FIRST AMENDED AND RESTATED INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL FACILITY PLANNING AND IMPLEMENTATION OF CONCURRENCY

This FIRST AMENDED AND RESTATED INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL FACILITY PLANNING AND IMPLEMENTATION OF CONCURRENCY (the "Agreement") is entered into among the SCHOOL BOARD OF ORANGE COUNTY (hereinafter referred to as "School Board"), ORANGE COUNTY (hereinafter referred to as "County"), and the following cities and towns: CITY OF APOPKA, CITY OF BELLE ISLE, TOWN OF EATONVILLE, CITY OF EDGEWOOD, CITY OF MAITLAND, TOWN OF OAKLAND, CITY OF OCOEE, CITY OF ORLANDO, TOWN OF WINDERMERE, CITY OF WINTER GARDEN, and CITY OF WINTER PARK (collectively, "Municipalities") (together with the County, hereinafter sometimes referred to jointly as "Local Governments").

RECITALS

WHEREAS, the School Board, County, and Municipalities recognize their respective obligations and responsibilities for the education, nurture and general well-being of the children within their communities; and

WHEREAS, the School Board, County, and Municipalities recognize the benefits that will flow to the citizens and students of their communities by more closely coordinating their land development programs with the School Board's facilities planning process: namely (1) better coordination of the establishment of new schools in time and place with Residential Development, (2) greater efficiency for the School Board and Local Governments by locating schools to take advantage of existing and planned roads, water, sewer, and parks, (3) improved student access and safety by coordinating the construction of new and expanded schools with the road and sidewalk construction programs of the Local Governments, (4) better defined urban form by locating and designing schools to serve as community focal points, (5) greater efficiency and convenience by co-locating schools with parks, ballfields, libraries, and other community facilities to take advantage of joint use opportunities, and (6) reduction of pressures on schools that result from urban sprawl and support of existing neighborhoods by appropriately locating new schools and expanding and renovating existing schools; and

WHEREAS, sections 1013.33 and 163.31777, Florida Statutes, require the coordination of planning between School Board and the Local Governments to ensure that plans for construction and opening of schools are facilitated and coordinated in time and place with plans for Residential Development, concurrently with other necessary services. Such planning requires, in part and without limitation, that the location of schools must be consistent with the Comprehensive Plan and implementing Land Development Regulations of the Applicable Local Government; and
WHEREAS, sections 163.31777(1)(a) and 1013.33(2)(a), Florida Statutes, further require each county and the non-exempt municipalities within that county to enter into an interlocal agreement with the School Board to jointly establish the specific ways in which the plans and processes of the School Board and the local governments are to be coordinated; and

WHEREAS, local governments must review proposed amendments to an adopted future land use element for availability of necessary facilities and services so that proposed Comprehensive Plan amendments will maintain consistency with the requirements of section 163.31777(6)(a) when applied to the future land use element proposed to be amended; and

WHEREAS, section 163.3180(13)(g), Florida Statutes, requires that the School Board and the Applicable Local Governments enter into an interlocal agreement to implement statutory school concurrency requirements; and

WHEREAS, sections 163.31777(2)(e) and 163.3180(13)(g)6.b., Florida Statutes, require that the interlocal agreement implementing school concurrency provide 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

WHEREAS, Section 10 of this Agreement is intended to satisfy the requirement of section 163.3180(13)(g)6.b. by providing an opportunity for the School Board to review and comment on the effect of proposed Comprehensive Plan amendments and Rezonings on public schools and to provide an opportunity for local governments to consider the availability of School Capacity when reviewing proposed Comprehensive Plan amendments and proposed Rezonings; and

WHEREAS, to avoid confusion, Section 10 of this Agreement will have its own definitions applicable only to Section 10; and

WHEREAS, the School Board, County, and Municipalities enter into this Agreement in fulfillment of the foregoing statutory requirements and in recognition of the benefits accruing to their citizens and students described above; and

WHEREAS, the County, Municipalities and School Board have mutually agreed that coordination of school facility planning and comprehensive land use planning is in the best interests of the citizens of said County and Municipalities; and

WHEREAS, the County has jurisdiction for land use and growth management decisions within its unincorporated boundaries and the Municipalities have similar jurisdiction within their respective municipal boundaries; and

WHEREAS, the School Board has the responsibility to provide school facilities to ensure a free and adequate public education to the residents of the County and Municipalities; and
WHEREAS, the County, Municipalities and School Board agree that they can better fulfill their respective responsibilities by working in close cooperation to ensure that adequate public school facilities are available for the residents of the County and Municipalities; and

WHEREAS, Interlocal Agreements previously entered into by and among the Municipalities, County, and School Board must be updated or in some instances superseded; and

WHEREAS, the School Board, the County, and the Municipalities (except for the Town of Eatonville and the City of Edgewood) entered into that certain Amended Interlocal Agreement for Public School Facility Planning and Implementation of Concurrency, which was approved by the Board of County Commissioners on June 10, 2008 (the “Amended Interlocal Agreement”), for the purpose of implementing school concurrency pursuant to chapter 163, Florida Statutes; and

WHEREAS, pursuant to Section 13.4 of the Amended Interlocal Agreement, upon final approval by the School Board and the Local Governments, any amendment to the Level of Service standards requires an amendment to each Local Government’s Comprehensive Plan in addition to an amendment to the Amended Interlocal Agreement; and

WHEREAS, pursuant to Section 16.2 of this Agreement, the School Concurrency Service Areas shall be included as part of the supporting data and analysis for the Local Governments’ respective Comprehensive Plans; and

WHEREAS, pursuant to Section 14.3 of the Amended Interlocal Agreement, any changes to the School Concurrency Service Areas shall not be effective until approval by School Board, County and Municipalities, and prior to adopting any change to the School Concurrency Service Areas, School Board must make certain verifications with regard to the changes; and

WHEREAS, pursuant to Section 21 of the Amended Interlocal Agreement, any amendments to the Interlocal Agreement must be in writing and must be executed by all parties thereto; and

WHEREAS, the School Board, the County, and the Municipalities (except for the Town of Eatonville and the City of Edgewood) entered into that certain First Amendment to Amended Interlocal Agreement for Public School Facility Planning and Implementation of Concurrency for the purpose of modifying the Level of Service (“LOS”) standards, the School Concurrency Service Areas (“CSA”’s), and making other necessary changes, which was approved by the Board of County Commissioners on April 20, 2010 (the “First Amendment”); and

WHEREAS, section 13.2 of the Amended Interlocal Agreement created Long Term Concurrency Management Systems for certain CSAs identified in Appendix E to that Agreement; and

WHEREAS, School Board, County, and Municipalities acknowledge that incorporation of LOS standards, establishment of CSAs, and adoption of Long Term Concurrency Management Systems are accomplished by adoption into Local Governments’ respective Comprehensive Plans; and
WHEREAS, the School Board, the County, and the Municipalities wish to amend the Amended Interlocal Agreement, as amended, such that modifications to the School Concurrency Service Areas and the Long Term Concurrency Management Systems may be made solely by amending the Local Government Comprehensive Plans, rather than amending the Local Government Comprehensive Plans and this Agreement.

NOW THEREFORE, be it mutually agreed by and among the School Board, Orange County, and the City of Apopka, City of Belle Isle, Town of Eatonville, City of Edgewood, City of Maitland, Town of Oakland, City of Ocoee, City of Orlando, Town of Windermere, City of Winter Garden and City of Winter Park that the procedures set forth below will be followed in coordinating land use and public school facilities planning:

Section 1.  Recitals

The recitals set forth above are true and correct and are incorporated herein.

Section 2.  Incorporation of Prior Amendment

This Agreement incorporates the First Amendment and supersedes the Amended Interlocal Agreement in its entirety.

Section 3.  Definitions

Except as otherwise specified in Section 10 of this Agreement, the following words and terms shall have the following meanings in the interpretation of this Agreement:

Adjusted FISH Capacity: the number of students who can be served in a permanent public school facility as provided in the Florida Inventory of School Houses adjusted to account for the design capacity of Modular or In-Slot Classrooms on the campuses designed as Modular or In-Slot schools, but not to exceed Core Capacity.

Adjacency Review: the review as provided in Section 18.6 of this Agreement of School Concurrency Service Areas adjacent to the School Concurrency Service Area in which the proposed Residential Development is located.

Applicant: the person or entity submitting a Development Application (as defined in Section 10.1 hereof) or School Concurrency Determination Application, including its principals, agents, successors, and assigns.

Applicable Local Government: either the Local Government with land use jurisdiction over a proposed Residential Development, or the Local Government with land use jurisdiction over a proposed school site.

Available School Capacity: the ability of a School Concurrency Service Area to accommodate the students generated by a proposed development at the adopted Level of Service standards. Available School Capacity shall be derived using the following formula for each School Type:
Available School Capacity = (School Capacity x Adopted Level of Service\(^1\)) – (Enrollment\(^2\) + Reserved Capacity)

Where:
\(^1\)Adopted Level of Service = the ratio, expressed as a percentage, of Enrollment to School Capacity as jointly adopted by the School Board and Local Governments.
\(^2\)Enrollment = Student enrollment as counted in the most recent official October count.

**Capacity Commitment Agreement:** an executed Capacity Enhancement Agreement, whether individually or as part of a consortium of Capacity Enhancement Agreements, containing commitments to fund wholly or partially the construction of public school facilities to provide School Capacity at identified public schools required to serve the affected Residential Developments, as more fully set out in a Resolution of the School Board to be adopted within thirty (30) days from the date the School Board executes this Agreement.

**Capacity Encumbrance Letter:** a written determination from an Applicable Local Government temporarily reserving Available School Capacity during the pendency of a Site Plan application approval process and temporarily reserving the Available School Capacity needed to accommodate the impacts of the Applicant’s proposed Residential Development upon completion of the requirements in Section 18.7(a) of this Agreement.

**Capacity Reservation Fee:** a fee to reserve capacity, in an amount equivalent to the value of the impact fees calculated to be due from a proposed Residential Development as of the date of the reservation of capacity.

**Certificate of School Concurrency:** a written determination by an Applicable Local Government that all school concurrency review requirements have been satisfied for the proposed development and that the School Board has issued a School Concurrency Recommendation indicating that Available School Capacity is sufficient to accommodate students generated by the proposed Residential Development. A Certificate of School Concurrency vests a Residential Development for school concurrency, and reserves School Capacity for the proposed Residential Development, subject to (1) any conditions set forth in the Certificate of School Concurrency, (2) the requirements of this Agreement, (3) any ordinances or policies implementing this Agreement, and (4) any conditions imposed as part of, or as an inducement to, the School Concurrency Recommendation. A Certificate of School Concurrency may be included as part of a consolidated concurrency approval including other concurrency requirements by an Applicable Local Government and is not required to be a separate document.

**Comprehensive Plan:** a County or Municipality’s plan that meets the requirements of section 163.3177, Florida Statutes.

**Core Capacity:** the maximum number of students that can be effectively served in a school dining facility.
Development Analysis: the document required to be prepared and submitted under Section 18.4 of this Agreement as a requirement for the review of a School Concurrency Determination Application.

Development Impact: projected students from a Residential Development as a result of approval of a Development Application or School Concurrency Determination Application, calculated by multiplying the proposed number of dwelling units by the student generation rates by School Type as set forth in the most recent School Impact Fee Study, as may be updated from time to time.

Development of Regional Impact: a development within the definition of section 380.06, Florida Statutes.

District Facilities Work Program: the financially feasible District Facilities Work Program adopted by the School Board pursuant to section 1013.35(2)(a)2. And 1013.35(2)(b), Florida Statutes.

Educational Facilities Plan: the planning document adopted by the School Board pursuant to and consistent with sections 1013.35(2) and 1013.35(4), Florida Statutes that includes the District Facilities Work Program.

Educational Plant Survey: the survey of public school facilities, along with ancillary and supporting facilities, conducted by the School Board pursuant to and consistent with section 1013.31, Florida Statutes.

Encumbered Capacity: the School Capacity temporarily allocated to a Residential Development for one hundred eighty (180) days after the issuance of a Capacity Encumbrance Letter.

Final School Concurrency Recommendation: a written communication from the School Board informing the Applicable Local Government and Applicant that the School Board has: (i) calculated that there is sufficient Available School Capacity to accommodate the impacts of the Applicant’s proposed Residential Development, or (ii) has calculated that there is insufficient Available School Capacity to accommodate the impacts of the Applicant’s proposed Residential Development, but the School Board and the Applicant have negotiated and agreed upon a Proportionate Share Mitigation Agreement to address the impacts of the Applicant’s proposed Residential Development, or (iii) has calculated that there is insufficient Available School Capacity to accommodate the impacts of the Applicant’s proposed Residential Development and that the School Board and the Applicant were unable to agree upon a Proportionate Share Mitigation Agreement.

In-Slot Classrooms: relocatable classrooms that conceptually ‘slide’ into the spaces along a common walkway, as part of a modular campus which is characterized by a campus with brick and mortar core facilities and covered concrete walkways leading to the relocatable classrooms, and which are located at the following elementary schools: Clay Springs, Cypress Springs, Frangus, Hidden Oaks, Hunter’s Creek, John Young, Little River, Meadow Woods, MetroWest, Palm Lake, Rock Springs, Shingle Creek, Ventura, Waterbridge, Waterford, and Arbor Ridge.
Land Development Regulations: ordinances enacted by an Applicable Local Government pursuant to section 163.3213(2)(b), Florida Statutes.

Level of Service: percentage of Enrollment to School Capacity jointly adopted by the School Board and Applicable Local Governments and documented in Section 15 of this Agreement.

Permanent Student Station: space and capital resources considered to be satisfactory to accommodate an individual student within a non-relocatable educational facility as determined by the State of Florida Department of Education, as more specifically set forth in the State Requirements for Educational Facilities and including In-Slot Classrooms.

Preliminary School Concurrency Recommendation: a written communication from the School Board to the Applicable Local Government and the Applicant informing the Applicable Local Government of the School Board's preliminary calculation of the effect of the Applicant's proposed Residential Development on Available School Capacity for the applicable School Concurrency Service Areas. If the School Board calculates that an Applicant's proposed Residential Development will not cause the affected School Concurrency Service Areas to exceed capacity at the adopted Level of Service standards, then the Preliminary School Concurrency Recommendation shall become a Final School Concurrency Recommendation, upon which an Applicable Local Government may rely in encumbering and/or reserving the requisite Available School Capacity needed to accommodate the impacts of the Applicant's proposed Residential Development consistent with the requirements in Section 18.7(a) of this Agreement.

Proportionate Share Mitigation: an improvement or contribution made by an Applicant pursuant to a binding and enforceable agreement between the Applicant, School Board and Applicable Local Government to provide monetary compensation or other mitigation for the additional demand on deficient public school facilities created by a proposed Residential Development, as mandated in section 163.3180(13)(e), Florida Statutes, and as set forth in Section 19 of this Agreement.

Public School Facilities Element: the section of the County or a Municipality's Comprehensive Plan addressing the provision of educational facilities as required by sections 163.3177(12) and 163.3180(13)(a), Florida Statutes.

Reserved Capacity: School Capacity allocated to a particular Residential Development for a period of time specified in a Certificate of School Concurrency or a Capacity Commitment Agreement. For purposes of calculating Available School Capacity, Reserved Capacity also means the total amount of School Capacity reserved for all Residential Developments within a School Concurrency Service Area.

Residential Development: any development that is comprised of Residential Units, in whole or in part, for non-transient human habitation, and includes single-family housing and multi-family housing, regardless of whether the Applicable Local Government’s approval procedure for such development is considered commercial or residential.
Residential Unit: any occupied structure or part thereof, which is designed exclusively for human habitation and meets all applicable government requirements for residential use on a continuous basis; i.e., having hot and cold running water and adequate facilities for heating, cooking, sleeping, and the sanitary elimination of wastes. Hotels, motels, and temporary lodging facilities are specifically excluded.

Rezoning: a change in zoning classification that will result in a net increase of Residential Units on the property that is the subject of the Rezoning. For purposes of Section 10 of this Agreement, the term "Rezoning" shall also mean any land use change not necessarily denoted or characterized as a Rezoning (such as a change to a land use plan, master plan or development plan in a mixed use development, Development of Regional Impact, planned unit development, etc.) that will result in a net increase of ten (10) or more Residential Units on the property.

School Attendance Zone: a geographic area where students who reside within such area must attend a single designated school.

School Capacity: Adjusted FISH Capacity for the applicable School Concurrency Service Area as programmed in the first three (3) years of the District Facilities Work Program.

School Concurrency Determination Application: the written submittals for the determination of Available School Capacity for a Residential Development or a phase of a Residential Development, which is included as part of an application for Site Plan approval.

School Concurrency Recommendation: a written communication from the School Board informing the Applicable Local Government and Applicant that the School Board has (i) calculated that there is sufficient Available School Capacity to accommodate the impacts of the Applicant’s proposed development, (ii) has calculated that there is no Available School Capacity, or an insufficient amount of Available School Capacity to accommodate the impacts of the Applicant’s proposed development and recommends a Proportionate Share Mitigation agreement to address the impacts of an Applicant’s proposed Residential Development, or (iii) has calculated that an Applicant’s proposed residential development does not meet the requirements necessary to satisfy school concurrency and that the School Board and the Applicant were unable to agree on a proportionate share mitigation.

School Concurrency Service Area: a geographic area in which the Level of Service standards are measured by the School Board as designated in Section 15 of this Agreement.

School Impact Fee: the amounts due under the School Impact Fee Ordinance in connection with the construction of new School Capacity needed to accommodate Residential Development.

School Impact Fee Ordinance: Article V, Chapter 23, Orange County Code of Ordinances.

School Impact Fee Study: the study used by the County to update its School Impact Fee Ordinance, which shall mean, as of the date of this Agreement, that study prepared by Tindale-
Oliver & Associates, Inc., as of July 16, 2007, which may be amended and superseded from time to time.

School Type: a category of school based on instruction level, whether elementary school grades, middle school grades, or high school grades; ninth-grade centers shall be included with high schools and Arbor Ridge K-8 and Windy Ridge K-8 centers shall be included with elementary schools; grades Kindergarten through 5 of Blanker K-8 shall be included in elementary schools and grades 6-8 of Blankner K-8 shall be included with middle schools. Levels of Service for future K-8 schools will be consistent with the applicable School Attendance Zone.

Site Plan Approval: a subdivision approval or its functional equivalent under the Land Development Regulations of the Applicable Local Government, for any Residential Development or any phase of a Residential Development, whether single-family or multi-family. The Parties acknowledge that the County and the Municipalities may each have different terms within their individual Land Development Regulations describing this process.

State Requirements for Educational Facilities: the construction standards and requirements for the construction of schools, established pursuant to Rule 6A-2.0010, Florida Administrative Code.

Section 4. Interlocal School Planning Meetings

Representatives appointed by the chief executive of the School Board, County, and each Municipality shall meet on a quarterly basis or as called by any of the parties hereto to review proposed ordinances of the Municipalities and the County that might affect school concurrency, and formulate recommendations regarding coordination of land use and school facilities planning, and needed supporting infrastructure including such issues as population and student projections, development trends, school needs, co-location and joint use opportunities, and ancillary infrastructure improvements needed to support the school facilities and ensure safe student access as well as the implementation of this Agreement. Representatives from the East Central Florida Regional Planning Council will also be invited to attend. The School Board shall be responsible for making meeting arrangements, providing notification and maintaining a written summary of meeting actions. The group so convened shall be referred to as the "Technical Advisory Committee," also known as the “Interlocal Planners Group.”

Section 5. Student Enrollment and Population Projections

In fulfillment of their respective planning duties, the School Board, County, and Municipalities agree to coordinate and base their plans upon consistent projections of the amount, type, and geographic distribution of population growth and student enrollment. Countywide five (5) and ten (10) year population and student enrollment projections shall be revised annually by the School Board and provided at the first opportunity to the Technical Advisory Committee. In addition, the School Board shall work with the County or the County’s designated consultant to calculate a Student Generation Rate by School Type. In preparing said population and student enrollment projections, the School Board shall coordinate with the Municipalities and the County to ensure, inter alia, that new Residential Development and
redevelopment information as provided by the Municipalities and County is reflected in updated projections to be provided pursuant to Section 6 below.

Section 6. Coordinating and Sharing of Information

6.1 Tentative District Educational Facilities Plan. Annually, the School Board shall submit to the County and each Municipality the tentative district Educational Facilities Plan at least ninety (90) days prior to its adoption by the School Board. The tentative plan must be consistent with the requirements of section 1013.35, Florida Statutes, prior to its submittal to the County and Municipalities. The Municipalities and County shall review the tentative plan and comment to the School Board within sixty (60) days of receiving the tentative plan regarding the consistency of the plan with the Comprehensive Plan of the Local Government.

6.2 Mutual Reports.

(a) By March 1 of each year, the County and the Municipalities will provide the School Board with a report on growth and development trends within their jurisdiction for the prior year. Each report to the School Board must include the following information:

1. Type, number (estimated for land use and zoning approvals) and location of Residential Units that have received land use, zoning, subdivision plats or Site Plan Approvals.

2. Building permits and certificates of occupancy data for Residential Units issued for the preceding year and their location.

3. Summary of vested rights determinations or other actions that affect demands for public school facilities.

4. Information regarding conversion or redevelopment of housing or other structures into Residential Units that are likely to generate new students.

5. The identification of any development orders issued which contain a requirement for the provision of school sites as a condition of development approvals.

6. School Capacity encumbered during the previous calendar year.

7. School Capacity reserved during the previous calendar years.

(b) By March 1 of each year, the School Board will report to the County and the Municipalities.

1. School Capacity for each school and Level of Service for each School Concurrency Service Area and whether it is appropriate to reduce or increase the adopted Level of Service standards for particular School Types.
2. Available School Capacity and enrollment for each School Concurrency Service Area and each School, including a reconciliation of the encumbered and Reserved Capacity with Available School Capacity.

3. Proposed new capital needs, including identification of proposed new school sites, significant renovations, and closures as provided in Section 5 of this Agreement.

4. Whether ways to measure School Capacity other than Adjusted FISH Capacity are available and are better suited to measuring the ability of a school to address the curriculum needs of each school’s student population, and whether such a method of measuring capacity should be adopted in lieu of Adjusted FISH Capacity and included in the County’s and Municipalities’ Public School Facilities Element.

6.3 Coordinated Calendar.

Information shall be shared through the following, which shall be delivered or performed no later than:

March 1 or prior to the first meeting of the Technical Advisory Committee in a new calendar year, whichever comes first: Growth reports to the School Board from local governments, and from the School Board to local governments, as set out in section 6.2(a) and 6.2(b) of this Agreement.

Quarterly (by mutual agreement): School Planning Meetings.

July 1: Approval and submittal to the County and Municipalities of tentative Educational Facilities Plan, including District Facilities Work Program.

September 1: Local Government comment on tentative Educational Facilities Plan.

October 1: Adoption of by the School Board of the Educational Facilities Plan, including the District Facilities Work Program.

Section 7. School Site Selection, Significant Renovations, and Potential School Closures

7.1 Joint Participation. As provided in this Section, the Local Governments shall jointly participate with the School Board in the process of evaluating potential school closures, significant renovations to existing schools, and new school site selection.

7.2 Pre-Acquisition Procedures. Pursuant to section 1013.33(11), Florida Statutes, at least sixty (60) days prior to acquiring or leasing property that may be used for a new school, the School Board shall provide written notice to the Applicable Local Government requesting a determination of consistency with the Applicable Local Government’s Comprehensive Plan. The
Applicable Local Government shall notify the School Board within forty-five (45) days after receiving the necessary information and the School Board's request for determination, if the proposed new school site is consistent with the land use categories and policies of the Applicable Local Government's Comprehensive Plan. This preliminary notice does not constitute the local government's determination of consistency pursuant to section 1013.33(12), Florida Statutes.

7.3 Pre-Construction Procedures. As provided in section 1013.33(12), Florida Statutes, at least ninety (90) days prior to initiating construction, the School Board shall submit a site design/development plan to the County Administrator or the designated representative of an individual Municipality, and within forty-five (45) days after receiving the submittal, the County or Municipality shall certify, in writing, whether the proposed Educational Facility is consistent with the Comprehensive Plan and land development regulations of the Applicable Local Government. Failure of the local governing body to make a determination in writing within ninety (90) days after the School Board's request for a determination of consistency shall be considered an approval of the School Board's application.

7.4 Significant Renovations and Closures. Pursuant to Sections 163.31777(2)(b) and 1013.33(15)(b), Florida Statutes, when considering a significant renovation or a closure of a school facility, the School Board shall notify the appropriate municipality in which the school is located or the County's Growth Management Department if the subject school is in the unincorporated part of the County, prior to any significant renovation or closure activities. Significant renovations encompass projects that increase or decrease a school's student population by five percent (5%) or more, or increase a school's total building square footage by five percent (5%) or more.

7.5 Municipal Charter Schools. Any municipality that wishes to operate a Charter School in the manner provided by law may do so to the extent authorized by law, provided that if such Charter School is to be used to satisfy requirements of school concreancy, the Municipality must also enter into an interlocal agreement with the School Board.

7.6 Extension of Deadlines. By mutual agreement between the School Board and an Applicable Local Government, the times set forth in this section 7 may be extended.

Section 8. Supporting Infrastructure

The School Board and Applicable Local Governments will jointly determine the need for and timing of on-site and off-site improvements necessary to support each new school or the proposed significant renovation of an existing school, and where appropriate will enter into a written agreement as to the timing, location, and the party or parties responsible for constructing, operating and maintaining the required improvements.

Section 9. Coordination of Planning

9.1 School Board Participation. The County and Municipalities shall include a nonvoting representative appointed by the School Board to serve on their local planning agencies, or functionally equivalent agencies, to attend those meetings at which such agencies consider
proposed Comprehensive Plan amendments, development proposals and Rezonings that would, if approved, increase residential density on the property that is the subject of the application.

9.2 Notice. The County and Municipalities agree to give the School Board notification of future land use map amendments, development proposals and Rezoning proposals pending before them that may affect student enrollment, enrollment projections, or school facilities. Such notice will be provided in a timely manner to facilitate comment and the planning activities of the School Board.

Section 10. School Board Review of Plan Amendments and Proposed Rezonings and Capacity Enhancement Process

10.1 Definitions for Section 10. In addition to the terms defined in Section 1 of this Agreement, and for purposes of this Section 10, capitalized terms set forth below shall have the meanings assigned:

(a) Applicant: the person or entity submitting a Development Application, including its principals, agents, successors, and assigns.

(b) Capacity Enhancement Agreement: a legally enforceable and binding agreement meeting the requirements of this Section 10, between an Applicant and the School Board (and, when necessary, the Applicable Local Government), committing to Capacity Enhancement Mitigation determined to be necessary by the School Board to avoid or mitigate overcrowding individual schools impacted by the proposed Residential Development.

(c) Capacity Enhancement Mitigation: a Capital Contribution or School Facilities Commitment documented in a Capacity Enhancement Agreement to avoid or mitigate overcrowded conditions at an individual school or schools as calculated or determined in the manner provided in Section 10.7 of this Agreement.

(d) Capital Contribution: a payment to the School Board in an amount determined by the School Board to mitigate the impacts of a proposed Development Application where the impacts of such Development Application will exceed Net School Capacity beyond that planned for by the School Board in its District Facilities Work Program in effect at the time the Capacity Enhancement Agreement was executed.

(e) Comprehensive Plan Amendment: an amendment to the County's or a Municipality's Comprehensive Plan pursuant to Chapter 163, Florida Statutes, including an amendment to the future land use map, which will allow a net increase of Residential Units in the proposed Residential Development.

(f) Development Application: a formal request by an Applicant to obtain a Rezoning or Comprehensive Plan Amendment.
(g) **Net School Capacity**: the ability of an individual school to accommodate the increase in students generated by a proposed development at the adopted Level of Service standards. Net School Capacity shall be derived using the following formula by School Type:

\[
\text{Net School Capacity} = (\text{School Capacity}^1 \times \text{Adopted Level of Service}^2) - \text{Enrollment}^3
\]

Where:

1. School Capacity = Adjusted FISH Capacity at the individual school as programmed in the first three (3) years of the District Facilities Work Program.
2. Adopted Level of Service Standard = ratio expressed as the percentage of Enrollment to School Capacity as jointly adopted by the School Board and Applicable Local Governments.
3. Enrollment = Student enrollment at an individual school as counted in the official October count, including Reserved Capacity allocable to such school.

(h) **Rezoning**: A change in zoning classification that will result in a net increase of ten (10) single family or fifteen (15) multi family Residential Units in the proposed Residential Development that is the subject of the Rezoning. The term "Rezoning" shall also mean any land use change not necessarily denoted or characterized as a Rezoning (such as a change to a land use plan, master plan or development plan in a mixed use development, development of regional impact, planned unit development, etc.) that will result in a net increase of Residential Units in the proposed Residential Development.

(i) **School Capacity Determination**: a written determination by the School Board stating (i) that the Net School Capacity at the individual school or schools serving the School Attendance Zones affected by a proposed Development Application will be exceeded by the increase in residential densities proposed in the Development Application, or (ii) that the Net School Capacity at the individual school or schools serving the School Attendance Zones affected by a proposed Development Application will not be exceeded by the increase in residential densities proposed in the Development Application, or (iii) that as of the date of the Development Application there is not physically usable school capacity, but such physically usable capacity will be constructed within the time frames set forth in this Section 10.1, and that the School Board conditions a finding of sufficient capacity upon the Applicant’s agreement to defer Site Plan Approval until sufficient physically usable capacity is constructed.

(j) **School Facilities Commitment**: the necessary funding, capital dedication or financial commitment required to advance the construction of school facilities included in the applicable Capital Improvements Element and the District Facilities Work Program or to finance the construction of school facilities not in such element or program as necessary where Net School Capacity at the individual school(s) serving the proposed development will be exceeded by the residential density projected in a Development Application.
10.2 School Board Review and Comment. The School Board will advise the Applicable Local Government within fifteen (15) business days of the school enrollment impacts anticipated to result from the proposed Comprehensive Plan Amendment or Rezoning proposed in a Development Application, and whether Net School Capacity exists or is planned to accommodate the Development Impact. This Section 10 does not authorize a School Concurrency Determination under Section 18 of this Agreement, except as expressly provided in Section 10.9(c) herein.

10.3 Overview of Section 10 Process. The School Concurrency Service Areas established in Section 16 of this Agreement aggregate schools into defined geographic areas for the purpose of implementing school concurrency. In contrast, this Section 10 deals with the impact of additional Residential Units contemplated in a Development Application on individual schools within individual School Attendance Zones for each School Type that would serve the proposed Residential Development. This review and comment process requires that the School Board determine whether Net School Capacity as defined in this Section 10 is available at the individual schools where Residential Development contemplated in the proposed Development Application is located. The School Board shall issue a School Capacity Determination to the County and/or the affected Municipality and determine the Capacity Enhancement Mitigation, if any, necessary to ensure that the additional projected students that would result from the proposed Development Application will not cause individual schools impacted by a proposed Development Application to be overcrowded or aggravate existing overcrowding at the individual school or schools so impacted.

10.4 Findings. On the scope and necessity of the review and comment by the School Board of Net School Capacity at individual schools serving proposed Residential Development anticipated to occur within impacted School Attendance Zones and to ensure documented comment on the impact of a Development Application on Net School Capacity, the County and the Municipalities hereby acknowledge and declare the following:

(a) Article VII, section 704B.2., Orange County Charter, allows a County Ordinance to be effective within a Municipality if such Ordinance requires that any Rezoning or Comprehensive Plan amendment that increases residential density be approved by each significantly affected local government when such increase in residential density affects a school, the attendance zone for which straddles Local Government jurisdictional boundaries, if the School Board cannot certify that the school within the attendance zone or zones affected by such Rezoning or Comprehensive Plan amendment can accommodate the additional students that result from the increase in residential density.

(b) The Orange County Commission enacted Ordinance Number 2006-04 to implement the charter provision described in paragraph (a) above.

(c) It is the intent of the County and each Municipality to ensure that the staff and the governing body of each local government receive informed comment from the School Board as to whether Net School Capacity will be exceeded at individual schools as a result of a proposed Rezoning or Comprehensive Plan Amendment within or including their attendance boundaries and, if so, the extent to which the proposed Development
Impact will create overcrowding at individual schools where none exists or aggravate existing overcrowded conditions.

(d) A formal process for the prompt review and comment by the School Board on the effect of proposed Development Applications on Net School Capacity is an integral factor of intergovernmental coordination and of effective comprehensive planning, notwithstanding any subsequently imposed school concurrency requirements mandated as a condition of the Applicable Local Government’s approval of a Site Plan.

(e) A decision to increase the density or inventory of available residential land use by the approval of a Development Application by the County or a Municipality without an informed consideration of the impact on Net School Capacity at the individual schools affected by the Development Application may result in increased school overcrowding.

(f) Agreement on a process and procedure to determine whether Net School Capacity will be exceeded at individual schools serving proposed Residential Development resulting from Development Application approval is an integral part of the review process and comment opportunity mandated in Sections 163.3177(6)(a), 163.31777(2)(e) and 163.3180(13)(g)6.b., Florida Statutes.

(g) Mandatory application of Section 10 shall be limited to those circumstances detailed in Article VII, section 704B.2., Orange County Charter, and any County Ordinances authorized by and implementing such Charter provision, provided that nothing herein shall relieve any municipality from its statutory obligations to review proposed comprehensive plan amendments as provided Chapter 163, Florida Statutes.

10.5 Process for School Board Review and Comment on Development Application. Whenever the County or any Municipality receives a Development Application for a residential Rezoning that proposes ten (10) or more single-family or fifteen (15) or more multi-family Residential Units, or proposes an amendment to a Comprehensive Plan that would authorize a residential density that would generate one or more additional students, the Applicable Local Government shall forward, within five (5) business days of receipt, such Application to the School Board for a School Capacity Determination. Such Development Application shall include a Development Analysis as described in Section 18.5 of this Agreement. Within fifteen (15) business days of receipt, the School Board shall render in writing a School Capacity Determination.

(a) If the School Board calculates that Net School Capacity at the individual school(s) for each School Type that will serve the attendance boundaries where the proposed development is located will be exceeded, either because there is negative Net School Capacity as calculated pursuant to Section 10.1(g) of this Agreement, or because the number of students proposed to be generated by a development will create a condition of negative Net School Capacity, the School Board shall make a determination of insufficient capacity. Such determination shall be based on an analysis of the educational facilities that would be needed should the proposed Development Application be approved, the existing and planned School Capacity within the School Attendance Zones
impacted by the proposed Development Application, the educational facilities planned in
the applicable Capital Improvements Element, and the District Facilities Work Program.

(b) If the results of the School Capacity Determination indicate that the educational
facilities planned in the first three (3) years of the applicable Capital Improvements
Element and the District Facilities Work Program have the capacity to serve the
additional students to be generated by the proposed Development Application, the School
Capacity Determination shall state that capacity is available. A School Capacity
Determination that capacity is available shall not exempt a Residential Development
from complying with the requirement of obtaining a School Concurrency
Recommendation pursuant to the requirements of Section 18.

10.6 Result if Net School Capacity Exceeded. Where the School Board makes a determination
of insufficient capacity in a School Capacity Determination rendered pursuant to the process
provided in Section 10.5, the Applicant may elect to enter into a Capacity Enhancement
Agreement with the School Board. Such Capacity Enhancement Agreement will document the
Capital Contribution or School Facilities Commitment necessary to mitigate the conditions
outlined in the School Capacity Determination.

(a) The Capital Contribution required shall include a present value calculation of the
School Impact Fees anticipated to be due upon permitting of the proposed Residential
Units plus any additional Capacity Enhancement Mitigation required.

(b) The School Facilities Commitment shall specify the commitment necessary to
advance the construction of school facilities included in the applicable Capital
Improvements Element and the District Facilities Work Program, or to finance the
construction of school facilities not in such element or program but still deemed
necessary to timely serve the proposed Residential Units.

10.7 Determination of Overcrowding Conditions.

(a) If there is no Net School Capacity as calculated in the definition in Section
10.1(g) above, the impacted individual school or schools are presumed to be
overcrowded.

(b) If Net School Capacity at the impacted individual school or schools is insufficient
to meet the entire Development Impact of the Residential Development then the
individual school or schools are presumed to be overcrowded. In such event, the impacts
to be mitigated shall be documented in a Capacity Enhancement Agreement and shall be
calculated by subtracting the Net School Capacity at the individual school or schools
from the Development Impact of the proposed Residential Development. In such an
event, the methodology used to calculate the Capacity Enhancement Mitigation shall be
as follows:

\[
\text{Capacity Enhancement Mitigation} = (\text{Development Impact} - \text{Vested Students}) - \text{Net School Capacity} \times \text{Total Cost}^3
\]
When:
1 Vested Students = the number of students generated by the Residential Units allowed under the existing zoning or land use category for the specific parcel which is the subject of the Development Application.
2 Total Cost = the cost per student station plus a share of the land acquisition costs, additional core and ancillary facility costs and other anticipated infrastructure expenditures or the anticipated cost of school infrastructure needed to provide sufficient permanent capacity to the impacted individual school or schools, and includes any cost needed to pay the interest to advance a school scheduled in the District Facilities Workplan to an earlier year.

(c) If the individual school impacted by the proposed Residential Development fails to meet the adopted Level of Service as of the date of the School Capacity Determination, the mitigation required pursuant to the Capacity Enhancement Agreement shall be used to ensure that the overcrowding existing at the time of the submittal of a complete Development Application shall not be aggravated.

10.8 **Capacity Enhancement Agreement.**

(a) The provisions of this Agreement implementing the Capacity Enhancement process supplement the provisions of the Interlocal Agreement Regarding School Capacity entered into by the School Board, the County, and certain Municipalities effective as of June 21, 2006. To the extent that there is any conflict between the two Interlocal Agreements, the provisions of this Agreement shall prevail.

(b) The School Board shall monitor and enforce the terms of a Capacity Enhancement Agreement. Any mitigation required pursuant to a Capacity Enhancement Agreement remains subject to applicable Land Development Regulations.

(c) A Capacity Enhancement Agreement shall run with the land and shall be recorded in the Official Records Book of the County by the School Board or the Applicant. Upon an Applicant’s completion of all requirements and payment of any mitigation due under a CEA, the School Board shall record notice in the Official Records Book of the County that the Applicant has completed such requirements and paid such mitigation.

(d) Each Capacity Enhancement Agreement shall specify the term of said agreement and whether, upon expiration of said agreement, a new Capacity Enhancement Agreement shall be negotiated if the terms of the initial agreement were not satisfied.

(e) If the Capacity Enhancement Agreement constitutes Proportionate Share Mitigation, then the Applicable Local Government shall be a party to such agreement.

10.9 **Coordination of the Capacity Enhancement Agreement with Concurrency Management.**
(a) The Capacity Enhancement Agreement shall specify the capacity, if any, not subject to review for purposes of obtaining the issuance of a Certificate of School Concurrency pursuant to Section 18 of this Agreement as a consequence of the Capacity Enhancement Mitigation contained in such Capacity Enhancement Agreement. Upon payment of the required Capacity Enhancement Mitigation as calculated in Section 10.7 above, such mitigated capacity shall be considered encumbered for a period not to exceed three (3) years or until Site Plan Approval, whichever comes first.

(b) Any Capacity Enhancement Mitigation paid pursuant to a Capacity Enhancement Agreement, except for the cost of temporary classrooms needed to accommodate the Development Impact until permanent facilities are constructed, shall be credited toward any Proportionate Share Mitigation as provided in Section 19 of this Agreement.

(c) An Applicant may, at the time of submitting a Development Application, request a School Concurrency Recommendation under Section 18 of this Agreement.

(d) Any mitigation required and satisfied under any Capacity Enhancement Agreement shall be credited toward any required Proportionate Share Mitigation as calculated pursuant to Section 19 of this Agreement. In the event the calculated amount of Proportionate Share Mitigation is greater than the value of the mitigation required by such Capacity Enhancement Agreement, the required Proportionate Share Mitigation shall be equal to the amount by which the calculated Proportionate Share Mitigation exceeds the mitigation required under the Capacity Enhancement Agreement.

10.10 Applicability.

(a) The review and comment process contemplated in the terms of this section 10 shall apply to all Development Applications that have not received final approval by an Applicable Local Government prior to the effective date of this Agreement and to all designated phases within a development that have not received final approval prior to the effective date of this Agreement.

(b) The review and comment process contemplated by the terms of this section 10 shall not apply to any Capacity Enhancement Agreement executed prior to the effective date of this Agreement.

Section 11. Educational Plant Survey

Prior to completion of the Educational Plant Survey update, the Technical Advisory Committee shall assist the School Board in an advisory capacity in the preparation of the Educational Plant Survey and five (5) year District Facilities Work Program update by, inter alia, reviewing preliminary drafts, evaluating and making recommendations regarding the location and need for new (or improvements to existing) educational facilities in terms of consistency with the local government Comprehensive Plan and other relevant issues provided for in this Agreement, pursuant to sections 1013.31 and 1013.35, Florida Statutes.
Section 12. Co-location and Shared Use

Co-location and shared use of facilities are important to the School Board, the County and the Municipalities. The School Board, County and each Municipality will meet regularly to identify opportunities to co-locate and share use of school facilities and civic facilities when preparing the School Board's Educational Facilities Plan. Likewise, co-location and shared use opportunities will be considered by the local governments when preparing the annual update to the Comprehensive Plan's schedule of capital improvements and when planning and designing new, or renovating existing, community facilities. A separate agreement will be developed for each instance of co-location and shared use which, inter alia, addresses legal liability, operating and maintenance costs, scheduling of use, and facility supervision or any other issues which may arise from co-location or shared use.

Section 13. Establishment of School Concurrency System

13.1 Intent. This Agreement is intended to establish a public school concurrency system consistent with the requirements of sections 163.3177 and 163.3180, Florida Statutes, and other applicable provisions of the Local Government Comprehensive Planning Act of 2005.

13.2 Coordination Agreement. The School Board, the County and the Municipalities agree that the timely delivery of adequate public school facilities at the Level of Service standards adopted in this Agreement and the County's and the Municipalities' Comprehensive Plans requires close coordination among the local governments and the School Board beginning at the level of land use planning, development approval, and school facility planning. Further, the School Board and local governments agree that new school facilities should be planned for and provided in proximity to those areas planned for Residential Development or redevelopment. Further, the School Board shall review and provide a determination on all School Concurrency Determination Applications for the impact of the projected Residential Development on Available School Capacity.

13.3 School Capacity as a Condition for a Development Approval. The School Board, the County, and the Municipalities agree that an application for a Residential Development may be approved only if the School Capacity projected to be needed by the proposed Residential Development is or will be available to accommodate such projected need within the School Concurrency Service Areas at the Level of Service standards specified in this Agreement and the County’s and the Municipalities’ Comprehensive Plans. A determination of whether School Capacity is available to serve a Residential Development shall be made by the Applicable Local Government upon recommendation by the School Board, consistent with the Level of Service standards adopted in this Agreement and in the County’s and the Municipalities’ Comprehensive Plans. This determination of availability shall be based upon the criteria established in this Agreement, the District Facilities Work Program and the Public School Facilities Element of the Comprehensive Plan of the Applicable Local Government.

13.4 Local Government Covenants. After the effective date of the Comprehensive Plan amendments and ordinances adopted in accordance with this Agreement, the County and Municipalities agree to undertake the following activities:
(a) Incorporate the required school concurrency provisions into their Land Development Regulations and their Comprehensive Plans, consistent with the requirements of this Agreement. As an alternative to adopting school concurrency provisions in its Land Development Regulations, any Municipality may elect to be bound by the procedures set forth in this Agreement or may elect to be bound by the County’s School Concurrency Ordinance.

(b) Withhold any Site Plan Approval under the Land Development Regulations of the Applicable Local Government for new Residential Units not exempted under this Agreement until the School Board has reported whether there is Available School Capacity sufficient to serve the Residential Development under review as provided in Section 18 herein.

(c) Share information regarding population projections, school siting proposals, projections of development and redevelopment, infrastructure required to support public school facilities, and amendments to future land use plan elements as provided in this Agreement.

13.5 **School Board Covenants.** By entering into this Agreement, the School Board agrees to perform the following activities:

(a) Annually prepare and update a financially feasible District Facilities Work Program containing a five (5) year (or ten (10) year for backlogged facilities) capital improvement schedule consistent with this Agreement to demonstrate that the adopted Level of Service standards can be achieved and maintained at the end of the planning period adopted for each School Concurrency Service Area.

(b) Institute program and/or School Attendance Zone adjustments, as necessary, to maximize the utilization of capacity in order to ensure that each School Concurrency Service Area achieves and maintains the adopted Level of Service standards.

(c) Plan for, construct, and/or renovate school-related improvements necessary to maintain the adopted Level of Service standards.

(d) Provide the County and Municipalities with any School Board data, inventory and analysis relating to school concurrency necessary to amend or annually update each Local Government’s Comprehensive Plan.

(e) Adopt a ten (10) and twenty (20) year work program to the extent required by section 1013.35(2)(a), Florida Statutes.

(f) Review School Concurrency Determination Applications for compliance with concurrency requirements of this Agreement.
(g) Adopt Proportionate Share Mitigation options for new Residential Development contained in a School Concurrency Determination Application as provided in Section 18 herein.

(h) Prepare annual reports on enrollment and capacity.

(i) Provide necessary staff and material support for meetings of the Technical Advisory Committee as required by this Agreement.

(j) Provide information to the County and Municipalities regarding enrollment projections, school siting, and infrastructure required to support public school facilities consistent with the requirements of this Agreement.

(k) Develop, in conjunction with the County and Municipalities, uniform, Level of Service standards for public schools of the same type.

(l) Develop and implement such internal procedures necessary for review of applications for Residential Development consistent with this Agreement, including a process to temporarily set aside capacity during the pendency of a School Concurrency Determination Application or Proportionate Share Mitigation negotiation. Any procedures developed to implement this provision must be available and reachable on the School Board’s website.

Section 14. Development, Adoption and Amendment of Required Comprehensive Plan Elements

The County and the Municipalities have used their best efforts to have adopted the following Comprehensive Plan amendments by April 1, 2008, and continue to use their best efforts to adopt the following Comprehensive Plan amendments, and agree to follow the procedures set forth in this section 14 for any future amendments to the listed Comprehensive Plan elements after adoption:

(a) A Public School Facilities Element that is consistent with those adopted by the other Local Governments within the County. The Public School Facilities Element must also be consistent with this Agreement and section 163.3177(12), Florida Statutes, and Rule 9J-5.025, Florida Administrative Code.

1. In the event that it becomes necessary to substantively amend its Public School Facilities Element, the County or Municipality wishing to initiate an amendment shall request review through the Technical Advisory Committee prior to transmitting the amendment to the Department of Community Affairs pursuant to section 163.3184, Florida Statutes.

2. To achieve required consistency, the County and each Municipality shall adopt amendments to their Public School Facilities Element in accordance with the statutory procedures for amending Comprehensive Plans.
a. If the County or any Municipality objects to the amendment and the dispute cannot be resolved, the dispute shall be resolved in accordance with the provisions set forth in Section 20 of this Agreement. In such a case, the Local Government proposing to adopt the amendment objected to by one (1) or more of the Local Governments agrees not to adopt the amendment until the dispute has been resolved.

b. Any local public school facilities issues not specifically required by Chapter 163, Florida Statutes, may be included or modified in the Public School Facilities Element by following the normal Comprehensive Plan amendment process.

(b) Capital Improvements Element.

1. Once adopted by the School Board, as provided in section 1013.35, Florida Statutes, the annual update of the School District's Facilities Work Program shall be transmitted to the County and the Municipalities. The County and the Municipalities, upon approval by their governing bodies, shall adopt the School District's five (5) year (or ten (10) year for backlogged facilities) capital improvement schedule from the District Facilities Work Program into the Capital Improvements Element of their Comprehensive Plans no later than required by statute.

2. Once adopted by the School Board, any amendment, correction or modification to the School District's five (5) or ten (10) year capital improvements schedule or the District Facilities Work Program concerning costs, revenue sources, or acceptance of facilities pursuant to dedications shall be transmitted to the County and Municipalities. The County and Municipalities, upon approval by their governing bodies, shall amend their Capital Improvements Elements to reflect the changes at the next annual update to the Capital Improvements Element.

3. The County and the Municipalities, by adopting the School District's five (5) year (or ten (10) year for backlogged facilities) capital improvement schedule into their Capital Improvements Element shall have no obligation or responsibility for funding the District Facilities Work Program.

(c) Intergovernmental Coordination Element. The process for the development, adoption, and amendment of the Intergovernmental Coordination Element shall be as set forth in section 163.3184, Florida Statutes.

Section 15. Level of Service Standards

15.1 Establishment of Level of Service. To ensure that the capacity of schools is sufficient to support student growth and prevent the overcrowding of schools, the School Board, the County,
and the Municipalities have established the following uniform Level of Service standards for elementary, middle and high schools within each School Concurrency Service Area. The Level of Service standards for each School Concurrency Service Area shall be incorporated in the Comprehensive Plan of the County and each Municipality. However, pursuant to section 163.3180(9), Florida Statutes, the School Board, the County and the Municipalities may adopt interim Level of Service standards for backlogged facilities within long term school concurrency management areas as more fully set forth in Section 15.2 of this Agreement.

(a) Elementary schools: 110% of Adjusted FISH Capacity for each Elementary School Concurrency Service Area. The Elementary school LOS shall also include Arbor Ridge K-8, Windy Ridge K-8 and grades Kindergarten through 5 of Blankner K-8.

(b) Middle schools: 100% of Adjusted FISH Capacity for each Middle School Concurrency Service Area. The Middle school LOS shall also include grades 6-8 of Blankner K-8.

(c) High schools, including ninth grade centers: 100% of Adjusted FISH Capacity for each High School Concurrency Service Area.

15.2 Long Term Concurrency Management System.

(a) The School Board, the County, and the Municipalities agree to maintain long term concurrency management systems as provided in section 163.3180(9)(a), Florida Statutes. A long term concurrency management system will be adopted in the County’s and Municipalities’ Capital Improvements Element and any other applicable elements of their respective Comprehensive Plans. The long term concurrency management systems will be reviewed annually and any updates will be adopted in the next available annual update of the County’s and Municipalities’ respective Capital Improvement Elements, and any other applicable elements. Provided, however, that any additional schools included in a long term concurrency management system as a result of such annual update shall be assigned to a new concurrency management system with a specific end date and shall be required to meet the adopted level of service for the school type by such end date. In no event shall additional schools be added to a previously established long term concurrency management system.

(b) The School Board will develop and include within its District Facilities Work Program, a financially feasible plan to achieve the adopted Level of Service standards within ten (10) years through the construction of additional educational facilities sufficient to accommodate the demand for such capacity. The County and the Municipalities agree to amend the Capital Improvements Element and any other applicable elements of their respective Comprehensive Plans at the next available Comprehensive Plan Cycle to reflect any additional ten (10) year concurrency management systems.

15.3 Capital Improvements Element. By its incorporation of the capital improvement schedule consistent with the latest District Facilities Work Program prepared by the School
Board pursuant to Section 17 of this Agreement, the Capital Improvements Element of the Comprehensive Plans of the County and the Municipalities shall demonstrate that the Level of Service standards will be achieved and maintained within each School Concurrency Service Area by the end of the planning period utilized in the latest District Facilities Work Program, and, where applicable, shall include any Long Term Concurrency Areas. Pursuant to Section 14(b) of this Agreement, each local government shall adopt in the Capital Improvements Element of its Comprehensive Plan the capital improvement schedules included in the District Facilities Work Program adopted by the School Board pursuant to Section 17 of this Agreement.

15.4 Amending Level of Service Standards. The School Board, the County, and the Municipalities shall observe the following process for modifying the adopted or interim Level of Service standards for schools:

(a) At such time as the School Board determines that a change to the Level of Service standards is appropriate, it shall submit the proposed Level of Service standards and the data, inventory and analysis to support the changes to the County and the Municipalities, allowing the County and Municipalities at least ninety (90) days to comment on such proposal.

(b) Upon final approval by the School Board and the governing bodies of the County and Municipalities by approval and execution of an amendment to this Agreement, the modifications to the Level of Service standards shall be incorporated into the County’s and each Municipality’s Comprehensive Plan no later than the next available Comprehensive Plan amendment cycle for the County and each Municipality.

Section 16. School Concurrency Service Areas

16.1 School Concurrency Service Areas Established. The School Board, County, and Municipalities agree that school concurrency shall be applied on a less than county-wide basis. School Concurrency Service Areas have been established for elementary, middle, and high schools. School Concurrency Service Areas shall consist of one or more contiguous attendance zones. The School Board shall review School Concurrency Service Areas on an annual basis, making recommendations for any changes to School Concurrency Service Area, taking into account population changes, additional Available School Capacity from construction or renovation of schools, and resulting changes to attendance zones, in addition to contiguity of attendance zones and Levels of Service within School Concurrency Service Areas.

16.2 Incorporation of School Concurrency Service Areas into Comprehensive Plans. The School Concurrency Service Areas described above may be modified as provided in Section 16.3 below, and shall be included as supporting data and analysis in the County’s and the Municipalities’ Public School Facilities Element of their respective Comprehensive Plans.

16.3 Modification of School Concurrency Service Areas.

(a) The School Board, the County or any Municipality may propose a modification to the School Concurrency Service Areas, taking into account population changes,
additional Available School Capacity from construction or renovation of schools, and resulting changes to attendance zones, in addition to contiguity of attendance zones and Levels of Service within School Concurrency Service Areas. Prior to adopting any change, the School Board must verify that as a result of the modification:

1. The adopted Level of Service standards will be achieved and maintained by the end of the five (5) year (or ten (10) year for backlogged facilities) planning period; and

2. The utilization of School Capacity will be maximized to the greatest extent possible, taking into account transportation costs and state adopted student travel standards, court approved desegregation plans, the impact on School Capacity from committed and approved development, and other factors.

(b) The School Board, the County and the Municipalities shall observe the following process for modifying School Concurrency Service Areas:

1. At such time as the School Board determines that a School Concurrency Service Area change is appropriate considering the above standards, the School Board shall submit the proposed School Concurrency Service Area boundaries with data and analysis to support the changes to the County and the Municipalities.

2. The Local Governments shall review the proposed boundary changes and send their comments to the School District within ninety (90) days of receipt.

3. A change to a School Concurrency Service Area shall become effective upon final approval by the School Board. The County and the Municipalities shall include such change as supporting data and analysis in the County’s and the Municipalities’ Public School Facilities Elements and any other applicable elements of their respective Comprehensive Plans in the next available Comprehensive Plan cycle.

4. Any geographical boundary change to a School Concurrency Service Area that decreases Available Capacity within a School Concurrency Service Area shall only become effective upon final approval (by resolution) of the School Board and final approval (by resolution) of the affected Local Government(s).

Section 17. School District Facilities Work Program

17.1 Filing Dates.

(a) On or before the adoption of the School Board's annual budget, the School Board shall update and adopt its District Facilities Work Program for public schools in Orange County, in accordance with section 1013.35, Florida Statutes, and as set forth below. As
part of this update, the School Board shall provide a written summary of the infrastructure and improvements necessary to support the District Facilities Work Program, showing changes to the program on a yearly basis.

(b) The School Board shall transmit copies of the tentative District Facilities Work Program to the County and Municipalities for review and comment on or before July 1 of each year commencing after the effective date of this Agreement.

(c) The School Board shall adopt the District Facilities Work Program no later than September 30, and the plan shall become effective October 1 of each year.

17.2 Contents: Level of Service. The District Facilities Work Program shall contain a five (5) and a ten (10) year capital improvement schedule demonstrating that the Level of Service standards set forth in Section 15 of this Agreement and adopted into the County’s and Municipalities’ Comprehensive Plans can be achieved and maintained at the end of the planning period adopted for each School Concurrency Service Area. Such five (5) or ten (10) year capital improvement schedule in the District Facilities Work Program shall identify all construction, remodeling or renovation projects and committed and planned revenue sources needed to meet the financial feasibility requirement for each School Concurrency Service Area.

17.3 Contents: Future Planning. As a part of the District Facilities Work Program, and as specified in section 1013.35(2)(a), Florida Statutes, the School Board shall annually adopt a ten (10) and twenty (20) year tentative work plan based upon revenue projections, enrollment projections and facility needs for the ten (10) and twenty (20) year periods. The parties recognize that the projections in the ten (10) and twenty (20) year time frames are tentative and shall be used only for general planning purposes with the exception of the ten (10) year planning period for the Long Term Concurrency Areas described in Section 15 of this Agreement. Upon completion, the District Facilities Work Program and the tentative work plan will be transmitted to the County and Municipalities.

17.4 Amendment of Plan.

(a) The School Board shall not amend the District Facilities Work Program so as to modify, delay or delete any project in the first three (3) years of the program unless the School Board, by a majority vote of its members, provides written confirmation that:

1. The modification, delay or deletion of the project is required in order to meet the School Board’s constitutional obligation to provide a County-wide uniform system of free public schools or other legal obligations imposed by state or federal law or constitutional directive; or

2. The modification, delay or deletion of the project is occasioned by unanticipated changes in population projections or growth patterns; or

3. The project schedule or scope has been modified to address concerns of the County or Municipalities, and the modification does not cause the adopted
Level of Service standards to be exceeded in the School Concurrency Service Area from which the originally planned project is modified, delayed or deleted; or

4. The School Board determines that there exists a severe financial crisis brought about through a natural disaster or Act of God, war, or changes to anticipated revenues made by the state of Florida and over which the School Board has not control.

(b) Prior to taking any action authorized under this Section 17.4, the School Board shall publish an advertisement in a newspaper of general circulation not less than fourteen (14) days before the matter is presented to the School Board for a vote, and at such meeting, members of the public shall have the opportunity to address the School Board regarding the proposed action. In addition, notice of such meeting must be provided to all parties to this Agreement via U.S. Mail or acknowledged hand delivery not less than fourteen (14) business days prior to such meeting.

(c) If the School Board modifies, delays, or deletes a project in the first three (3) years of the District Facilities Work Program, pursuant to this Section 17.4, the School Board shall provide written notification of such modification, delay, or deletion to the County and the Municipalities via U.S. Mail or acknowledged hand delivery not less at least fourteen (14) days prior to School Board action.

(d) The School Board may amend the District Facilities Work Program to add necessary capacity projects to satisfy the provisions of this Agreement. For additions to the District Facilities Work Program, the School Board must demonstrate its ability to maintain the program’s financial feasibility.

Section 18. School Concurrency Implementation Procedures

18.1 Agreement to Implement and Maintain Levels of Service.

(a) The County, Municipalities and the School Board shall ensure that the Level of Service standards set forth in Section 15 of this Agreement and adopted into the County’s and Municipalities’ Comprehensive Plans for each School Type (as may be amended pursuant to Section 15.4 of this Agreement) are maintained consistent with the requirements of this Agreement. No Site Plan Approval shall be issued by an Applicable Local Government unless the Residential Development is exempt from these requirements as provided in this Section of this Agreement, or until a School Concurrency Recommendation has been issued by the School District indicating whether adequate school facilities exist or will exist to accommodate demand for Available School Capacity. Nothing shall prevent the local governments from placing conditions on the Certificate of School Concurrency to validate or render effective the certificate for the purpose of ensuring that necessary facilities will be in place, in order to validate or render effective the certificate.
18.2 Exemptions. The following residential uses shall be exempt from the requirements of school concurrency:

(a) Any Residential Development that creates an impact of less than one student.

(b) One single-family house, one (1) duplex, and/or one accessory multi-family unit being developed on an existing platted residential lot of record.

(c) Any building or structure that has received a Building Permit as of the effective date of the Amended Interlocal Agreement.

(d) Any new Residential Development that has Site Plan Approval for a site pursuant to a specific development order approved prior to the effective date of school concurrency, including the portion of any project that has received final subdivision plat approval as a residential subdivision into one (1) dwelling unit per lot.

(e) Any amendment to any previously approved Residential Development, which does not increase the number of dwelling units or change the type of dwelling units (e.g., converts single-family to multi-family, etc.).

(f) Any age-restricted community that qualifies as one of the three types of communities designed for older persons as "housing for older persons" in the Housing for Older Persons Act, 42 U.S.C. § 3607(b). This exemption shall be applied in conformity with the principles set forth in Volusia County v. Aberdeen at Ormond Beach, L.P., 760 So. 2d, 126 (Fla. 2000).

Provided, however, that any senior housing community or dwelling unit that loses its qualification as housing for older persons shall be required to meet applicable school concurrency requirements in effect at the time the qualification as housing for older persons is lost.

(g) Alterations or expansion of an existing dwelling unit where no additional dwelling units are created.

(h) The construction of accessory buildings or structures which will not create additional dwelling units.

(i) The replacement of a dwelling unit where no additional dwelling units are created and where the replacement dwelling unit is located on the same lot. If the type of dwelling unit is different from the original dwelling unit type, the exemption shall be limited to an exemption based on the current student generation rate for the original
dwelling unit type. Documentation of the existence of the original dwelling unit must be submitted to the concurrency management official.

(j) Developments of Regional Impact that have filed a complete application for a development order prior to May 1, 2005, or for which a development order was issued prior to July 1, 2005. This exemption shall expire upon withdrawal, denial, or expiration of the application for a development order. This exemption shall not apply where the developer files a Notice of Proposed Change and/or Substantial Deviation (as provided in statute) to increase the number of Residential Units. If such Development of Regional Impact has been approved, or is approved, through a development order, such exemption shall expire for any phase of the development order upon expiration of the development order build-out date for such phase, or for the entire development order upon expiration of the development order, or upon any material default of the school mitigation conditions of the development order or a related development agreement, unless such project, or portions of such project, remains exempt pursuant to another exemption provision.

(k) The portion of any Residential Development that, prior to the effective date of school concurrency, is the subject of a binding and enforceable development agreement or Capacity Enhancement Agreement designated as a Capacity Commitment Agreement by resolution of the School Board; however, such exemption shall expire upon expiration of the development agreement, Capacity Enhancement Agreement, extension thereof, or upon any material default of the school impact mitigation conditions of such development agreement or Capacity Enhancement Agreement, unless such project, or portions of such project, remains exempt pursuant to another exemption provision.

(l) Any Residential Development with a letter from the Applicable Local Government vesting it for purposes of complying with school concurrency, or which would be vested at common law for purposes of such concurrency requirement implemented by this Agreement, provided that the School Board may contest a vested rights determination as provided in the Land Development Regulations of an Applicable Local Government.

(m) Group living facilities that do not generate students and including residential facilities such as local jails, prisons, hospitals, bed and breakfast, motels and hotels, temporary emergency shelters for the homeless, adult halfway houses, firehouse sleeping quarters, dormitory-type facilities for post-secondary students, and religious non-youth facilities, regardless of whether such facilities may be classified as residential uses.

18.3 Determination of Applicability of Exemption. An Applicant filing an application for a determination that a Residential Development is exempt from the school concurrency requirements pursuant to Section 18.2 of this Agreement shall submit to the Applicable Local Government and the School Board, along with any other application requirements, sufficient documentation supporting the exemption that the Applicant claims exempts the Residential Development from the school concurrency requirements implemented by this Agreement. The Applicable Local Government shall determine, within thirty (30) business days from receipt of a
completed application for an exemption, whether the Applicant has satisfied the criteria for the claimed exemption and shall notify the Applicant and the School Board in writing of its determination.

18.4 Application Requirements. Any Applicant submitting a School Concurrency Determination Application with a Residential Development component that is not exempt under Section 18.2 of this Agreement shall prepare and submit a Development Analysis to the Applicable Local Government. The Applicable Local Government shall review the School Concurrency Determination Application for completeness, and forward complete applications to the School Board for its review.

18.5 Development Analysis Content. The Development Analysis shall include:

(a) The location of the Residential Development, including applicable tax parcel identification numbers;

(b) The number of Residential Units and unit types (e.g., single-family, multifamily, apartments);

(c) A phasing schedule (if applicable);

(d) A vicinity map showing, as applicable, existing and proposed zoning classifications and existing and proposed future land use categories for areas subject to and adjacent to the parcel for which the concurrency approval is sought;

(e) Any existing request by the School Board or Applicable Local Government for a school site within the parcel;

(f) Whether the Applicant proposes a school site and the estimated date of availability and the provider for on- and off-site infrastructure;

(g) Whether and how the Applicant's proposed school site satisfies the school site selection criteria set forth in this Agreement, or for a site in unincorporated Orange County as required in Art. XVIII, Chapter 38, Orange County Code; and

(h) If an Applicant has previously executed a Capacity Enhancement Agreement, the Applicant must attach a copy of the agreement to the Development Analysis and indicate whether the Residential Development in the application will exceed the capacity provided for in the Capacity Enhancement Agreement.

18.6 Review and Evaluation of Development Analysis. The Applicable Local Government shall transmit the Development Analysis to the School Board, or may require an Applicant to transmit directly to the School Board, for its review under the following review process:
(a) The Applicable Local Government or the School Board may charge the Applicant a non-refundable application fee, which may, in whole or in part, be payable to the School Board to meet the cost of review.

(b) The School Board staff may require additional information from the Applicant.

(c) The School Board staff shall review each Development Analysis in the order in which it is received and analyze whether there is Available School Capacity for each School Type in the affected School Concurrency Service Area to accommodate Development Impact of the Residential Development. Such a review by the School Board shall apply the following criteria:

1. To determine a proposed Residential Development's projected students for the development's projected number and type of Residential Units, the School Board shall determine the number of students projected within the specific School Concurrency Service Area using the school district student generation rate as calculated pursuant to Section 5 of this Agreement.

2. New School Capacity within a School Concurrency Service Area that is in place or under actual construction in the first three (3) years of the District Facilities Work Program will be added to the existing capacity shown in the School Concurrency Service Area, and will be counted to determine Available School Capacity for the Residential Development under review.

(d) Within fifteen (15) business days of receipt of the Development Analysis, the School Board shall have completed its review of the Development Analysis and shall issue a written Preliminary School Concurrency Recommendation.

(e) If the projected student growth from a Residential Development will cause the adopted Level of Service standards to be exceeded in the School Concurrency Service Area, and if Available School Capacity otherwise exists on a district-wide basis, adjacent School Concurrency Service Areas will be reviewed for Available School Capacity.

1. In conducting the Adjacency Review, the School Board shall consider the Available School Capacity in adjacent School Concurrency Service Areas to evaluate projected enrollments. If projected enrollment in one (1) or more adjacent School Concurrency Service Areas does not exceed 95 percent of the adopted level of service and the School District does not exceed 100% of Capacity on a district-wide basis for the School Type measured, the School Board shall issue a School Concurrency Recommendation that School Capacity is available and such capacity shall be available for use by the Residential Development.

2. In the event that the School Concurrency Recommendation is issued based upon Available School Capacity in an adjacent School Concurrency Service Area, the shift of the Development Impact into the adjacent School Concurrency
Service Area shall be documented by describing the method used to shift the Development Impact in the School Board’s Preliminary School Concurrency Recommendation Letter.

(f) In the event that there is insufficient Available School Capacity within the first three (3) years of a District Facilities Work Program for the School Concurrency Service Area in which the proposed Residential Development is located and, where applicable, in an adjacent School Concurrency Service Area to accommodate the Residential Development, the School Board shall so state in its Preliminary School Concurrency Recommendation detailing why the Residential Development is not in compliance, and offer the Applicant the opportunity to enter into a sixty (60) day negotiation period to allow time for the mitigation process described in Section 19 of this Agreement. If a proposed mitigation is agreed upon, the School Board shall enter into an enforceable and binding agreement with the Applicable Local Government and the Applicant pursuant to this Agreement.

(g) The School Board may render a Preliminary School Concurrency Recommendation to the Applicable Local Government advising the Applicable Local Government that the School Board and the Applicant have tentatively agreed on a Proportionate Share Mitigation Agreement for the proposed development. The Applicable Local Government may treat such a Preliminary School Concurrency Recommendation as a Final School Concurrency Recommendation finding Available School Capacity exists and may rely on such Final School Concurrency Recommendation to issue a Capacity Encumbrance Letter in accordance with the provisions of this Agreement.

(h) If the School Board finds that there is sufficient Available School Capacity within the subject School Concurrency Service Area, the School Board shall issue a Preliminary School Concurrency Recommendation to the Applicable Local Government and the Applicant so stating. In such event, the Preliminary School Concurrency Recommendation shall also be the Final School Concurrency Recommendation. The Applicable Local Government may then issue a Capacity Encumbrance Letter. The County or the Applicable Local Government shall be responsible for notifying the School Board when a development order for a Residential Development that has received a Certificate of School Concurrency expires or is revoked.

(i) The rendering of a School Concurrency Recommendation by the School Board confirming that Available School Capacity exists shall mean only that school facilities are currently available, and Available School Capacity will not be reserved until the Applicable Local Government issues a Certificate of School Concurrency or its functional equivalent.

(j) The School Board shall develop and implement a process to temporarily set aside capacity during the pendency of a School Concurrency Determination Application or Proportionate Share Mitigation negotiation.
18.7 Capacity Encumbrance and Reservation.

(a) The Applicable Local Government shall issue a Capacity Encumbrance Letter for a Residential Development within twenty-one (21) days from the receipt of a Final School Concurrency Recommendation from the School Board identifying the existence of Available School Capacity. A Capacity Encumbrance Letter issued pursuant to this Section shall be valid for one hundred eighty (180) days from the date of issuance. A Capacity Encumbrance Letter may be extended upon written approval by the Applicable Local Government and notice to the School Board for a period not to exceed an additional one hundred eighty (180) days, provided that the Applicant is able to demonstrate to the Applicable Local Government that the Applicant is proceeding in good faith to obtain necessary development approvals.

(b) Upon Site Plan Approval, the payment of a minimum one third of the Capacity Reservation Fee or all Proportionate Share Mitigation payments (if any), the Applicable Local Government shall issue a Certificate of School Concurrency. Once the Applicable Local Government has issued a Certificate of School Concurrency, Available School Capacity shall be reserved for the Residential Development for three (3) years. On each annual anniversary date of the Certificate of School Concurrency, the Applicant must pay one third of the Capacity Reservation Fee until such fees have been paid in full. Nothing herein shall preclude the Applicant from prepaying in advance any Capacity Reservation Fees required to be paid by this Section. An extension of a Certificate of School Concurrency for a Residential Development beyond the time authorized in Section 18.7(e) below shall require a de novo review for Available School Capacity to be performed by the Applicable Local Government and School Board. To ensure appropriate enforcement of this section, an Applicable Local Government may impose penalties for late or insufficient payments via duly adopted land development regulations.

(c) Any Capacity Reservation Fees paid shall be credited against payment of School Impact Fees.

(d) The Applicable Local Government shall notify the School Board within forty-five (45) days of any failure of any conditions of a Certificate of School Concurrency for a Residential Development.

(e) Upon a showing that an Applicant is proceeding in good faith and has paid all Capacity Reservation Fees the Applicable Local Government and the School Board may agree to extend the term of a Certificate of School Concurrency for up to three (3) additional years.

(f) An Applicant may only obtain building permits in direct proportion to the amount of Capacity Reservation Fees paid.

(g) If, upon the conclusion of the term of the Certificate of School Concurrency and any extensions approved under Section 18.7(d), an Applicant has not (i) incurred extensive obligations or expenses (other than land purchase costs and payment of taxes)
including, but not limited to, legal and professional expenses related directly to the Residential Development or (ii) otherwise substantially changed position in reliance upon the Certificate of School Concurrency, then all reserved or encumbered School Capacity not allocable to units for which building permits have been issued shall become unencumbered and unreserved and a minimum of ninety percent (90%) of any Capacity Reservation Fees paid shall be refunded to the extent that capacity is no longer reserved. Nothing in this Section shall be interpreted to preclude a Local Government from adopting an ordinance imposing non-transferable and/or non-refundable reservation fees designed to discourage speculation or marketeering in school capacity.

(h) The School Board and any Applicable Local Government may, by separate agreement, modify the procedures for capacity encumbrance and reservation.

18.8 Evaluation of Mitigation.

(a) Upon conclusion of the negotiation period specified in Section 19 of this Agreement, the School Board shall determine whether or not mitigation sufficient to provide capacity to serve the Residential Development has been proposed. If such mitigation has been proposed and agreed to, the School Board shall render a School Concurrency Recommendation documenting that Available School Capacity is or will be available for the Residential Development, once the mitigation measures have been memorialized in an enforceable and binding agreement with the Applicable Local Government, the School Board and the Applicant in a manner consistent with the applicable Land Development Regulations governing developer agreements. Such agreement shall specifically detail mitigation provisions, identify the proposed Residential Development, indicate the financial contribution to be paid by the Applicant, and include any other relevant terms and conditions, including providing for a method of surety in form of a bond or letter of credit in the amount of the contribution, if required.

(b) If mitigation is not agreed to, the School Board shall issue a Final School Concurrency Recommendation to the Applicant and the Applicable Local Government stating how the proposed Residential Development negatively impacts the Level of Service standards in the applicable School Concurrency Service Area and that the School Board and the Applicant were unable to reach agreement on a Proportionate Share Mitigation Agreement.

18.9 School Board Development Monitoring. The School Board shall create and maintain on its website a development review table for each School Concurrency Service Area and for each individual school, and will use the table to compare the projected students from proposed Residential Developments to the School Concurrency Service Area’s and each individual school’s available capacity programmed within the first three (3) years of the current five (5) or ten (10) year capital planning period. Student enrollment projections shall be based on the first three (3) years of the five (5) or ten (10) year capital planning period and shall be updated annually based on the enrollment counts issued on October 1 of each year. The development review table shall be updated to reflect these counts.
Section 19. Proportionate Share Mitigation

19.1 Intent. In accordance with sections 163.3180(13)(e)1 and 163.3180(13)(f)8, Florida Statutes, in the event that there is insufficient Available School Capacity within a School Concurrency Service Area to meet the demand for School Capacity created by a proposed development, as documented in a School Concurrency Recommendation or in an adjacent School Concurrency Service Area documented in an Adjacency Review, the School Board shall consider Proportionate Share Mitigation options and, if accepted, shall enter into an enforceable and binding agreement with the Developer and the Applicable Local Government to mitigate the Development Impact from the proposed Residential Development by the creation of additional Available School Capacity.

19.2 Calculation of Proportionate Share Mitigation.

(a) When the student impacts from a proposed development would cause the adopted Level of Service standards to be exceeded for a particular School Concurrency Service Area, the Applicant’s Proportionate Share Mitigation for the development will be based on the number of additional Permanent Student Stations and additional core and ancillary facilities necessary to meet the Level of Service standards established for the affected School Concurrency Service Area in this Agreement. The amount of Proportionate Share Mitigation will be calculated utilizing the cost per student station allocations for elementary, middle and high school plus the cost of land acquisition, core and ancillary facility requirements and other infrastructure expenditures, including required off-site improvements for school sites, as determined and published annually in the District Facilities Work Program.

(b) The methodology used to calculate Proportionate Share Mitigation shall be as follows:

\[
\text{Proportionate Share Mitigation} = (\text{Development Impact} - \text{Available Capacity}) \times \text{Total Cost}.^1
\]

Where:

\(^1\)Total Cost = the cost per student station plus a share of the land acquisition costs, additional core and ancillary facility costs and other anticipated infrastructure expenditures or the estimated cost of school infrastructure needed to provide sufficient Permanent Capacity to the impacted School Concurrency Service Areas, and includes any cost needed to pay the interest to advance a school scheduled in the District Facilities Workplan to an earlier year.

19.3 School Impact Fee Credit. Proportionate Share Mitigation shall be credited against the School Impact Fee otherwise due for the Residential Units within a Residential Development as provided for by statute.
19.4 Relationship of Capacity Enhancement Agreements to Proportionate Share Mitigation. To the extent the Residential Development is subject to a Capacity Enhancement Agreement entered into pursuant to Section 10 of this Agreement, the Capital Contribution paid pursuant to such agreement shall be a credit applied to the Proportionate Share Mitigation, as calculated in this Section. Proportionate Share Mitigation calculated pursuant to this Section 19 shall satisfy all mitigation requirements imposed under a Capacity Enhancement Agreement where the Proportionate Share Mitigation equals or exceeds the amount of mitigation required under a Capacity Enhancement Agreement.

19.5 Negotiation Period. Upon issuance of a Preliminary School Concurrency Recommendation reporting that the Applicant’s proposed Residential Development will exceed adopted Level of Service standards, the Applicant may request a meeting with the School Board to discuss how to mitigate the impact from the Residential Development through the creation of additional Available School Capacity. If the parties agree on a mitigation option deemed to satisfy financial feasibility by the School Board, the Applicant shall enter into a binding and enforceable agreement with the School Board and the Applicable Local Government with jurisdiction over the approval of the Site Plan.

19.6 Proportionate Share Mitigation Projects.

(a) Any Proportionate Share Mitigation must be directed by the School Board to a School Capacity improvement identified in, the capital improvement schedule in the financially feasible five (5) year district work plan of the District Facilities Work Program, and in the Capital Improvements Element in the Comprehensive Plan of the County and the Municipalities to maintain financial feasibility based upon the adopted Level of Service standards. If a School Capacity improvement does not exist in the District Facilities Work Program, the School Board may, in its sole discretion, add a School Capacity improvement to mitigate the impacts from a proposed Residential Development, so long as the financial feasibility of the District Facilities Work Program can be maintained and so long as the Applicable Local Government agrees to amend its Capital improvements Element to include the new School Capacity improvement.

(b) Mitigation options that provide permanent capacity are subject to School Board approval and may include, but are not limited to:

1. Contribution of land in conjunction with the provision of an additional school site meeting the school siting criteria, or adjacent land for expansion of an existing facility; or

2. Provision of additional Permanent Student Statics through the donation of buildings for use as a primary or alternative learning facility, provided that such building meets the State Requirements for Educational Facilities; or

3. Provision of additional Permanent Student Stations through the renovation of existing buildings for use as learning facilities; or
4. Construction of Permanent Student Stations or core facilities; or

5. Construction of a school in advance of the time set forth in the District Facilities Work Program; or

6. Creation of mitigation banking based on the construction of a public school facility in exchange for the right to sell capacity credits; or

7. Construction of a charter school designed in accordance with the State Requirements for Educational Facilities and providing Permanent Student Stations. Use of a charter school for mitigation must include provisions for its continued existence, including but not limited to the transfer of ownership of the charter school property and/or operation of the school to the School Board in the event of the closure of the Charter School; or

8. The contribution of funds or other financial commitments or initiatives acceptable to the School Board to ensure that the financial feasibility of the District Facilities Work Program can be maintained by the implementation of the mitigation options.

(c) The value of donated land shall be based upon a written appraisal prepared by an M.A.I. appraiser who was selected from a list of approved appraisers provided by the School Board. The valuation standard utilized by the M.A.I. appraiser shall be the fair market value of the donated land using the land uses and approvals in place prior to the submission of the Residential Development approval that triggered the proportionate share process. The subject land’s highest and best use shall be determined without any consideration of any enhanced value of the donated land resulting from approval by the County or the Applicable Local Government of the School Concurrency Determination Application with respect to which the land donation constituted a Proportionate Share Mitigation option.

Section 20. Resolution of Disputes

If the parties to this Agreement are unable to resolve any issue in which they may be in disagreement covered in this Agreement, such dispute will be resolved in accordance with governmental conflict resolution procedures specified in Chapters 164 or 186, Florida Statutes, or the Regional Dispute Resolution Process of the East Central Florida Regional Planning Council. This provision does not prohibit the School Board from contesting a vested rights determination as authorized in section 18.2(1) of this Agreement.

Section 21. Oversight

Oversight and evaluation of the school concurrency process is required pursuant to section 163.3180(13)(g)6.c., Florida Statutes. One or more representatives each of the County Commission, the governing body of each Municipality and the School Board will meet at least
once annually in a joint workshop session at which the public has the opportunity to be heard. A representative of the Regional Planning Council will also be invited to attend. The joint workshop sessions will be opportunities for the School Board, the County Commission, and the Municipalities' Commissions or Councils to hear reports regarding the implementation of this Agreement, discuss policy, set direction and reach understandings concerning issues of mutual concern regarding coordination of land use and school facilities planning, including population and student growth, development trends, school needs, off-site improvements, and joint use opportunities. The Superintendent of Orange County Public Schools shall be responsible for making meeting arrangements and providing notification. Public notice of these meetings shall be given in order that citizen oversight of the implementation of this Agreement shall be afforded.

Section 22. General Provisions

22.1 Headings. The headings or captions used in this Agreement are for convenience of reference only and are not intended to define or limit their contents, nor are they to affect the construction of or be taken into consideration in interpreting this Agreement.

22.2 Severability. If any part of this Agreement is determined by a Court of competent jurisdiction to be invalid, the part determined to be invalid shall be severed from this Agreement, and the remainder of this Agreement shall continue in force and effect.

22.3 Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Florida.

22.4 Entire Agreement. This Agreement contains the entire agreement of the parties with respect to the subject matter hereof.

Section 23. Amendment

Any amendments or modifications to this Agreement must be in writing and must be executed by all parties hereto.

Section 24. Effective Date

This Agreement will be effective within the County and each Municipality upon the adoption of each jurisdiction's Public School Facilities Element and amendments to the other elements of the respective Comprehensive Plans necessary to implement school concurrency. The failure of any or each of the proposed parties hereto to execute this Agreement shall not in any way affect the validity of this Agreement as between the other signatory parties hereto.

Section 25. Execution in Counterparts

This Agreement may be signed in counterparts, each of which may be deemed an original, and all of which together constitute one and the same agreement.
Signed, sealed and delivered in the presence of:

Print name: Angela Rochele
Print name: Angela Rochele

Approved as to form and legality by Eileen D. Fernández, the Office of the General Counsel for the School Board of Orange County, Florida, this 11th day of March, 2011

STATE OF FLORIDA
COUNTY OF ORANGE

The foregoing instrument was acknowledged before me this 11th day of March, 2011, by Bill Sublette, as Chairman and Ronald Blocker, as Secretary and Superintendent of the School Board of Orange County, Florida, a corporate body organized and existing under the constitution and laws of the State of Florida. Said persons (check one) □ are personally known to me or □ produced ____________________ as identification.

Printed Name: ____________________
Notary Public, State of Florida
Commission No. ____________________
My Commission expires: ____________ 

Notary Public State of Florida Deborah M. McGill My Commission EE036172 Expires 12/23/2014

"SCHOOL BOARD"

THE SCHOOL BOARD OF ORANGE COUNTY, FLORIDA, a corporate body organized and existing under the constitution and laws of the State of Florida

By: ____________________
Name: Bill Sublette
Title: Chairman, School Board

Attest: ____________________
Ronald Blocker, its Secretary and Superintendent

{Corporate Seal}

Date: March 11, 2011