surveys.--

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(6) In addition to the requirements of subsections (1)-(5), the comprehensive plan shall include the following elements:

A future land use plan element designating proposed future general distribution, location, and extent of the uses of land for residential uses, commercial uses, industry, agriculture, recreation, conservation, education, public buildings and grounds, other public facilities, and other categories of the public and private uses of land. future land use plan shall include standards to be followed in the control and distribution of population densities and building and structure intensities. The proposed distribution, location, and extent of the various categories of land use shall be shown on a land use map or map series which shall be supplemented by goals, policies, and measurable objectives. Each land use category shall be defined in terms of the types of uses included and specific standards for the density or intensity of use. The future land use plan shall be based upon surveys, studies, and data regarding the area, including the amount of land required to accommodate anticipated growth; the projected population of the area; the character of undeveloped land; the availability of public services; and the need for redevelopment, including the renewal of blighted areas and the elimination of nonconforming uses which are inconsistent with the character of the community. The future land use plan may designate areas for future planned development use involving combinations of types of uses for which special regulations may be necessary to ensure development in accord with the principles and standards of the comprehensive plan and this act. The future land use plan of a county may also designate areas for possible future

municipal incorporation. The land use maps or map series shall generally identify and depict historic district 2 3 boundaries and shall designate historically significant 4 properties meriting protection. The future land use element 5 must clearly identify the land use categories in which public schools are an allowable use. When delineating the land use 6 7 categories in which public schools are an allowable use, a local government shall include in the categories sufficient 8 9 land proximate to residential development to meet the projected needs for schools in coordination with public school 10 boards and may establish differing criteria for schools of 11 12 different type or size. Each local government shall include 13 lands contiguous to existing school sites, to the maximum 14 extent possible, within the land use categories in which 15 public schools are an allowable use. All comprehensive plans 16 must comply with this paragraph no later than October 1, 1999, 17 or the deadline for the local government evaluation and appraisal report, whichever occurs first 1996. The failure by 18 19 a local government to comply with this requirement will result 20 in the prohibition of the local government's ability to amend the local comprehensive plan as provided by s. 163.3187(6).An 21 22 amendment proposed by a local government for purposes of 23 identifying the land use categories in which public schools are an allowable use is exempt from the limitation on the 24 frequency of plan amendments contained in s. 163.3187. The 25 26 future land use element shall include criteria which encourage 27 the location of schools proximate to urban residential areas to the extent possible and shall require that the local 28 29 government seek to collocate public facilities, such as parks, libraries, and community centers, with schools to the extent 30 31 possible.

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(12) A public school facilities element adopted to implement a school concurrency program shall meet the requirements of this subsection.

(a) A public school facilities element shall be based upon data and analyses that address, among other items, how level of service standards will be achieved and maintained. Such data and analyses must include, at a minimum, such items as: the 5-year school district facilities work program adopted pursuant to s. 235.185; the educational plant survey and an existing educational and ancillary plant map or map series; information on existing development and development anticipated for the next 5 years and the long-term planning period; an analysis of problems and opportunities for existing schools and schools anticipated in the future; an analysis of opportunities to collocate future schools with other public facilities such as parks, libraries, and community centers; an analysis of the need for supporting public facilities for existing and future schools; an analysis of opportunities to locate schools to serve as community focal points; projected future population and associated demographics, including development patterns year by year for the upcoming 5-year and long-term planning periods; and anticipated educational and ancillary plants with land area requirements.

- (b) The element shall contain one or more goals which establish the long-term end toward which public school programs and activities are ultimately directed.
- (c) The element shall contain one or more objectives for each goal, setting specific, measurable, intermediate ends that are achievable and mark progress toward the goal.

1 (d) The element shall contain one or more policies for
2 each objective which establish the way in which programs and
3 activities will be conducted to achieve an identified goal.
4 (e) The objectives and policies shall address items

- (e) The objectives and policies shall address items such as: the procedure for an annual update process; the procedure for school site selection; the procedure for school permitting; provision of supporting infrastructure; location of future school sites so they serve as community focal points; measures to ensure compatibility of school sites and surrounding land uses; coordination with adjacent local governments and the school district on emergency preparedness issues; and coordination with the future land use element.
- (f) The element shall include one or more future conditions map which depicts the anticipated location of educational and ancillary plants. The map will of necessity be general for the long-term planning period and more specific for the 5-year period.

Section 2. Subsection (1) of section 163.3180, Florida Statutes, is amended, and subsections (12) and (13) are added to said section, to read:

163.3180 Concurrency.--

(1)(a) Roads, sanitary sewer, solid waste, drainage, potable water, parks and recreation, and mass transit, where applicable, are the only public facilities and services subject to the concurrency requirement on a statewide basis. Additional public facilities and services may not be made subject to concurrency on a statewide basis without appropriate study and approval by the Legislature; however, any local government may extend the concurrency requirement so that it applies to additional public facilities within its jurisdiction.

(b) If a local government elects to extend the concurrency requirement to public schools, it should first conduct a study to determine how the requirement would be met and shared by all affected parties. The local government shall provide an opportunity for full participation in this study by the school board. The state land planning agency may provide technical assistance to local governments that study and prepare for extension of the concurrency requirement to public schools. When establishing concurrency requirements for public schools, a local government shall comply with the following criteria for any proposed plan or plan amendment transmitted pursuant to s. 163.3184(3) after July 1, 1995:

1. Adopt level-of-service standards for public schools with the agreement of the school board. Public school level-of-service standards shall be adopted as part of the capital improvements element in the local government comprehensive plan, which shall contain a financially feasible public school capital facilities program established in conjunction with the school board that will provide educational facilities at an adequate level of service necessary to implement the adopted local government comprehensive plan.

2. Satisfy the requirement for intergovernmental coordination set forth in s. 163.3177(6)(h)1. and 2.

(12) School concurrency, if imposed by local option, shall be established on a districtwide basis and shall include all public schools in the district and all portions of the district, whether located in a municipality or an unincorporated area. The application of school concurrency to development shall be based upon the adopted comprehensive plan, as amended. All local governments within a county,

except as provided in paragraph (f), shall adopt and transmit to the state land planning agency the necessary plan amendments, along with the interlocal agreement, for a compliance review pursuant to s. 163.3184(7) and (8). School concurrency shall not become effective in a county until all local governments, except as provided in paragraph (f), have adopted the necessary plan amendments, which together with the interlocal agreement, are determined to be in compliance with the requirements of this part. The minimum requirements for school concurrency are the following:

- government shall adopt and transmit to the state land planning agency a plan or plan amendment which includes a public school facilities element which is consistent with the requirements of s. 163.3177(12) and which is determined to be in compliance as defined in s. 163.3184(1)(b). All local government public school facilities plan elements within a county must be consistent with each other as well as the requirements of this chapter.
- (b) Level of service standards.--The Legislature recognizes that an essential requirement for a concurrency management system is the level of service at which a public facility is expected to operate.
- 1. Local governments and school boards imposing school concurrency shall exercise authority in conjunction with each other to establish jointly an adequate level of service standards, as defined in rule 9J-5 Florida Administrative Code, necessary to implement the adopted local government comprehensive plan, based on data and analysis.
- 2. Public school level of service standards shall be included and adopted into the capital improvements element of

the local comprehensive plan and shall apply districtwide to all schools of the same type. Types of schools may include elementary, middle, and high schools as well as special-purpose facilities such as magnet schools.

- 3. Local governments and school boards shall have the option to utilize tiered level of service standards to allow time to achieve an adequate and desirable level of service as circumstances warrant.
- (c) Service areas.--The Legislature recognizes that an essential requirement for a concurrency system is a designation of the area within which the level of service will be measured when an application for a residential development permit is reviewed for school concurrency purposes. This delineation is also important for purposes of determining whether the local government has a financially feasible public school capital facilities program that will provide schools which will achieve and maintain the adopted level of service standards.
- 1. In order to balance competing interests, preserve the constitutional concept of uniformity, and avoid disruption of existing educational and growth management processes, local governments are encouraged to apply school concurrency to development on a districtwide basis so that a concurrency determination for a specific development will be based upon the availability of school capacity districtwide.
- 2. For local governments applying school concurrency on a less than districtwide basis, such as utilizing school attendance zones or larger school concurrency service areas, local governments and school boards shall have the burden to demonstrate that the utilization of school capacity is maximized to the greatest extent possible in the comprehensive

plan and amendment, taking into account transportation costs and court-approved desegregation plans, as well as other factors. In addition, in order to achieve concurrency within the service area boundaries selected by local governments and school boards, the service area boundaries, together with the standards for establishing those boundaries, shall be identified, included, and adopted as part of the comprehensive plan. Any subsequent change to the service area boundaries for purposes of a school concurrency system shall be by plan amendment and shall be exempt from the limitation on the frequency of plan amendments in s. 163.3187(1).

- 3. Where school capacity is available on a districtwide basis but school concurrency service is applied on a less than districtwide basis in the form of concurrency services areas, if the adopted level of service standard cannot be met in a particular service area as applied to an application for a development permit and if the needed capacity for the particular service area is available in one or more contiguous service areas as adopted by the local government, then the development order shall be issued and mitigation measures shall not be exacted.
- (d) Financial feasibility.--The Legislature recognizes that financial feasibility is an important issue because the premise of concurrency is that the public facilities will be provided in order to achieve and maintain the adopted level of service standard. This part and chapter 9J-5, Florida

 Administrative Code, contain specific standards to determine the financial feasibility of capital programs. These standards were adopted to make concurrency more predictable and local governments more accountable.

1. A comprehensive plan amendment seeking to impose school concurrency shall contain appropriate amendments to the capital improvements element of the comprehensive plan, consistent with the requirements of s. 163.3177(3) and rule 9J-5.016, Florida Administrative Code. The capital improvements element shall set forth a financially feasible public school capital facilities program, established in conjunction with the school board, that demonstrates that the adopted level of service standards will be achieved and maintained.

- 2. Such amendments shall demonstrate that the public school capital facilities program meets all of the financial feasibility standards of this part and chapter 9J-5, Florida Administrative Code, that apply to capital programs which provide the basis for mandatory concurrency on other public facilities and services.
- 3. When the financial feasibility of a public school capital facilities program is evaluated by the state land planning agency for purposes of a compliance determination, the evaluation shall be based upon the service areas selected by the local governments and school board.
- (e) Availability standard.--Consistent with the public welfare, a local government may not deny a development permit authorizing residential development for failure to achieve and maintain the level of service standard for public school capacity in a local-option school concurrency system where adequate school facilities will be in place or under actual construction within 3 years after permit issuance.
 - (f) Intergovernmental coordination.--
- 1. When establishing concurrency requirements for public schools, a local government shall satisfy the

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requirements for intergovernmental coordination set forth in 1 s. 163.3177(6)(h)1. and 2., except that a municipality is not required to be a signatory to the interlocal agreement required by s. 163.3177(6)(h)2. as a prerequisite for imposition of school concurrency, and as a nonsignatory shall not participate in the adopted local school concurrency system, if the municipality meets all of the following criteria for having no significant impact on school attendance:

- a. The municipality has issued development orders for fewer than 50 residential dwelling units during the preceding 5 years, or the municipality has generated fewer than 25 additional public school students during the preceding 5 years.
- b. The municipality has not annexed new land during the preceding 5 years in land use categories which permit residential uses that will affect school attendance rates.
- c. The municipality has no public schools located within its boundaries.
- d. At least 80 percent of the developable land within the boundaries of the municipality has been built upon.
- 2. A municipality which qualifies as having no significant impact on school attendance pursuant to the criteria of subparagraph 1. must review and determine at the time of its evaluation and appraisal report pursuant to s. 163.3191 whether it continues to meet the criteria. If the municipality determines that it no longer meets the criteria, it must adopt appropriate school concurrency goals, objectives, and policies in its plan amendments based on the evaluation and appraisal report, and enter into the existing interlocal agreement required by s. 163.3177(6)(h)2., in order

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to fully participate in the school concurrency system. If such a municipality fails to do so, it will be subject to the enforcement provisions of s. 163.3191.

- (g) Interlocal agreement for school concurrency. -- When establishing concurrency requirements for public schools, a local government must enter into an interlocal agreement which satisfies the requirements in s. 163.3177(6)(h)1. and 2. and the requirements of this subsection. The interlocal agreement shall acknowledge both the school board's constitutional and statutory obligations to provide a uniform system of free public schools on a countywide basis, and the land use authority of local governments, including their authority to approve or deny comprehensive plan amendments and development orders. The interlocal agreement shall be submitted to the state land planning agency by the local government as a part of the compliance review, along with the other necessary amendments to the comprehensive plan required by this part. In addition to the requirements of s. 163.3177(6)(h), the interlocal agreement shall meet the following requirements:
- 1. Establish the mechanisms for coordinating the development, adoption and amendment of each local government's public school facilities element with each other and the plans of the school board to ensure a uniform districtwide school concurrency system.
- 2. Establish a process by which each local government and the school board shall agree and base their plans on consistent projections of the amount, type and distribution of population growth and coordinate and share information relating to existing and planned public school facilities projections and proposals for development and redevelopment,

and infrastructure required to support public school facilities.

- 3. Establish a process for the development of siting criteria which encourages the location of public schools proximate to urban residential areas to the extent possible and seeks to collocate schools with other public facilities such as parks, libraries, and community centers to the extent possible.
- 4. Specify uniform, districtwide level of service standards for public schools of the same type and the process for modifying the adopted levels of service standards.
- 5. Establish a process for the preparation, amendment and joint approval by each local government and the school board of a public school capital facilities program which is financially feasible, and a process and schedule for incorporation of the public school capital facilities program into the local government comprehensive plans on an annual basis.
- 6. Define the geographic application of school concurrency. If school concurrency is to be applied on a less than districtwide basis in the form of concurrency service areas, the agreement shall establish criteria and standards for the establishment and modification of school concurrency service areas. The agreement shall also establish a process and schedule for the mandatory incorporation of the school concurrency service areas and the criteria and standards for establishment of the service areas into the local government comprehensive plans. The agreement shall ensure maximum utilization of school capacity, taking into account transportation costs and court-approved desegregation plans, as well as other factors. The agreement shall also ensure the

achievement and maintenance of the adopted level of service standards for the geographic area of application throughout the 5 years covered by the public school capital facilities plan and thereafter by adding a new fifth year during the annual update.

- 7. Establish a uniform districtwide procedure for implementing school concurrency which provides for:
- a. The evaluation of development applications for compliance with school concurrency requirements;
- b. An opportunity for the school board to review and comment on the effect of comprehensive plan amendments and rezonings on the public school facilities plan; and
- $\underline{\text{c. The monitoring and evaluation of the school}}$ concurrency system.
- 8. Include provisions relating to termination, suspension and amendment of the agreement. The agreement shall provide that if the agreement is terminated or suspended, the application of school concurrency shall be terminated or suspended.
- (13) The state land planning agency shall, by October 1, 1998, adopt by rule minimum criteria for the review and determination of compliance of a public school facilities element adopted by a local government for purposes of imposition of school concurrency.

Section 3. Paragraph (i) is added to subsection (2) of section 163.3191, Florida Statutes, to read:

- 163.3191 Evaluation and appraisal of comprehensive plan.--
- (2) The report shall present an assessment and evaluation of the success or failure of the comprehensive plan, or element or portion thereof, and shall contain

appropriate statements (using words, maps, illustrations, or other forms) related to:

(i) The coordination of the comprehensive plan with existing public schools and those identified in the applicable 5-year school district facilities work program adopted pursuant to s. 235.185. The assessment shall address, where relevant, the success or failure of the coordination of the future land use map and associated planned residential development with public schools and their capacities, as well as the joint decisionmaking processes engaged in by the local government and the school board in regard to establishing appropriate population projections and the planning and siting of public school facilities. If the issues are not relevant, the local government shall demonstrate that they are not relevant.

Section 4. Subsection (5) is added to section 235.185, Florida Statutes, as created by chapter 97-384, Laws of Florida, to read:

235.185 School district facilities work program; definitions; preparation, adoption, and amendment; long-term work programs.--

(5) 10-YEAR AND 20-YEAR WORK PROGRAMS.--In addition to the adopted district facilities work program covering the 5-year work program, the district school board shall adopt annually a 10-year and a 20-year work program which include the information set forth in subsection (2), but based upon enrollment projections and facility needs for the 10-year and 20-year periods. It is recognized that the projections in the 10-year and 20-year timeframes are tentative and should be used only for general planning purposes.

Section 5. Subsection (1) of section 235.19, Florida Statutes, is amended to read:

235.19 Site planning and selection. --

shall determine the location of proposed educational centers or campuses for the board. In making this determination, the board shall consider existing and anticipated site needs and the most economical and practicable locations of sites. The board shall coordinate with the long-range or comprehensive plans of local, regional, and state governmental agencies to assure the compatibility of such plans with site planning.

Boards are encouraged to locate schools proximate to urban residential areas to the extent possible, and shall seek to collocate schools with other public facilities, such as parks, libraries, and community centers, to the extent possible.

Section 6. Subsection (2) of section 235.193, Florida Statutes, is amended to read:

235.193 Coordination of planning with local governing bodies.--

(2) A school board and the local governing body must share and coordinate information related to existing and planned public school facilities; proposals for development, redevelopment, or additional development; and infrastructure required to support the public school facilities, concurrent with proposed development. A school board shall use Department of Education enrollment projections when preparing the 5-year district facilities work program pursuant to s. 235.185, and a school board shall affirmatively demonstrate in the educational facilities report consideration of local governments' population projections to ensure that the 5-year work program not only reflects enrollment projections but also

considers applicable municipal and county growth and development projections. A school board is precluded from siting a new school in a jurisdiction where the school board has failed to provide the annual educational facilities report for the prior year required pursuant to s. 235.194 unless the failure is corrected.

Section 7. Until the minimum criteria for a public school facilities element adopted for purposes of imposition of school concurrency, as required by section 163.3180(13), Florida Statutes, are in effect, the state land planning agency shall utilize the minimum criteria for a public school facilities element adopted for purposes of imposition of school concurrency contained in the Final Report and Consensus Text by the Department of Community Affairs Public School Construction Working Group, dated March 9, 1998, in any compliance review of any such element.

Section 8. Any county whose adopted public school facilities element is the subject of a final order entered by the Administration Commission prior to the effective date of this act may implement its public school facilities element in accordance with the general law concerning public school facilities concurrency in effect when the final order was entered and in accord with the final order consistent with any appellate court decision. The county shall comply with the requirements of the final order, consistent with any appellate decision, in implementing its public school facilities element and in adopting any necessary amendment to its comprehensive plan.

Section 9. This act shall take effect July 1, 1998.